San Diego County Democratic Party
VoteBuilder Manual for Campaigns

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This is an update of our SDCDP manual that was started in 2008 when minimal VoteBuilder user documentation was available. Since then, the amount of detail and information available directly in VoteBuilder has vastly improved including the addition of many training videos. VoteBuilder itself has undergone many functional improvements and we've updated the manual to reflect that.

This manual also describes features made available by the SDCDP to campaigns where the VoteBuilder documentation alone will not be sufficient.

Images included in the manual come from prior and current versions of VoteBuilder, multiple different sources, computers, operating systems, and browsers and may not appear exactly the same as you see them on your device. Our goal has been to make sure that the functionality is the same even if it is visually slightly different. VoteBuilder updates their interface frequently so you may find features that have been renamed slightly or are not pictured or covered.

Kami Olsson

Voter File Manager

San Diego County Democratic Party

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1   VoteBuilder Basics

VoteBuilder is the DNC's version of the VAN database; for our purposes they can be used interchangeably. Three separate but connected data sections make up VoteBuilder:

- Registered Voters in **My Voters** (from the Registrar of Voters)
- Campaign volunteers/staffers/supporters in **My Campaign** (you add these)
- **Users** who have VoteBuilder login (you create these, a subset of the people in **My Campaign**)

An individual may appear in one, two, or all three of these data sections. The vast majority of individuals are only in **My Voters**. The information you put into **My Campaign** is not shared with other campaigns that use VoteBuilder. Contact information can be copied from My Voters to My Campaign, but changes in My Campaign do not get copied back to My Voters.

1.1   VoteBuilder Terminology for Campaigns

The following terminology should help in understanding the VoteBuilder system:

- **Committee** – the SDCDP and each campaign has its own identification as a "committee". Some users may be assigned to multiple committees and will be given a choice to select the committee.
- **My Voters** – all registered voters in San Diego County accessed by selecting the My Voters tab (default). This database is periodically updated with new information from the ROV at the SDCDP office. All committees have access to the My Voters data and can share canvassing information.
- **My Campaign**– a list of your campaign volunteers/staffers/supporters accessed by selecting the My Campaign tab. This optional area is for you to help manage your campaign contacts. Each committee has its own My Campaign data.
- **Users** – the volunteers or staff members with VoteBuilder access. Each user will be assigned an appropriate access profile for each of My Voters and My Campaign.
- **Canvasser** – someone who collects data for the campaign. May also be a user (no longer required).
- **Calling/Walking** – Canvassing is typically accomplished by either Calling or Walking voters. The canvassing information included on the Voter Lists will depend on whether you specify the source as Calling or Walking and whether you specify a Script to go with the Voter List.
- **Survey Questions** –can be included in a script for canvassing. Survey Questions are associated with a Committee (e.g., "Do you support John Smith for City Council?"). SDCDP creates these for you in My Voters.
- **Scripts** – specify what a canvasser should say, what questions to ask as Survey Questions or Activist Codes. My Campaign scripts also have Events.
- **Activist Codes** – are used to provide categorical information about an individual that could be helpful for future usage. (e.g., "Spanish Speaking").
- **My List** – targeted list of people created from simple to complex criteria, you can have one list as your current list at any time in each of My Voters and My Campaign. This list can be formatted and printed or saved as PDF.
- **Saved Lists** – a list of people that was created and saved at a specific date/time. Use caution as people added since that date who meet the original search criteria will not be included on the list.
- **Saved Searches** – search criteria for creating a list that you save for future usage so you can generate an updated list using the same criteria.
- **Print/Report Format** – a format to be used with My List so that it can be printed.
- **Targets** – a target is a search or a list that has been specially processed for the speed of searching and so it can be shown on a report or in a phone bank.

- **Help Wiki** – the Wiki logo appears in the upper right corner of many pages and will provide you with help for the page you are working on.

1.2 Login / Logout

1. In order to log into VoteBuilder, you must have a user account created for you. Accounts for Campaign Admins and Deputy Campaign Admins are created by the SDCDP Office. All other user accounts for your campaign are created by the Campaign Admin.

2. When your account is first created, you will be emailed a message to create an ActionID:

OC Demo,

Your username is **ocdemo**

To log in, create an ActionID. If you choose, you can create your ActionID using your personal email. That way you can use it at any campaign or organization that uses NGP VAN in the future - it's yours for life. Click the link below to create your ActionID.
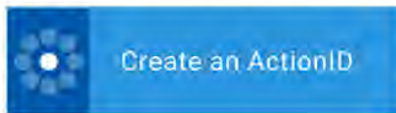
Create an ActionID

Thanks,
www.votebuilder.com Site Management

3. If you don't already have an ActionID, follow the instructions for creating an ActionID.

4. If you already have an ActionID, follow the instructions to link this new campaign to your current action ID. One ActionID allows you to have one password and to be able to switch between campaigns (aka committees). On each login, you will be asked which campaign you would like to begin with. The ActionID is also used for NGP accounts if you are using that.

5. If you previously were using a VoteBuilder password, which needs to be updated every 30 days, we recommend you switch to ActionID. If you can't recall your password, click the "I forgot my password" link. You should get a password reset link via the email list you provided.

Log in with your VAN ID

User Name
Password
I forgot my password
Log In

6. If you have forgotten your user name, please contact the SDCDP at 858-277-3367 or email vansupport@sddemocrats.org.

7. For subsequent logins, go directly to http://www.votebuilder.com.

1.2.1 Automatic Logout

VoteBuilder will log you out after a relatively short period of inactivity.

1.2.2 PIN

Admin security levels require a numeric PIN. The PIN is set and entered using letters that correspond to the numbers shown – e.g. 1593 is XOZU in the sample below. The letters will be randomized each time you log in.

When you set up a PIN for the first time, you will be asked to enter the PIN twice. Make sure you use the corresponding randomized letters each time.

1 X	2 H	3 U
4 G	5 O	6 T
7 F	8 A	9 Z
	0 B	
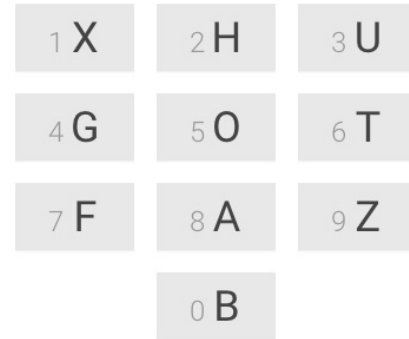
2   My Voters

You will use **My Voters** to:

- Target groups of voters for canvassing
- Create questions for your canvassers to ask voters
- Create virtual phone banks for canvassers to use
- Create formatted and printed lists of voters for canvassers to walk/call
- Enter canvassing results for people working off of printed lists
- Analyze canvass results
- Use counts/crosstabs for demographics
- Create lists of supporters to contact for GOTV

The flow of data into My Voters comes from multiple sources:

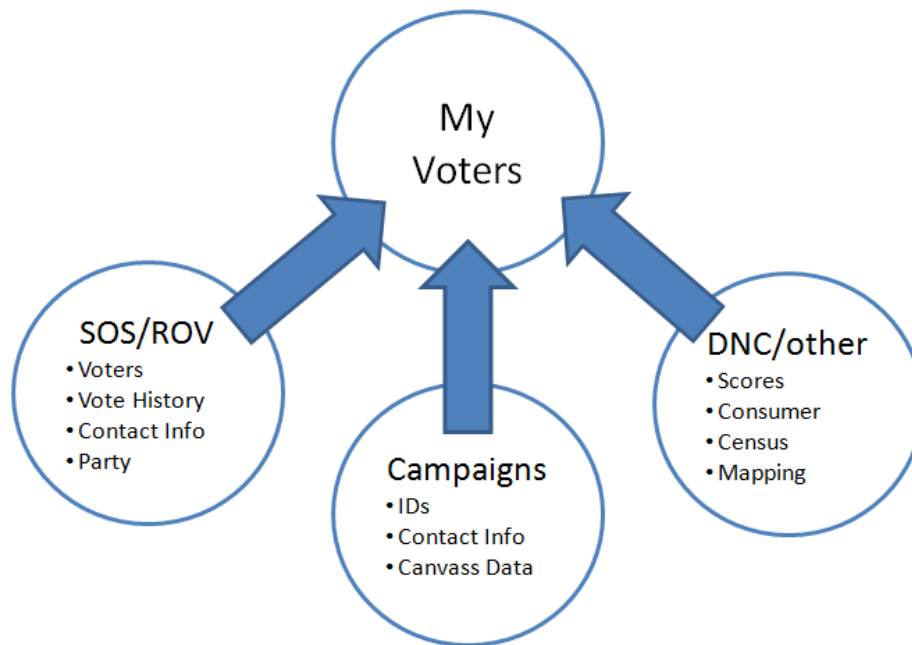The SOS/ROV provides periodic updates to My Voters to add new registrations, remove voters who are no longer registered. Canvass results, voting history, contact information etc. is maintained for voters not impacted by the ROV updates. During the Early voting month, regular updates are being made to VoteBuilder to show who has requested/returned a ballot.

The information put into in My Voters universe by the SOS/ROV and DNC/other is shared by all VoteBuilder committees. That means that all campaigns that use VoteBuilder will see a change to a phone number or if your campaign marks someone as moved or deceased. SDCDP shares some Survey responses, Activist Codes, and Contact History with our San Diego County endorsed campaigns. If you have information you want to share with other campaigns, please check with SDCDP. Notes you add to individual voters will be limited to viewing by your committee.

Information that you create for your campaign will not be shared with other committees unless you explicitly ask the SDCDP to share it on your behalf. SDCDP will share relevant information with your committee (e.g., for a congressional campaign if the GO Team is canvassing for support).

2.1 Main Menu Page

1. The **Main Menu** page is the "Home" page of the VoteBuilder. Your assigned profile may be slightly different from the following sample:

2. At the far right of the top blue bar in darker blue, is your name and a pulldown menu that allows you to update your contact info, password, email preferences, payment info (for using paid calling) to manage ActionID, to access the Wiki and Help Docs. If you have set up Action ID, you will have links appropriate to managing that.

3. To the left of your name, is the search icon which you can use as a **Quick Navigation** to move between different pages and functions without going back to the Main Menu. To use that begin typing what you want to do (e.g., My List). You can also get this menu by using the keyboard shortcut access via Ctrl + / (Mac Users Command + /).

4. As you begin to use the system, you will also see an icon in the light blue bar for your downloads and for your support tickets:

5. If your campaign is using both **My Voters** and **My Campaign**, you will see tabs which allow you to select which database you want to work in – each one has a Main Menu page. **My Voters** is where you would create walk lists, update voters, and enter canvassing data. **My Campaign** is used for volunteer/supporter/event management. You can tell what database you're in by the color of the tab at the top:
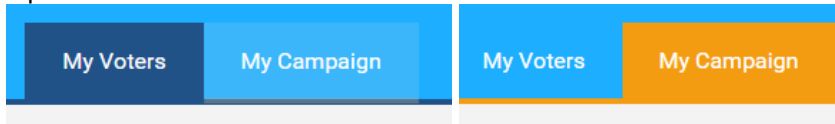
6. Help is available many pages of the VoteBuilder via the **Help Wiki** link.

7. The **What's New** link includes new features that have been added to VoteBuilder, demonstrated by a number in a box. In the sample shown, there are 8 new features.

8. On many pages of VoteBuilder, a gear appears next to Help that allows you to adjust settings for that page.

9. The left section of the page includes the **Welcome Menu** which includes requests and output files, assigned follow-up calls, a way to contact the Admin, as well as NGP VoteBuilder Help and Training Guides.

   NGP VoteBuilder has been continuously adding to the Help and Training Guides. There are many guides and videos available in that section that you may find useful.


10. Beneath the help and training guides, and the white **Admin Menu** with administrative navigation.
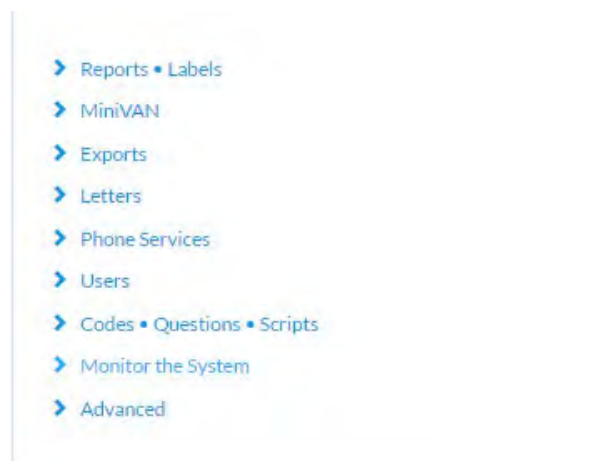
11. The middle section has the **Quick Look Up** and **Lists** functions you will use most frequently for finding voters and creating lists of voters to canvass.

12. In the middle of the column is the **Get Out The Vote** section which has tools for you to use for striking voters off of your printed lists during Early Voting and on Election Day.

13. The bottom of the middle column has the **Reporting and Data Analysis** section that you will use to create universes and once you have entered canvassing data.
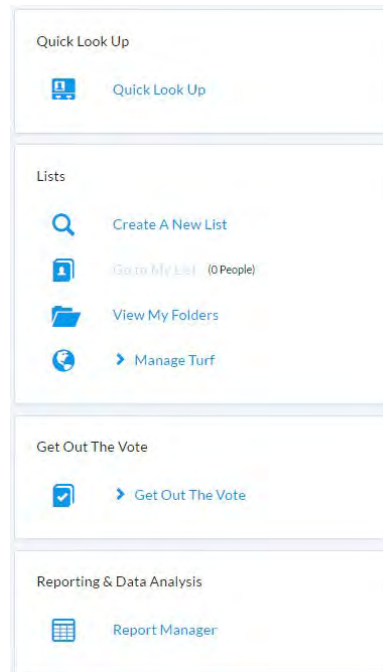
14. The top of the right column has the **Load Data** functions which will allow data from canvassing or other sources to be entered into VoteBuilder using a variety of methods. Only the Admins have the Bulk Uploads function.

15. In the **Quick Tasks** section, your campaign may find the **Virtual Phone Bank** to be an effective tool:
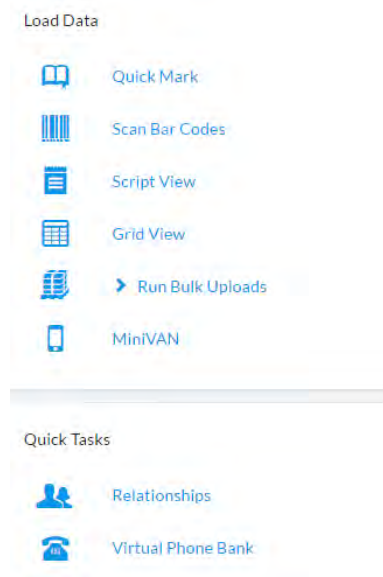
16. As you navigate into the features of VoteBuilder, you can always return the Main Menu page by using the navigation path aka "breadcrumbs".

17. On the far left of the page is the sidebar navigation bar (new for 2016). It provides quick access to many frequently used features of VoteBuilder that can be accessed from any page. This side navigation bar can be hidden by clicking on the three-line menu button to the left of the My Voters tab, but if open it will remain viewable as you navigate the website and will allow you to go directly to these frequently used pages without having to return to the main menu. It also has a search box so you can search for a page by name.
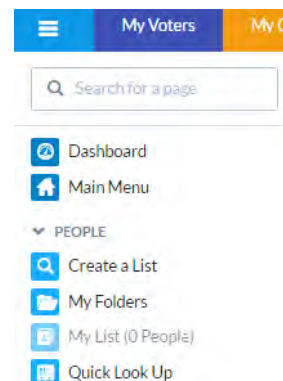
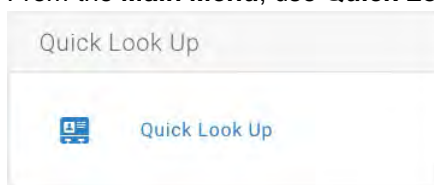18. The top item is your Dashboard which is intended to surface the most important items you need day-to-day:
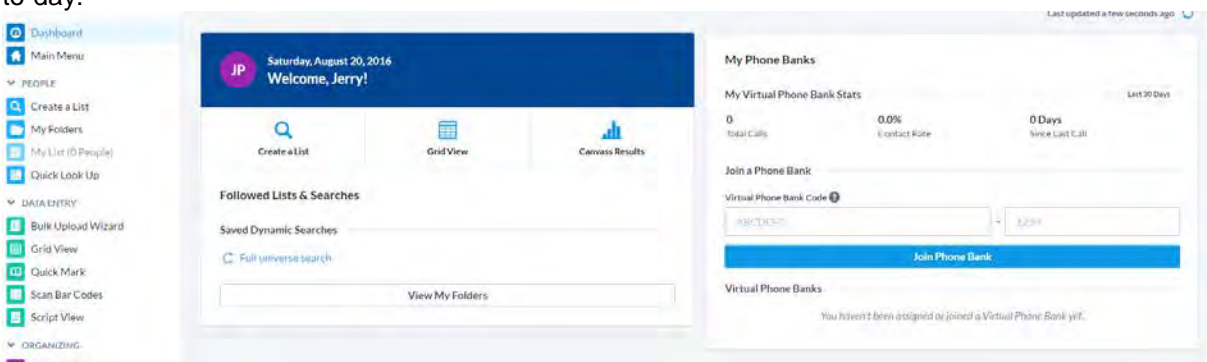
2.2   Quick Look Up

1. From the **Main Menu**, use **Quick Look Up** to search for a voter:

2. On the Quick Look Up page, enter some information on the voter: name, street address, phone number, etc. You do not need to enter full names. Click the Search button with your mouse:

3. The result(s) of the search will be shown below the criteria you entered. The search may take a few minutes to complete. When completed, a list of names will appear on the screen and you can click on a name to select that person:

Name	Address	City	Age	Phone
Law, Billy	1931 Ridge View Dr	San Diego	30	(619) 527-4529
Law, William E	3865 Carancho St	La Mesa	115	(619) 464-0068
Law, William H	2606 Aperture Cir	San Diego	19	
Law, William P	715 Harbison Canyon Rd	El Cajon	49	(619) 659-6035

4. You may want to change the columns that are displayed. Click the settings gear that is next to the Help Wiki:

5. Click, drag and drop any column header between the two lists until you have the group and order you want:

6. Note that the list now has columns for Party and Sex:

Name	Address	City	Age	Phone	Email	Party	Sex
Law, Billy	1931 Ridge View Dr	San Diego	30	(619) 527-4529		N	M
Law, William E	3865 Carancho St	La Mesa	115	(619) 464-0068		N	M
Law, William H	2606 Aperture Cir	San Diego	19			N	M
Law, William P	715 Harbison Canyon Rd	El Cajon	49	(619) 659-6035		D	M
Law, William R	8433 Via Mallorca Unit 98	La Jolla	54	(858) 657-9046		R	M
Lawler, William H	15735 Zeigler Ct	Ramona	86	(760) 787-9668		D	M

7. Click on the name of the person to open their page:
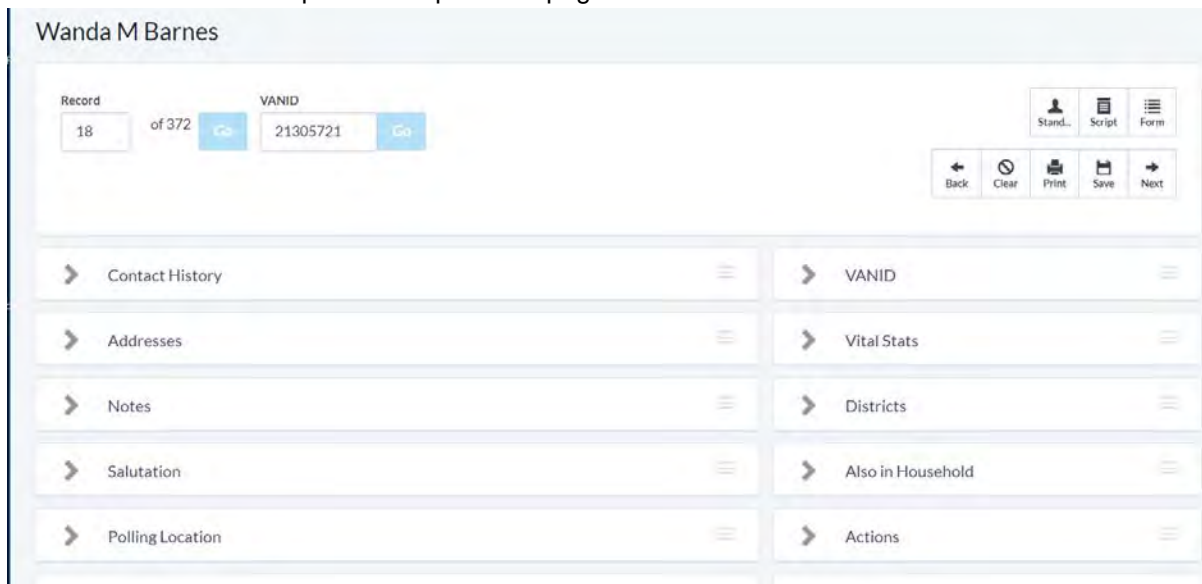
8. You can click on any of the toggles signs to expand that box and get more information about the voter. For example, toggling Address expands to:
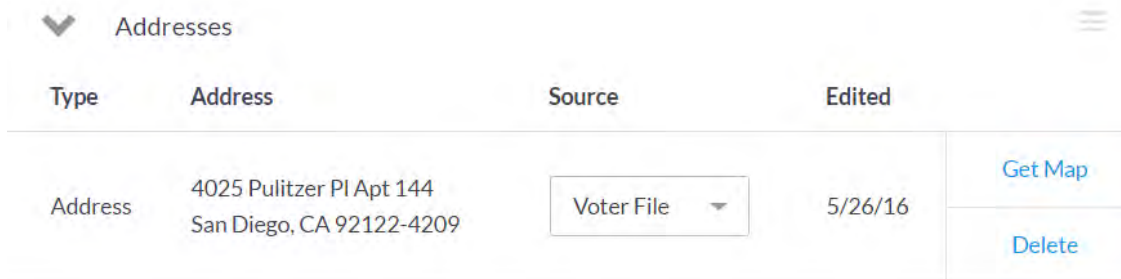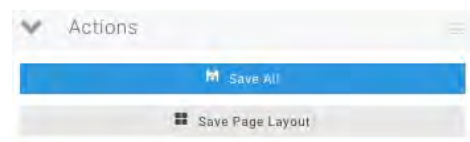

9. TIP: You can rearrange the boxes into your preferred order by grabbing the handle and moving the box to where you want it located:

10. TIP: If you find that you are frequently opening the same information boxes, open them and then click **Save Page Layout** to have them be open as a default.

2.3   Updating an Individual Voter's Information

The most common changes you will make to an individual voter's information are made when entering data after canvassing or some other form of data collection. You may also make changes to an individual record:

- Adding/correcting an address
- Adding/correcting a phone number
- Adding an email address

- Marking the individual as deceased

- Adding a note

1. Start by looking up the individual via **Quick Look Up**, selecting a name from **My List**, or selecting the name while loading data.

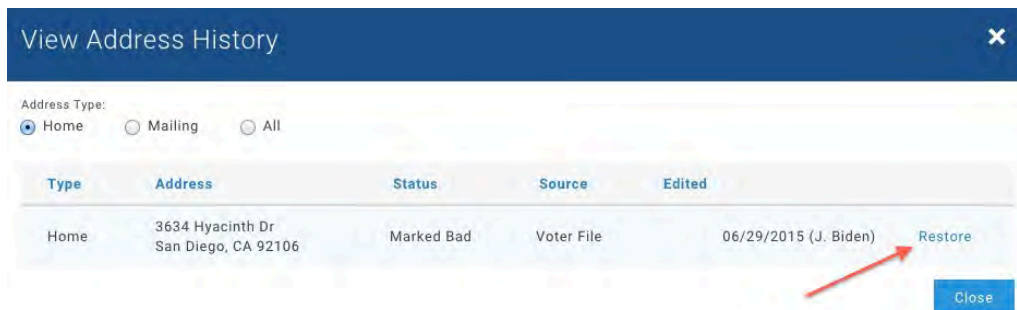2. To mark an address as bad, use the delete button:

3. If you make a mistake, you can restore the address for the first 24 hours after it is marked bad:

4. Users with the security function **View Address History** will also be to restore an address beyond the 24-hour window:

If you need assistance and do not have this function, contact SDCDP for help.

5. To add/correct a phone number, pull down the menu to indicate the type of phone, then enter the number and then, be sure to click the **Save New** link:

6. To mark an existing phone number as bad, click the **Delete** link after the phone number:

7. If you make a mistake, you can restore the phone for the first 24 hours after it is marked bad:

8. Generally, VoteBuilder does not have email addresses for voters. To add an email address, used the dropdown to select the type of email, add the email address and then click the **Save New** link:

9. If the individual has an email address that they tell you is no longer valid or that has bounced, you will click the **Delete** link (you may need to scroll to see it):

10. You will find a voter's party, gender, date of birth and age, permanent absentee status, date of registration and other information in the Vital Statistics box. To mark an individual as deceased, click the **Deceased** box:
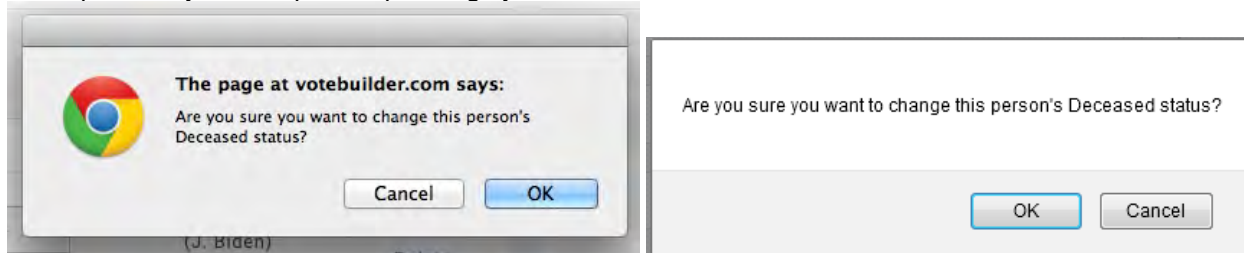
You will immediately be asked to confirm that you want to do this – the appearance of your popup window will depend on your computer, operating system, and browser:

11. Please refrain from using **Do Not Walk** and **Do Not Call** in the Vital Statistics as these impact the national database and are not limited to your committee:

   Tip: Create your own activist code "Do Not Contact".
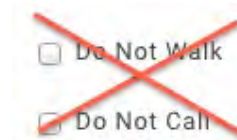
12. To add or delete an **Activist Code**, use the pulldown menu to select the code and be sure to click the **Save New Code** link:

2.4   My List

VoteBuilder uses the term **My List** to refer to the current list you are working with. My List can be accessed from the Main Menu page. You can only have one **My List** in **My Voters** at a given time and there are number of things you can do with **My List:**

- Create and refine it

- Print it
- Create Letters or Labels
- Use it to make calls or send it to a virtual phone bank so many people can call from it
- Export it to Excel
- Send it to a mobile device (iPad, iPhone, Android)
- Run counts/crosstabs to analyze the list
- Cut it into smaller turfs
- Print a map
- Add members of the household to the list
- Save the list or the search used to create it for future use
- Send it to the Grid or Script view to add data using a script
- Send it to bulk upload for adding campaign specific information
- Copy the people into My Campaign

The most commonly used functions are included in this document, others can be found in the Help Wiki.

3   Creating a New List

Lists you create can be very simple or very complex depending on the criteria you specify.

1. On the Main Menu page, click on **Create a New List**:
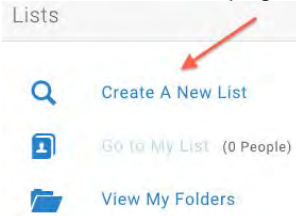
2. Your committee should have access to all of the voters in your district. To create a list of your complete district, click the **Run Search** button without making any other changes:
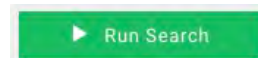
3. For most districts, this list will be too large to work with and many of the functions available will have light grey icons:
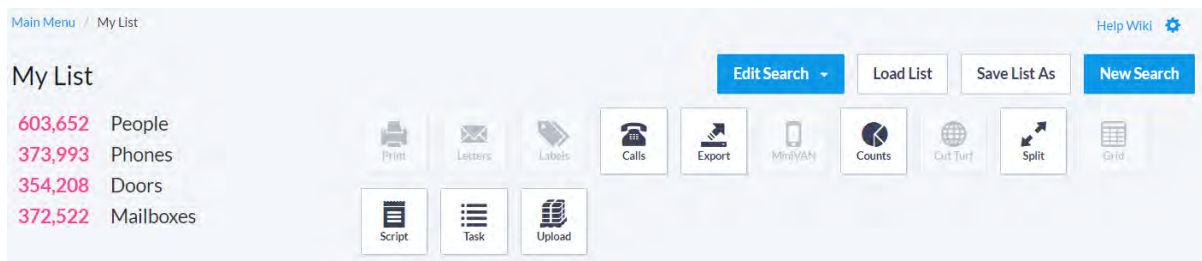
4. To refine the list to meet your own criteria, you will use one or more of the "information boxes" on the left side of the page specify details to include/exclude in creating the search. There are numerous options; listed alphabetically (not all are shown here).

5. As you build your search, the criteria will be shown in the right hand summary (some criteria are preset for you: excluding those who Voted early, only considering Registered Active Voters and suppressions for Deceased, moved, etc.):
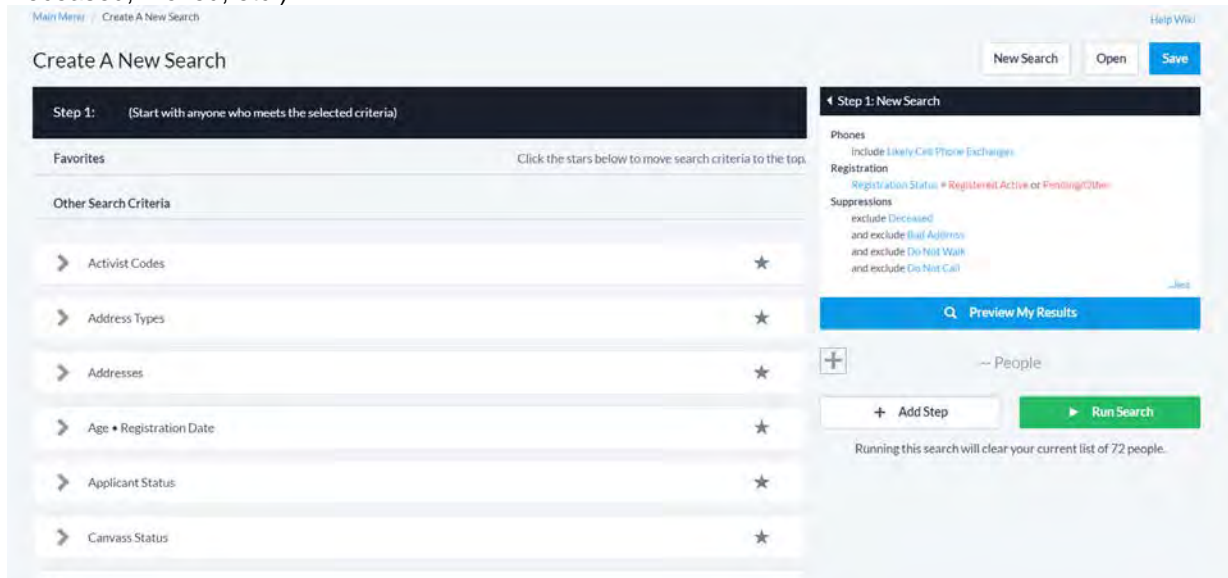
6. Each criterion can be expanded using the toggle arrow to show your option. The **Location Districts** option is used for Congressional and State Legislative districts:
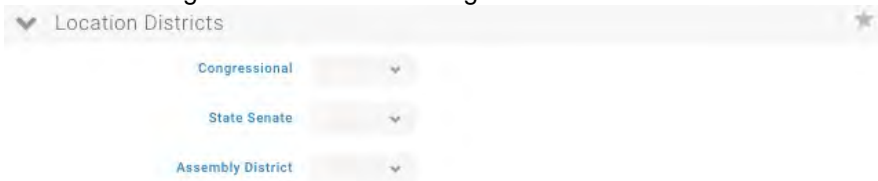
7. When criteria have been selected within an option and the option is toggled closed, the section will show as outlined. You can see below there is an option selected in Location:
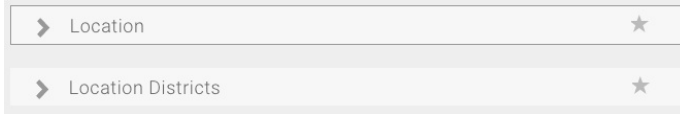
8. The **Location** criterion is used for campaigns other than Federal and State offices. To get to those, you must first use the **County** pulldown menu to select San Diego:
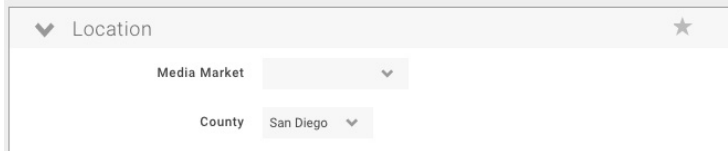
   Note, if your district crosses county lines, you should have access to voters in both counties but the level of detail may be less for voters outside of San Diego County.

9. After San Diego is selected as the county, the **County Supervisor District, Precinct, Municipality, Educational**, and other districts will be revealed:

10. We also have some SDCDP custom locations: Regional District and Community District are used by the GO Team. Neighborhood is the Neighborhoods provided by the San Diego County Registrar of Voters. Consolidated precinct appears and is used only after the ROV has specified polling locations and varies for each election.
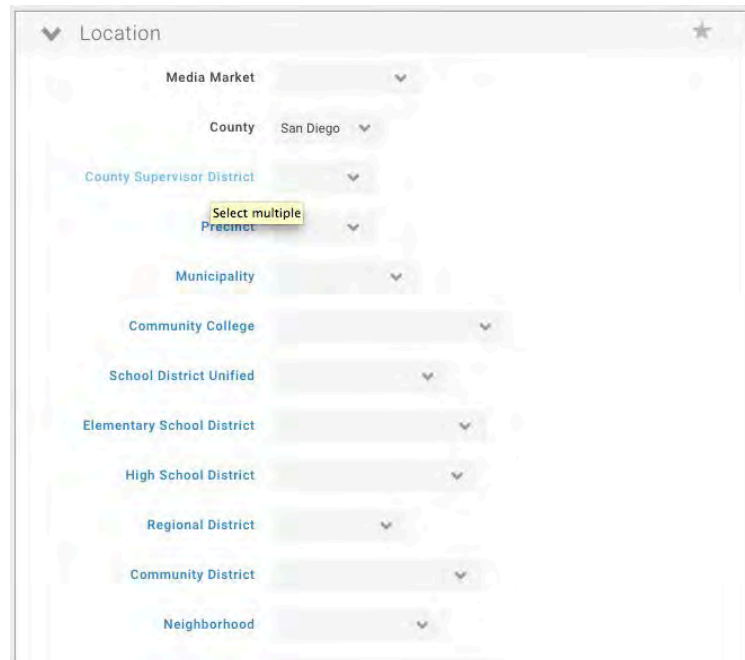
11. You can star your "favorite" criteria and then drag and drop them in the order you like best at the top of the page so they will always be there when you go to create a list:
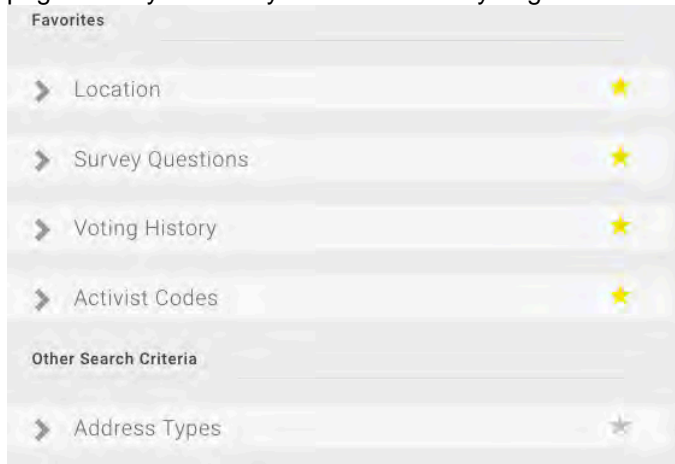
12. As you are building your search, you can preview the results – that enables you to easily change criteria to meet your needs:
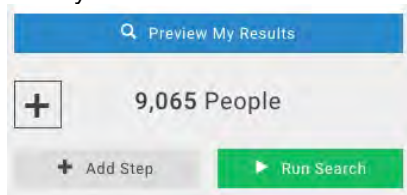
13. As you build your search, you can add steps to your initial search to add, remove, narrow, or household the search:
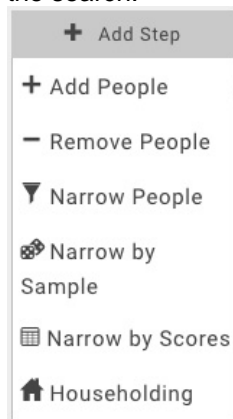
14. Once you have entered all of your criteria, click the run **Search** button to create the list:
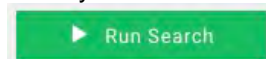
15. When your search is completed, you will now have an active **My List that** you can work with:

16. If you still see gray icons, it means your list is still too large to use that function (e.g., print or cut turf). Add more criteria until you have a list that is small enough.

17. To see the description of the criteria involved in creating your search, click on the Description box from the My List page. If you have used multiple steps to create the list, each step will be shown:

3.1   Editing Searches and Adding Steps

By effectively combining your search criteria and steps, you should be able to create highly targeted lists of voters to contact.
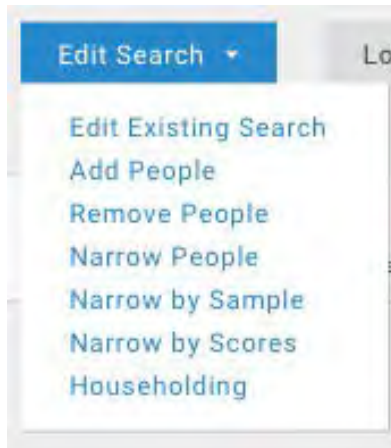
Edit Existing Search brings you back to the current step to refine your criteria.

Add People brings you back to the search screen with a new step to increase your list. Note that this does NOT remember your earlier filter so if you had searched for men age 30-50 in precinct 137500 and then Added women age 30-50, you would get all women since you didn't specify the precinct in the Add.

Remove People brings you back to the search screen with a new step to decrease your list by taking out people who meet a certain criterion (e.g., remove all voters who did not vote in the 2008 presidential election).

Narrow People brings you back to the search screen with a new step to limit your list to people who meet a certain criterion (e.g., keep only voters who voted in the Primary 2012 and Primary 2010).

Narrow by Sample reduces the list to a number of people you set based on a random sample of those people.

Narrow by Scores reduces the set of people to a list size you specify based on one of the available Scores.

Household will give you criteria that provide numerous householding options.

Select the kind of step you want to add from the dropdown list you'll be at a screen that looks very much like the first create a new list screen except now you'll see multiple steps on the right-hand side of the screen. Depending on the number of steps you have, you might need to scroll to see the information.
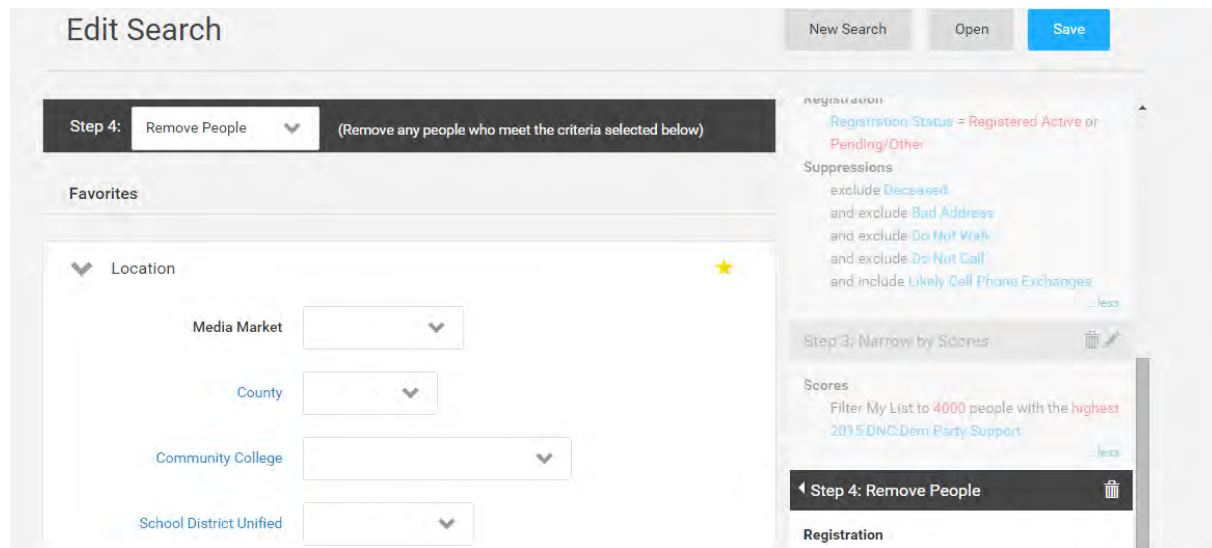
Don't worry if you meant to Add or Narrow you selected Remove, you can switch to it on the next screen via a pulldown:
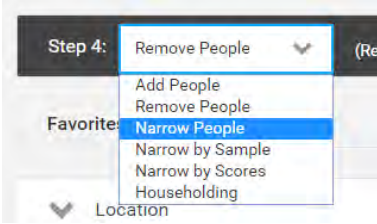
You can edit or remove any intermediary steps you create by using the Delete and Edit icons in the right-hand column.
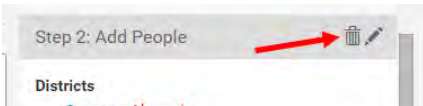
3.2 Search Criteria – Additional Options and Details

Criteria we have found campaigns commonly use are shown with examples. Locations are shown first and then other criteria are shown alphabetically. There may be other criteria available in addition to what is shown.

3.2.1 Locations: Precinct

Many campaigns choose to work with precinct as a criterion. You must first select County and set it to San Diego to reveal our precincts. From there you can pick one or many precincts.

1. If you only want one precinct, use the **Precinct** pulldown menu precinct:

   NOTE: once the precinct is selected, it may take some time to load. If you get the wrong precinct, you can pull down the menu again and select the blank entry to reset it.
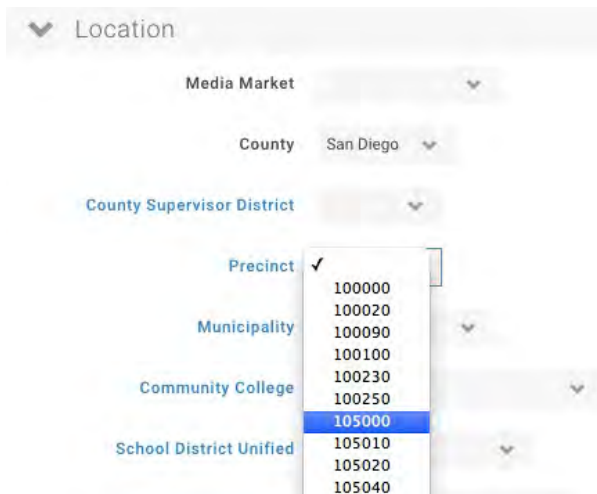
2. Alternatively, if you want multiple precincts, click on the word Precinct and then list of all precinct will be the next page (give it time to load):

3.2.2   Locations: Street Name

You can put a single street name in the Street Name box in the Locations section or you can pick streets within a precinct.

1. To access the street names within a precinct, first pick the precinct, and then the Street Name link will be highlighted. Click on the Street Name link to get to a list of the individual streets in the precinct.

2. For each street, the number of people on the street who meet your criteria will be listed and you can select specific streets.

3.2.3   Locations: Neighborhood

SDCDP has added the Registrar of Voters **Neighborhood** to the Locations section. This is very effective within the City of San Diego and in the Unincorporated areas. The ROV does not provide a neighborhood breakdown for municipalities other than San Diego. As of this writing, municipalities other than San Diego are shown in all caps.
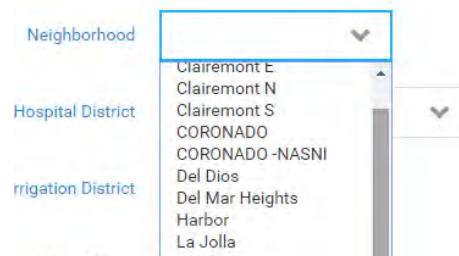
3.2.4   Locations: Municipality and City

SDCDP has added **Municipality** as a pull-down option to the Locations section. This differs from the City field which is the City name used by the US Postal Service and where you enter the name of the City used on envelopes. This distinction is very important for areas that are unincorporated that use a City name for USPS purposes.
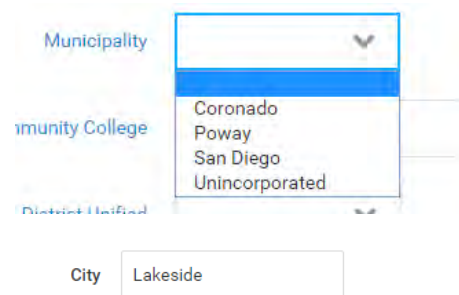
3.2.5   Activist Codes

Activist Codes include data that has been supplied to you by SDCDP or other campaigns or through your own contact with voters. When using the Activist Code pulldown or selecting multiple codes from the picker by clicking the Activist Code link, you will see your own codes and any public codes that were created by SDCDP. You can use these codes in creating targeted lists. If your committee's name is in the parenthesis,

this activist code is private to your committee:
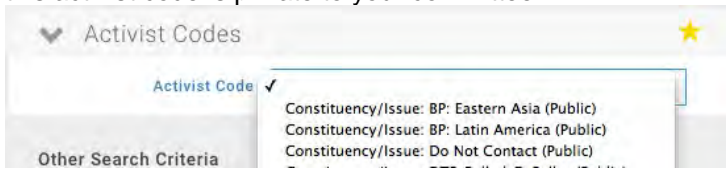
3.2.6 Address Types

Address Types are very helpful for identifying areas that are or are not walkable (e.g., gated communities or locked apartment buildings).

TIP: You may want to set an upper limit on units to eliminate large complexes. Setting buildings to 3 or more units will include duplexes.
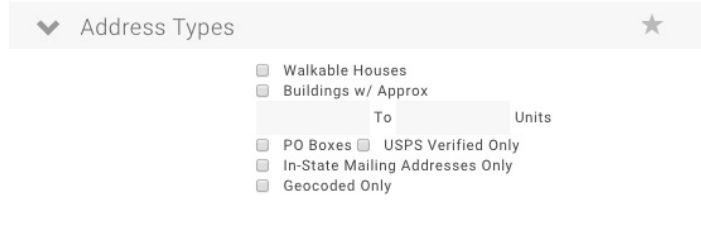
3.2.7 Age • Registration Date

The **Age • Registration Date** section allows users to search for voters based on age or registration date. To search by age, enter in an age range in the boxes provided. In order to enter a registration date, click inside the box to bring up a calendar and select a date on the calendar to choose a registration date. You can leave the "to" box blank.

NOTE: Since the ROV only releases data once a month, VoteBuilder is always slightly behind the actual registrations. Check with SDCDP to determine the most current registration dates.
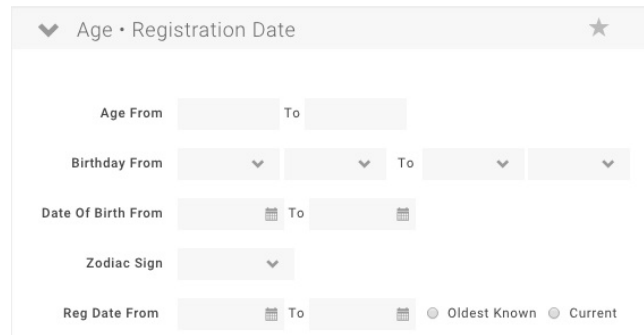
3.2.8 Canvass Status

Once your committee has your own canvass data, you may want to include/exclude voters based on canvass status.

We recommend excluding anybody who has Refused to respond or Refused Contact.
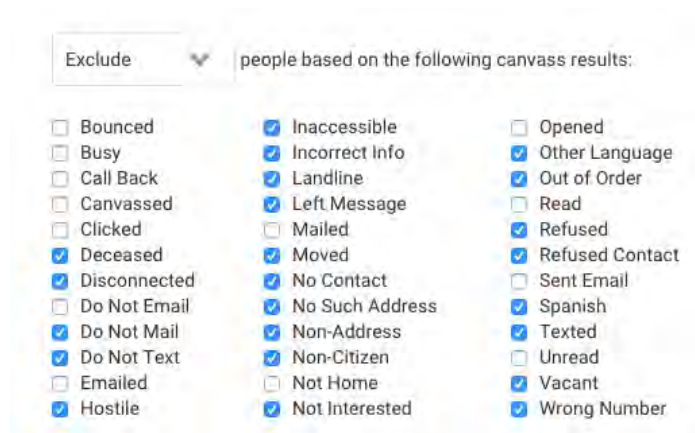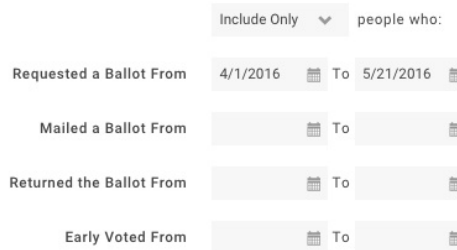
3.2.9 Early Voting

The Early Voting criteria become especially important as the election approaches. You want to make sure to exclude people who have already voted so they are not contacted again.

This box will be automatically checked for you. You will need to uncheck it if you are trying to determine who has voted.

To identify voters who have requested ballots, independent of their permanent absentee status, check for Ballot Requested dates. These are loaded beginning a few weeks before early voting begins and up to a few days before the election as the ROV releases the information to us to include.

3.2.10 Household Party Counts • Household Sex Counts

The household counts allow you to specify more about the households – this is helpful if you want to limit households to a certain demographic combination.

In the sample, this would limit the search to households with exactly two voters where one is a Democrat and one is a Republican:

3.2.11 Likely Ethnicity, Ethnic Subgroups, Religion

SDCDP has not made use of these; please let us know of your experiences. Ethnicity is based on surnames and, as a result, has mixed reliability for women who use their husband's surname.

3.2.12 My Saved Lists

When you create a list you can save it for future use. You can also share your lists with other users in your campaign. When you have a saved list available you can use to add or exclude voters who are in that list:

3.2.13 Notes

If your campaign is using Notes, you can also search on them with optional criteria of the date of entry, who entered the data, who contacted the voter.

Notes are private to your campaign and can be printed on your walk lists.

3.2.14 Party

You may want to specify which **Party** affiliations to include.

TIP: Consider using the Dem Party Support scores instead of Party registration.
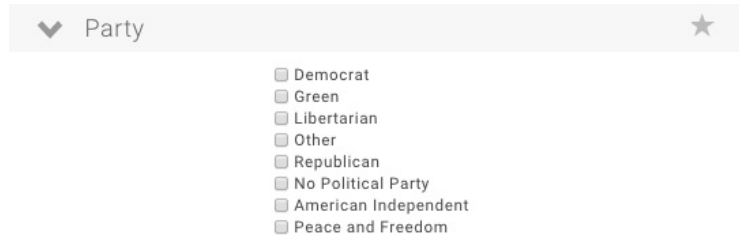
3.2.15 Phones

If you are primarily using **Phones** to contact voters, you may want to set the type and source of phones you are using and eliminate voters with no phones. If you are using robocalls, make sure you are not choosing cell phones

3.2.16 Permanent Absentee

For identifying Permanent Absentee Voters open the Permanent Absentee area in the right column and then check the desired box. You can also use this checkbox to remove all Permanent Absentee Voters when you are doing a drive to register people to vote-by-mail.

☐ Permanent Absentee

SDCDP has provided an alternative to using this checkbox and that is the Vote-by-Mail target which will include voters who are Permanent Absentee, declared Absentee (by the registrar), or opt to vote-by-mail in a given election.

3.2.17 Personal Info: Pace of Birth

Place of Birth has been added and is available via a drop-down menu. This is based on the data the voter provided when they registered.

3.2.18 Relationships

SDCDP has not made use of these; please feel free to add data and let us know of your experiences.

3.2.19 RoboCalls

If your campaign is making Robocalls, you will be able to search on the data.

3.2.20 Scores

Scoring Data is information about a voter that is based on a model. Scores are guesses applied to lots of voters vs. Survey Questions or Activist Codes which are based on data collected through direct voter contact. Scoring data typically takes the form of a number from 0 to 100. You may have different scores available to you from what is shown in this sample

3.2.21 Self-Reported Race/Ethnicity/Language

SDCDP has not made use of these; please feel free to add data and let us know of your experiences.

3.2.22 Suppressions

Suppressions are automatically applied to exclude certain kinds of data (bad addresses, deceased voters).

To increase the speed of your search, you may want to remove Suppressions as you build a search with multiple steps and only have the suppressions in the final step.

We strongly recommend against the use of Do Not Walk and Do Not Call checkboxes in the Vital Statistics section and hence these suppressions. These are intended for other than political use. Use the Refused contact canvass result or an Activist Code of your own instead to achieve the desired result

3.2.23 Survey Questions

Two survey questions will be created for each campaign: one for candidate ID and one for Yard Sign requests/placement. If your campaign needs additional survey questions, contact SDCDP.

You can specify one or more survey responses as criteria and selected responses to create a targeted list. You can access a single question through the dropdown or all questions by clicking the Question link for the multi-picker.

In the example shown, the selected criteria would yield a list of all voters supporting the candidate who already have a yard sign placed: - e.g. a list of all voters supporting your candidate to call for GOTV or a list of all requested yard signs that still need to be delivered:

After selecting your question(s), make sure you are always looking at the most recent response by checking the box:

☑ Include most recent response only

3.2.24 Targets

Targets can be based on a wide variety of criteria. A feature of Targets is that they can be shown in your reports and in your phone banks.

We strongly recommend using SDCDP's Vote-by-Mail target to identify voters who are either registered to vote-by-mail or required to vote-by-mail in a specific election (as determined by the Registrar for each election):

⌄ Targets   ★
                    ☐ Vote By Mail (Dynamic) : PMV VBM
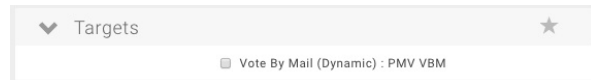
3.2.25 Voting History

Select the combination of the pulldown and the elections that fit your needs to include or exclude voters. San Diego's special elections for 2005 and 2013 are included in the options.

TIP: Consider using the Turnout scores instead of Voting History. This scoring model will give you a better predictor for who votes in Presidential election years and will take into account the voters age, voting history, registration date and many other factors.

3.3   Saving Lists and Searches

Either the list or the criteria used in the search can be saved for future use, modification, or for sharing with another user by using the **Save List As** button:

Edit Search ▾   Load List   Save List As   New Search

1. Saving as a List will preserve the list exactly as it is. Saving as a Search will preserve the criteria so that they can be applied again at a future time: Select between saving the list or saving the search criteria that were used to generate the list, then click the **Save** button to proceed

   ◉ Saved List (Fixed set of People)
   ○ Saved Search (Dynamic set of search criteria)

1. Once you select between saving a List or a Search, additional fields will be shown below your selection.

2. The first choice you must indicate is if it is anew list or a replacement list.

   ◉ New List
   ○ Replace an old List

3. All lists are saved into folders, so the next choice you must make is to select an existing folder or to create a new folder:

   ☑ New Folder

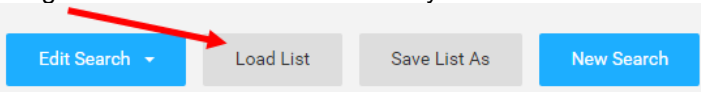   New Folder   October lists

4. The next step is to provide a name for your List or Search and an optional description
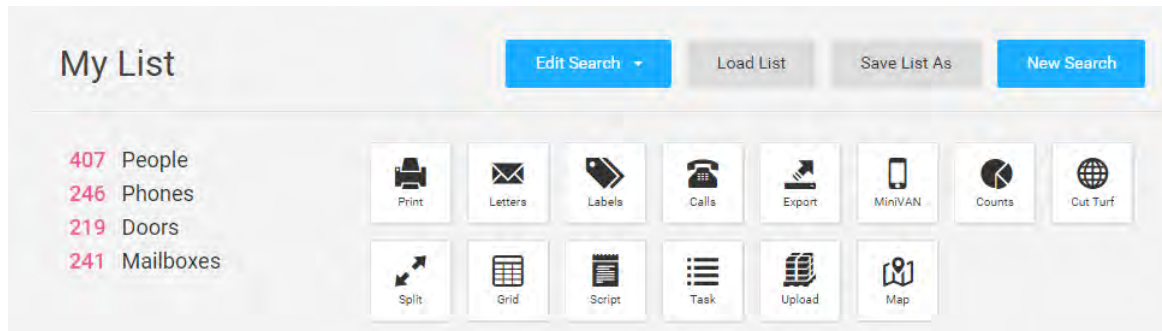
Name * Coronado

Description

3.3.1 Loading Saved Lists

To use an already saved list as My List, you must load the list. This can be done from the My List page by using the Load List button to access your folders:

Edit Search ▾   Load List   Save List As   New Search

4   Using My List

There are a number of things you can do with the list using the icons on the page or the quick navigation

4.1   Printing

In 2010 VoteBuilder changed the terminology from Reports to Print. There are still places where you may see these used interchangeably in VoteBuilder or in the Wiki documentation.

1. From the **My List** page, click on **Print** in the upper left-hand corner of the row of icons.
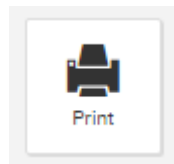
2. You will be on the **Print** page which begins the process to create a printable PDF in a format that you choose.

3. Use the **Report Format** pulldown menu to select the desired layout of the printed format.

    SDCDP will create a report format for your use and set its defaults. You can modify that or create one of your own if the available reports are not meeting your needs. SDCDP also provides some other formats you may find helpful (e.g., Voted and Yard Sign Delivery).

4. The SDCDP provided format will have defaults set for the default script and walking. You can change to any script or contact method you prefer. If you would like the defaults changed, contact SDCDP (e.g. to set it so you always get a map).
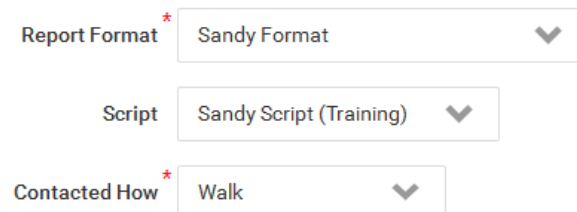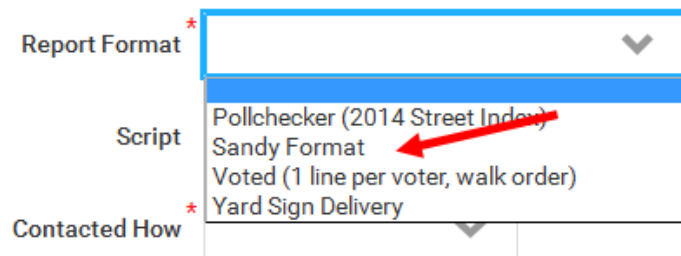
5. It is highly recommended that you create a descriptive **Title** (the date will be automatically included in the footer):

Title List for John Henrique

6. A sorting order is set by the contact method – you can change that as you wish. You can also change the page breaks, by unchecking the boxes until you have it the way you want it.

7. The SDCDP default prints people, a map, and does not create driving directions, and includes the footer. If you want any of the defaults changed, contact SDCDP.

Header Style ○ Single Row
○ Multi Row ☐ Include Field Labels

☑ Print People

○ Print Last Name Range   ○ Print Address Range   ⦿
Do Not Print Range

☑ Print Map ⦿ With markers   ○ Without Markers

Driving Directions ⦿ None   ○ To Turf

☑ Print Footer (List Number, Page Number, and Date Generated)

8. Once **Early Voting** begins, be sure to check or uncheck the **Exclude** box as needed for what you are printing.

☑ Exclude Anyone Who Has Early or Absentee Voted

9. Click **Next** to create your PDF.

Your PDF is being created.

If you have a large list, the PDF creation process may take a few minutes to complete.

While you are waiting, you may do other work with your My List. To check on your file(s) at any time, go to the Main Menu and look for a link that says My PDF Files.

10. Follow the link to **My PDF Files,** select Download File to see the ready-to-print list. You can see how helpful renaming the Title from the default **My List** can be:

PDF Printing Instructions   Download Selected Files

	Title	Type	Created	Created By	File Size	Download Link	Delete
☐	List for John Henrique	List with Map	10/18/15 10:02 AM	Potter, Jerry	356 KB	Download File	Delete
☐	My List	List	10/17/15 8:32 PM	Potter, Jerry	309 KB	Download File	Delete

NOTE: Lists will be available for 30 days.

11. If you selected a script, the first page of your formatted list will show the name of the script you used, the people and door counts, a canvass results key and the survey questions.

    NOTE that the SDCDP default format has options in addition to the canvass result key. If you prefer to have a report format that only shows these options, see the section on Reports for how to create that yourself.

List for John Henrique

Script: **Sandy Script (Training)**
Generated 10/18/15 10:02 AM
People: 407
Doors: 219

Canvass Results Key		
Not Home = NH	**Deceased** = DC	**Non-Citizen** = NC
Refused = RF	**Moved** = MV	**Left Message** = LM
Inaccessible = IN	**Spanish** = SP	**Other Language** = LG

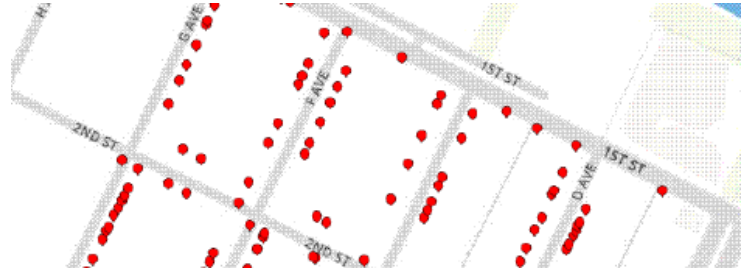A note for the volunteer goes here.

Candidate: Will you support Sandy in the upcoming election?

    Y = Yes
    U = Undecided
    N = No

Action: Would you like a yard sign for Sandy?

    Y = Yes
    N = No
    A = Ask Again
    P = Placed

12. If you selected a Map, you will get a map to use with the list:

13. The default SDCDP walking list will sort by precinct, street, odd/even sides of the street. The title you provided will be at the bottom of every page. Space is provided for recording canvass results and candidate ID. A barcode is included for ease of data entry.
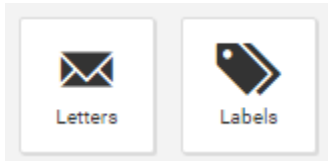

For the purposes of this section, only the SDCDP default report format is shown. See the section on creating report formats to create or modify a format.

4.2 Letters and Labels

Letters and/or Labels can be created from My List. Householding is built-in for these functions.

Before you can use these, you must first a form letter or a label format to use with them. These are accessed via the Admin menu on the main page:

There is documentation in the Wiki that outlines the use of these functions.

4.3 Calls

Using the Calls icon, My List can be sent to several different call services:
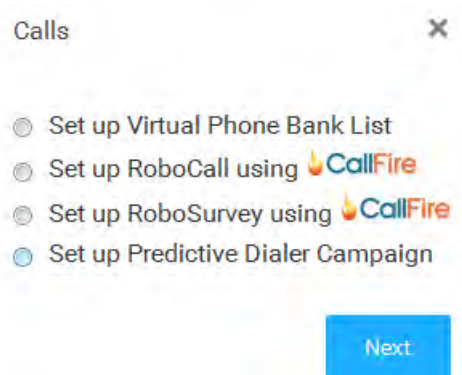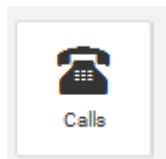
The **Virtual Phone Bank** can be used from either **My Voters** to canvass voters or **My Campaign** to canvass members. See the Virtual Phone Bank section for how to set up this feature. If you have just one person calling a short list, you may want to use either Script View or Grid View directly from My List rather than create a VPB unless you want the added tracking features available with a VPB.

RoboCall, RoboSurvey, and Predictive Dialer are all paid functions. Usage documentation is available in the online Help and Training Guides. Contact SDCDP for more information on how to use these.

4.4   Export
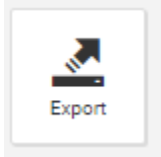
The Export Wizard will allow you to export lists as text or as Excel files with preset or custom criteria. Most Admins will make use of Export to export Householded Mailing Lists or Phone Lists to vendors. There are several other formats available that can be used or, in some cases, customized.

4.4.1   Householded Mail List

1. Select Householded Mailing List from the options for Export from My List. Other residents in the household who did not meet the criteria of your list will not be included.

Export Format * | Householded Mailing List

on Export Type

System Export Formats
- Activist Code List
- Contact History List
- Contact Info Changes List
- Email Blob
- Householded Mailing List
- Householded Phone List
- Notes List
- Standard Text
- Survey Responses List

2. Select from the options and give your list a name:

Householded Mailing List
One record for every mailable household in your list, including just the fields you need to prepare a mailing

Householding | Include one record per address

Household Label | The Smith Household

Middle Name | Do not include middle names

- ☐ Include Phone
- ☐ Exclude any uncertified USPS addresses
- ☑ Exclude any out-of-state mailing addresses

Include
- ☐ County
- ☐ Precinct
- ☐ Congressional
- ☐ State Senate
- ☐ Assembly District

File Type   ◉ Excel File   ○ Text File

Export File Name | Mail List 20151019

3. Click the button to Export and then download the file.

4.5 MiniVAN - Export My List

For the purposes of this section, the MiniVAN icon is used to export a list to MiniVAN and assign that list to a specific canvasser.

As you export lists, take care to give them names that will be helpful when you are working with all of your lists and canvassers later.

MiniVAN Export	✕

Canvasser *	Potter, Jerry ✎
List Name *	Coronado 10/18/15 11:22 AM
MiniVAN Campaign *	October Campaign ⌄ Add New

Cancel   Customize   Send Now

4.6 Counts/Crosstabs

Using Counts directly from My List enables you to quickly analyze if the list is meeting your requirements or if you need to further refine your search. Many campaigns use this tool to determine how or how their targeted universe is distributed (e.g., many voters of each party live in each precinct). This is the same functionality that is available from the main menu using Analyze Data – but in this usage you are analyzing your list.

1. Choose from Quick Counts and Crosstabs or using a format.

   If you find you are repeatedly setting up the same Counts/Crosstabs, you should consider creating a format.

Counts   ✕

⦿ Run Quick Counts and Crosstabs
◯ Run Counts and Crosstabs with Format

Next

2. Select the data you want to be shown in columns and rows.

   To select a criterion, select on the small tree icon to reveal your options:

Party   ⬤
    [None]
    ⊟ Data Field
        Age
        General Voting
        Likely Ethnicity
        Party
        Permanent Absentee
        Primary Voting
        Sex
    ⊞ Scores
    ⊞ Targets
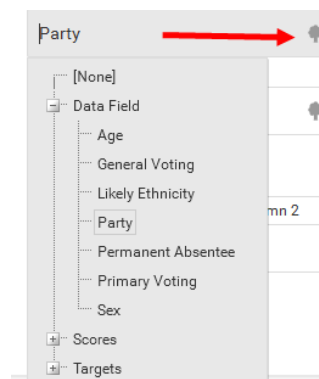
3. This sample uses Precinct as a column with two crosstabs, one for party and secondary crosstab for their vote-by-mail status using the SDCDP target.

		Democrats		No Party		Republicans	
Precinct		**VBM**	**Unknown**	**VBM**	**Unknown**	**VBM**	**Unknown**
105000		153	44	109	34	234	69
105010		6	4	9	7	29	17
105020		123	66	111	60	237	116
105040		106	18	59	21	159	43
105050		79	47	87	56	164	97
105100		96	46	64	53	117	64

Section 1 — Crosstab 1: Party — Crosstab 2: Vote By Mail (Dynamic) — Show Percentages
Section 2 — Crosstab 1 — Crosstab 2 — Show Percentages
Column 1: Precinct — Column 2 — Column

4. This sample uses Precinct only to calculate the number of doors in the universe by precinct which could be helpful for literature distribution.

Column 1: Precinct — Column 2 — Column 3 — Column 4 — Doors from My List

| Precinct	Total Doors
105000	457
105010	36
105020	397
105040	267
105050	275

5. The results can be exported into an Excel spreadsheet.

4.7   Cutting Turf

The **Cut Turf** tool will allow you to easily create and print Google maps according to your own geography showing the location of each door on a turf. For campaigns who canvass by precinct, cutting turf is helpful if the number of voters in the precinct is very large or if the geography of the precinct would be better split.

For campaigns who plan to canvass the same area more than once, you can refresh the turf to include/exclude voters based on the search criteria used when the turf was originally cut. Refreshing will repopulate the drawn map with voters that currently match the universe criteria. This means you only have to cut turf once and then that turf can be refreshed during Early Voting and the final days of GOTV.

1. Create or load the list that you want to cut turf from. From the **My List** page, select the **Cut Turf** icon which resembles the Earth.

Cut Turf
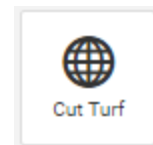
2. The **Turf Cutter** page will display a map of the list with dots representing the households on the list.

3. Click anywhere on the map and then click another place and a line will appear between them: draw a line in the next "corner" of your desired turf and another marker should appear:


4. Make as many clicks/lines as needed to enclose the desired turf. As you click, the color shading shows who will be enclosed. You can also drag any of the squares to pull in markers you have missed.

   Note that if you overlap lines, the voters will be assigned to the first turf where they were enclosed.
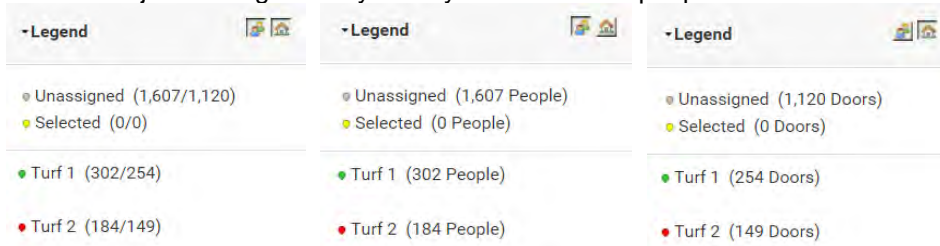
   Click on the starting point to enclose the turf:

5. As you cut turf, the **Legend** on the right hand side of the screen will show the number of Unassigned and Selected doors.
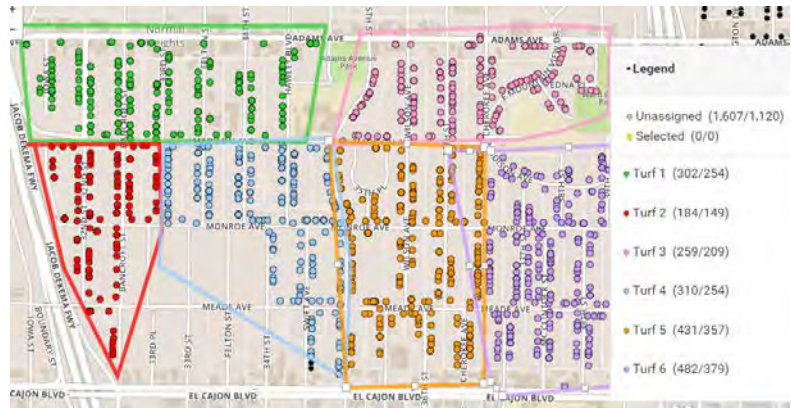
6. You can adjust the legend so you only show doors or people:
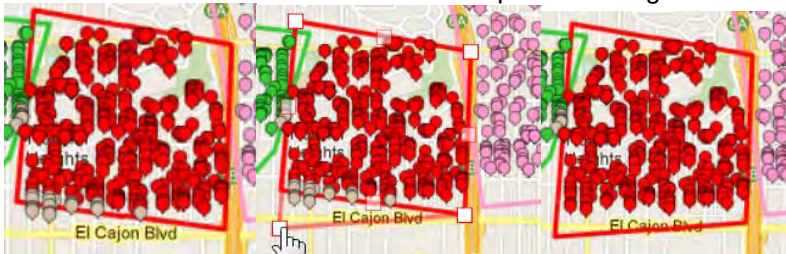

7. If you draw a line in error, you can undo your last action:

8. You can also switch to full-screen mode:

9. If you missed some people/doors, click the name of the turf where you want to include them and then hover over a line of the turf and use the squares to drag the line to enclose the people you missed:


10. As an alternative to drawing turfs, you can use the Wizard to have the turfs auto-cut for you to your specifications. As with the hand drawn turf, the legend will show the names and the numbers of the auto-cut turf. The wizard does not attend to geography and has no knowledge of streets, and in this example has people walking across major streets and the freeway. For this reason, we recommend drawing the turf.
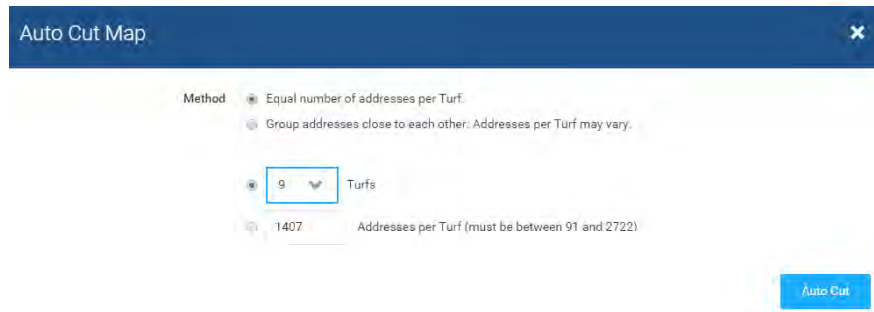
11. As with turf you select, the legend will show the names and the numbers of the auto-cut turf – note that it has no knowledge of streets or geographic barriers and in this example has people walking across major streets and the freeway:
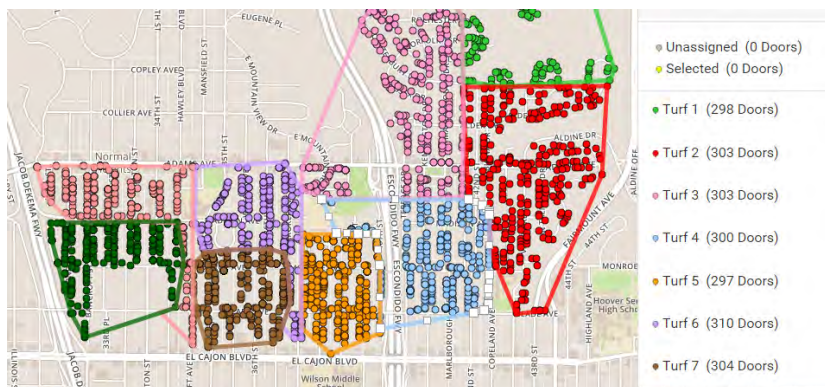
12. When you are happy with your turf, use the Save & Finish button:
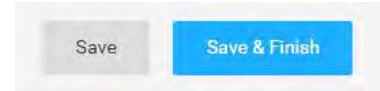
13. The next step is to save the Map Region by specifying the folder (new or existing) and the name of the region:
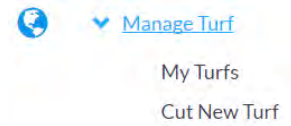
Region Name* University Heights Turf

14. Saved turf will be available in the folder/region you specified:

| ID	Type	Name	Description	People	Owner	Date Created	View Map	Refresh	Print Region	Edit	Status
526374	Map Region	University Heights Turf			Olsson, K.	10/18/15	View Map	Refresh	Print Region	Edit	⌄
782225	Map Turf	University Heights Turf Turf 01		447	Olsson, K.	10/18/15				Edit	⌄
782226	Map Turf	University Heights Turf Turf 02		439	Olsson, K.	10/18/15				Edit	⌄
782227	Map Turf	University Heights Turf Turf 03		431	Olsson, K.	10/18/15				Edit	⌄

15. From the **Folders** page you can:

- Load either the region or any of the cut turfs to be your current My List by clicking on the name of the region or the turf

- View Map of the region

- Refresh the region to include any changes to voters in the region (use gear to add column if missing)

- Print Region which will give you individual maps and lists for each of the cut turf (each list will be titled accordingly)

- Track the status of the turf using the dropdown menu

16. From the **Manage Turf** pages (via Main Menu) you can manage your turfs and also cut new Turfs using either quick actions or icon based sets of options:

⌄ Manage Turf
My Turfs
Cut New Turf

|	Turf	Folder	People	Doors	Last Out/Distributed	
☐ ◢	May 27 Walk (Map Region - 25 Turfs) Created: 5/27/2016 (Nunez, E) Last Refresh: 5/27/2016 10:53 AM 2,212 People 1,753 Doors 155 People / 131 Doors UnTurfed					↻ 🌐 ✏ 🖨
☐	May 27 Walk Turf 01	MAY	114	85	5/27/2016 11:53 AM Printed List #18063361-84763	☰ 📱 ✏ 🖨

4.8   Splitting Large Lists
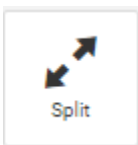
Use the **Split** option to divide a list into portions from 100 to 100,000 without any geographic considerations. The splitter is ideal for breaking up Virtual Phone Bank lists into smaller sizes.

Once split, the split lists will be saved in a folder (similar to cut turf).

| ID	Type	Name	Description	People
782212	List	split lists_0001		100,000
782213	List	split lists_0002		100,000
782214	List	split lists_0003		100,000
782215	List	split lists_0004		39,173

4.9 Using Grid or Script from My List for Canvassing
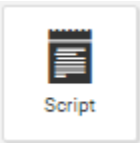
You can go from My List to either Grid or Script view use VoteBuilder to canvass by phone without creating a Virtual Phone Bank. This is a good alternative if you are working with a short list. See the sections on loading data for how to use Grid or Script view. In **My Campaign**, you also have the option of adding the Event Scheduler to the Grid or Script view.

4.10 Upload
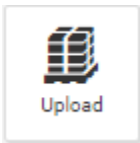
Bulk Upload is enabled for Admin level users. This allows you to add information to My Voters (Survey Responses, Activist Codes) using either the voter's My Campaign ID or State File ID.

See the Wiki for more information on using Bulk Upload.
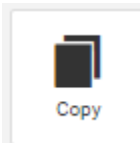
4.11 Map
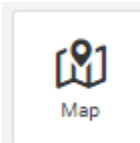
The My List map will allow you to quickly generate a map without printing the associated list. This feature is only available for lists of 2500 and less.

VoteBuilder uses geocodes to map voter locations. This is different from the Get Map function on an individual which runs a google map search of the address.

4.12 Copy to My Campaign

For campaigns using "My Campaign" to manage volunteers and events, you can copy voters from My Voters to My Campaign by using the Copy Icon.

This is a one-time copy – information that is changed in My Voters after the copy, must also be changed in My Campaign.

4.13 Grey Icons in My List

If an icon that is usually available to you is gray, that means your list is too large for the function and you must revise your search to create a smaller list.

5   View My Folders

Folders are used to organize your searches, lists, turfs and regions. As you develop your universes, you will likely have many folders – some of which you will share and others you will keep for your administrative use only.

Any search or list can be loaded as your current **My List**. You access your saved searches and lists, via **View My Folders**:

5.1.1   Accessing Folders

You can access all Folders from the Main Menu page, using the Search bar, or by Quick Navigation Ctrl + / (Mac Users Command + /), or by Load List in the My List page

1. The My Folders page will show your existing folders and any that have been shared with you:

Name	Owner	Created	Description
Group 1	Potter, Jerry	9/14/15	Phonebank lists
July	Potter, Jerry	9/14/15	
List folder	Potter, Jerry	9/14/15	
Sandy Folder	Olsson, Kami	10/18/15	

TIP: use the gear to customize what you see by adding/removing columns.

2. Click on a folder to see what is in it. Each item will be of the type of Search, List, Map Region or Map Turf:

| ID	Type	Name	Description	People	Owner	Date Created	View Map	Refresh	Print Region	Edit
526377	Search	Full universe search			Potter, J.	10/19/15				Edit
781974	List	My list		3,874	Potter, J.	9/14/15				Edit
526374	Map Region	University Heights Turf			Olsson, K.	10/18/15	View Map	Refresh	Print Region	Edit
782225	Map Turf	University Heights Turf Turf 01		447	Olsson, K.	10/18/15				Edit
782226	Map Turf	University Heights Turf Turf 02		439	Olsson, K.	10/18/15				Edit
782227	Map Turf	University Heights Turf Turf 03		431	Olsson, K.	10/18/15				Edit

TIP: use the gear to customize what you see by adding/removing columns.

3. You can a select any name to load that as your current **My List.**

4. You can click on Edit to manage an item. The options available to you will depend on the type of item and whether you are the owner of the item:
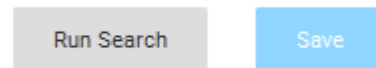
5. You can also do Save as to modify one of your own searches or someone else's. For example, open an existing search and do a Save As:
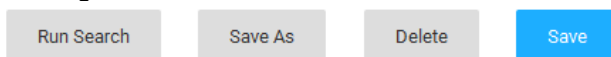
6. Pick the folder and the name for the new search

New Search Name   ✕

Folder

Group 1 ▾

New Name *

July Phonebanks

Save

7. Next click the edit button:

Step 1: New Search

Registration
  Registration Status = Registered Active or Pending/Other

Suppressions
  exclude Deceased
  and exclude Bad Address
  and exclude Do Not Walk
  and exclude Do Not Call
  and include Likely Cell Phone Exchanges

Edit

8. Then edit the search as you wish.

Main Menu > Group 1 > July Phonebanks > Edit July Phonebanks   Help Wiki   Give us Feedback!

July Phonebanks   New Search   Open   Save As   Saved

Step 1:   (Start with anyone who meets the selected criteria)   ◀ Step 1: New Search

Favorites

                                            Registration
                                            Registration Status = Registered Active or Pending/Other

▾ Location   ★   **Suppressions**
                                            exclude Deceased

Media Market ▾   and exclude Bad Address
                                              and exclude Do Not Walk

County ▾   and exclude Do Not Call
                                            and include Likely Cell Phone Exchanges

Community College ▾   ...less

School District Unified ▾   🔍 Preview My Results

Elementary School District ▾   ⊞   -- People

                                              + Add Step   **▶ Run Search**

9. Makes sure you save your changes:

Help Wiki

New Search   Open   Save As   Save

10. You will be able to decide which folders you want each search to appear in. A search can be in multiple folders – this is handy when you want to share some searches with other users:

11. When you are the owner of a folder, you can edit the folder and share it with other **Users**:
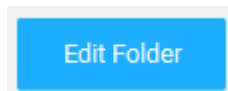
12. You can decide if you want to allow other users to save into your folder and/or who you want to share the folder with either as individuals or as a group:

REQUEST: Please refrain from sharing folders with the SDCDP staff or volunteers unless we specifically ask you to! We can support your committee without you sharing the folder.

13. TIP: By giving a User Group access to a folder, any newly created users who are assigned to the group will get folder access without having to go back to the folder and add them as an individual. See the Users section for how to create User Groups and add users to the group.

5.1.2 Following Lists and Searches

This is a new feature for 2016.

1. You can set a list or a search to be a followed list or search by clicking the green button to the left of the name:

Follow	ID	Type	Name	Description	People	Owner	Date Created	View Map	Refresh	Print Region	Edit	Status
✔ Following	526377	Search	Full universe search			Potter, J.	10/19/15				Edit	▼
+ Follow	781974	List	My list		3,874	Potter, J.	9/14/15				Edit	▼

2. Within any folder, you can specify that you only want to see your followed lists and searches:

3. Your followed lists and searches will show up on your personal dashboard:

6   Customizing for Canvassing

To customize a list or script for canvassing you need to do the following:

1. Decide if you need additional questions beyond survey questions created for your campaign by SDCDP (candidate ID, yard sign). If you need other questions, please let us know.

2. Set up any **Activist Codes** you want to include. SDCDP has set up a Volunteer Prospect activist code for you – this is private to your campaign.

3. Review and revise the script that was set up for you by the SDCDP that includes your Candidate ID and Yard Sign survey questions.

4. A custom report format and several other SDCDP report formats are available for printing walking/calling lists with or without a script. You can modify or create any of these or create a new **Report Format** from the **Main Menu** page for your committee's use.

5. NOTE: Information that you create and data you collect for your campaign – activist codes, survey responses, scripts, report formats – will not be shared with other committees unless you explicitly share it. SDCDP will share relevant information with your committee (e.g., for an endorsed campaign where the GO Team is also canvassing for support).

6.1   How to Set Up an Activist Code

1. Navigate to   Codes • Questions • Scripts

2. Navigate to   Activist Codes

3. If there are any, **Activist Codes** owned by they will be shown in a list:

Type	Long Name	Medium	Short	Scope	Activist
Constituency/Issue	Teacher	Teacher	Tea	Private	☐
1 Activist Codes · 1 Page					

4. To create a new **Activist Code, c**lick the button   Add New Activist Code

5. Complete the form using the following as an example:

6. Note that the **Scope** is set to **Private** which limits the use of this code to your campaign; please do not use **Public** without checking with the SDCDP office. Select if the code is to be available from **My Voters**, **My Campaign**, and/or it applies to **Organizations** (My Campaign).

7. Save your **Activist Code** and you will be returned to the **Activist Codes** page with your new code showing:

Type	Long Name	Medium	Short	Scope	Activist
Constituency/Issue	Retired	Ret	Ret	Private	☐
Constituency/Issue	Teacher	Teacher	Tea	Private	☐
2 Activist Codes · 1 Page					

8. When an Activist Code is no longer needed, click on the Name to edit the code, change the Status from Active to Archived or Inactive, and then click Save:

Status ○ Active ○ Archived ⦿ Inactive

(Archived are available to view, Inactive is completely hidden until the status is changed.)

9. Set the **Committee Access** by adding/removing individual committees. If you have multiple committees, please **do not share** with other committees without first getting their agreement.

6.2   Setup Script to use with a Voter List

A script has already been created for you which you can use as-is or modify. When you set up a script, you will be specifying what questions and check boxes canvassers will see on their walking/calling lists (e.g., "Do you support …?"). The script will correspond directly to the way data will be entered after the canvass.

1. Navigate to   Codes • Questions • Scripts

2. Navigate to Scripts

3. If there are any Scripts owned by your committee, they will be shown in a list:

Name	Description	Created By	Date	Active
Sandy Script (Training)		Kami Olsson	2/20/12	■
1 Scripts · 1 Page				

Note: You may have visibility from the Print and data entry pages to scripts owned by the SDCDP that you are not allowed to edit.

4. Click the button   Add New Script

5. Complete the form using the following as an example:

Name	
Name	Sandy Script (Training) *
Description	
Status	⦿ Active ○ Archived ○ Inactive
Database	My Voter File
Owner Committee	SDCDP Training ▾

6. Click **Next** and you will be directed to the Edit Script page. Complete the Add Script Element section for the introductory Text directed to the volunteer, the Survey Question(s) to ask the voters, and any Activist

Code(s) to record information about the voters. For each element you want to add, click Add:

Add Script Element

Text		Add
Survey Question	[▾]	Add
Activist Code	[▾]	Add

7. Complete the form using the following as an example:

Preview

≡	Text	A note for the volunteer goes here.	Delete	Edit
≡	Survey Question	Will you support Sandy in the upcoming election? • Yes • Undecided • No • Unknown	Delete	
≡	Survey Question	Would you like a yard sign for Sandy? • Yes • No • Ask Again • Placed	Delete	
≡	Activist Code	Veteran	Delete	
		Save		

8. Complete the checkboxes for the options you want to show in data entry:

Phone Results
- ☑ Busy
- ☑ Call Back
- ☑ Deceased
- ☑ Disconnected
- ☑ Inaccessible
- ☑ Left Message
- ☑ Moved
- ☑ Non-Citizen
- ☑ Not Home
- ☑ Other Language
- ☑ Refused
- ☑ Spanish
- ☑ Wrong Number

Walk Results
- ☑ Deceased
- ☑ Inaccessible
- ☑ Left Message
- ☑ Moved
- ☑ Non-Citizen
- ☑ Not Home
- ☑ Other Language
- ☑ Refused
- ☑ Spanish
- ☐ Vacant

9. Makes sure you have made the script available to your Committee in the Committee Access section or you will be the only one who can see it! If you have access to more than one committee, you can set the Committee Access by adding/removing individual committees.

10. Save your Script and you will be returned to the Scripts page with your new Script showing:

ID	Name	Description	Created By	Date	Active
30847	August Script	Script to use in the Month of August for Olga Diaz Support	Julian Quinonez	7/30/08	■

1 Scripts · 1 Page

11. When a Script question is no longer needed, click on the Name to edit the question, change the Status from Active to Archived or Inactive, and then click Save:

Status ○ Active ○ Archived ● Inactive

(Archived are available to view, Inactive is completely hidden)

12. To attach the Script to a report or a Script View for data entry, use the pulldown menu and specify the name of the script. For example:

Print Report

Report Format	Calling List ▼ *
Script	August Script ▼
Source	Calling ▼ *

Script View

Script	Sandy Script (Training) ▼ *
Canvasser	Training, Admin
Date Canvassed	7/8/12 ▦ *

13. This is a sample of the Script and codes that would be shown (it will show either a walking results key or a calling results key – there is no combined key):

Script: **Sandy Script (Training)**
People: **334**
Doors: **271**

Canvass Results Key		
Not Home = NH	**Deceased** = DC	**Non-Citizen** = NC
Refused = RF	**Moved** = MV	**Left Message** = LM
Inaccessible = IN	**Spanish** = SP	**Other Language** = LG

A note for the volunteer goes here.

Candidate: Will you support Sandy in the upcoming election?

Y = Yes
U = Undecided
N = No
U = Unknown

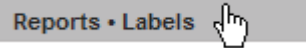**Action:** Would you like a yard sign for Sandy?

Y = Yes
N = No
A = Ask Again
P = Placed

14. TIP: If you want to suppress the Canvass Results Key, have one script for canvassing without any results checked and another script for data entry. That does mean your data entry people will need to switch scripts but it may be less confusing for your canvassers if you are using a report format that spells out Moved, Not Home, Refused.

15. When a script is no longer needed, you can set it to Archive or to Inactive to remove it from your list.

6.3 Building on an Existing Report Format

We'll provide you with a basic report format customized for your campaign. You can use that as is, or use one of our other provide formats, start from fresh or copy a different format and modify the report as you see fit.

1. Navigate to Reports • Labels

2. Select the name of the report you want to copy from the list by clicking on its name:

Name	Orientation	Owner	Shared
Pollchecker (Street Index)	Portrait	Olsson, K	■
SDCDP Campaign (Large Font)	Landscape	Olsson, K	■
SDCDP Campaign (Short Script)	Portrait	Olsson, K	■
SDCDP Campaign Call List	Portrait	Olsson, K	■
SDCDP Campaign Walk List	Portrait	Olsson, K	■
5 Report Formats · 1 Page			

3. The Edit Report Format screen will show the current name, type in your own name and then click the Save As button:

4. Your new report's name will show in the list, click on the name so you can modify it:

Name	Orientation	Owner	Shared
demo	Landscape	Training, A	☐
Pollchecker (Street Index)	Portrait	Olsson, K	■
SDCDP Campaign (Large Font)	Landscape	Olsson, K	■
SDCDP Campaign (Short Script)	Portrait	Olsson, K	■
SDCDP Campaign Call List	Portrait	Olsson, K	■
SDCDP Campaign Walk List	Portrait	Olsson, K	■
6 Report Formats · 1 Page			

5. You can make layout changes, add space for a script, and edit the information that is shown. To edit the information, click the Edit button at the end of the sample shown:

6. Jump ahead to step 7 of the next section on creating a new report and continue from there.

6.4   Creating a Report Format

1. If you don't want to modify an existing format, you can start from scratch.

2. Navigate to   Reports · Labels

3. Navigate to   Report Formats

4. Click the button   Add New Report Format   to start from scratch.

5. Complete step 1 using the following as an example:

Name your custom format and choose layout options.

Name	August Canvass Format *
Description	
Page Size	○ A4 ○ Legal (8-1/2 x 14) ◉ Letter (8-1/2 x 11)
Orientation	◉ Portrait ○ Landscape
Text Size	8 ▼
Rows	4 ▼
Width	◉ Full Page ○ Columns 2 ▼ ☐ Multicolumn Repeat
Show Notes	○ No ○ Yes

Next

NOTE: You can increase the text size or number of rows later if you find this is not enough.

6. Specify the number of rows you want for your **Script** which will depend on the number of **survey questions** and **activist codes** in the script (short for 1-3, medium for 4-6, long for 7-9, huge for 10-20 – about half the width of the page):

Select the amount of space you want to reserve for a script.

Script Size
◉ Leave no room for a script
○ Reserve room for a short script
○ Reserve room for a medium script
○ Reserve room for a long script
○ Reserve room for a huge script

Previous Next

7. The Report Formatter is a drag-and-drop screen that allows you to edit the information that will be shown for each voter on your list that is being canvassed. You will drag/drop fields from the **Available Fields** to the grid section. You can also use the **Add Column** button to create additional columns to drag the **Available Fields**:

Report Format Builder
August Canvas Format

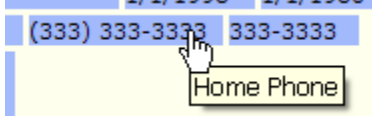Place fields on the grid below to build your report.

Reserved for Script

Add Column Clear Save

Available Fields

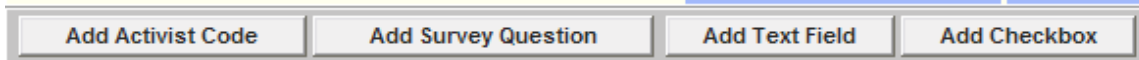| 12345678	Ali	Nikseresht	Ali Nikseresht	Nikseresht, Ali
Nikseresht, Ali P	6 Ceradon Cir	Chicago	Chicago 00000	
Chicago, IL 00000	6 Ceradon Cir	Chicago	Chicago 00000	
Chicago, IL 00000	1/1/1998 1/1/1980 27 M D Washington	Washington Heights	12 20 2	
(333) 333-3333 333-3333	(333) 333-3333 333-3333	(333) 333-3333 333-3333	123 (333) 333-3333	
ali@myemailaddress.com	Y BARCODE	1/4 1/4 WaterVille Fire Station		
		314 Main St.		
		Somerville	Salutation	

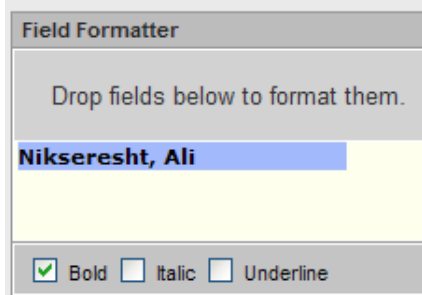Add Activist Code Add Survey Question Add Text Field Add Checkbox

8. Create additional columns as needed and then use the arrows ( ) to widen/narrow them as you want. If a field will not fit in a column, VoteBuilder will not let you drag it there.

9. Note that there are several fields that look exactly the same. To see what data the field will show, hover your mouse over the field and the description should be revealed:
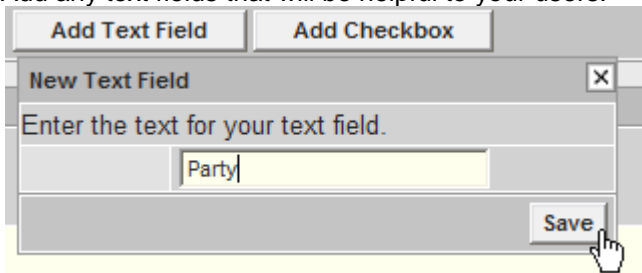
(333) 333-3333   333-3333

Home Phone

10. Use the appropriate buttons to add additional information to the report:

| Add Activist Code | Add Survey Question | Add Text Field | Add Checkbox |

11. Use the **Field Formatter** if you want to change the appearance of any field:

Field Formatter

Drop fields below to format them.

Nikseresht, Ali

☑ Bold ☐ Italic ☐ Underline

12. Add any text fields that will be helpful to your users:

| Add Text Field | Add Checkbox |

New Text Field   ☒

Enter the text for your text field.

Party

Save

13. This sample has the name, phone number, age, gender, party and voting history:

Place fields on the grid below to build your report.

Nikseresht, Ali	27 M	VHG: 1/4	
(333) 333-3333	Party D	VHP: 1/4	Reserved for Script

Add Column | Clear | Save
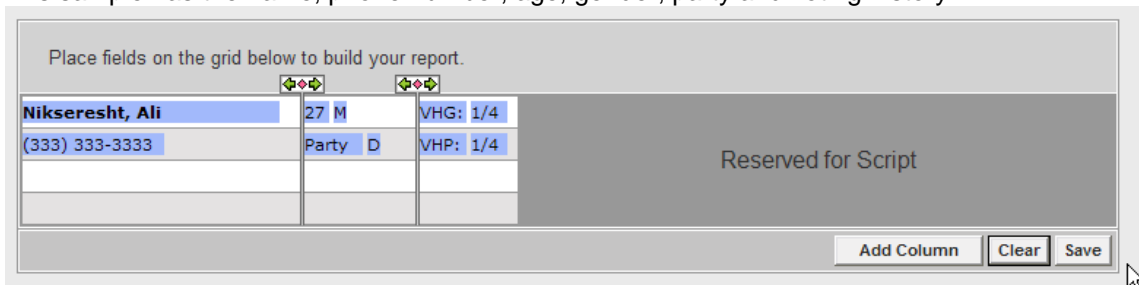
14. Click **Save** and you will see a preview of the output. If you have changes to make, click Edit to return to **Report Format Builder**:

Preview			
Nikseresht, Ali (333) 333-3333	27 M Party D	VHG: 1/4 VHP: 1/4	Reserved for Script
Lavoie, Terry (444) 444-4444	27 M Party D	VHG: 2/4 VHP: 2/4	Reserved for Script
Sullivan, Mark (555) 555-5555	27 M Party D	VHG: 3/4 VHP: 3/4	Reserved for Script
Cotton, Rachel (666) 666-6666	27 F Party D	VHG: 4/4 VHP: 1/4	Reserved for Script
Hristov, Vlad (777) 777-7777	27 M Party D	VHG: 2/4 VHP: 2/4	Reserved for Script
Porter, Christopher (999) 999-9999	27 M Party D	VHG: 3/4 VHP: 3/4	Reserved for Script
			Edit

15. If you have created a report that is strictly walking or calling, or you want to change the sort ordering you can set the defaults using **Set Print Defaults**:

   ⚙ **Set Print Defaults**

   TIP: this is helpful if you want a calling list, but prefer that it be sorted alphabetically or address rather than by phone number.

16. Set the **Committee Access** at the bottom of the page by adding your committee name or you will be the only one who can see it.

17. **Save** your **Report Format** and you will be returned to the Report Formats page with your new code showing:

Report Formats   Add New Report Format

Name	Orientation	Owner	Shared
August Canvas Format	Portrait	Rivera, S	
Calling List	Portrait	Sullivan, M	x
Default Campaign Call List	Portrait	Quinonez, J	x
Defaut Campaign Walk List	Portrait	Quinonez, J	x
Walking List	Landscape	Sullivan, M	x
5 Report Formats · 1 Page			

18. When a Report Format is no longer needed, click on the **Name** to return to the **Edit Report Format** page and then click **Delete**:
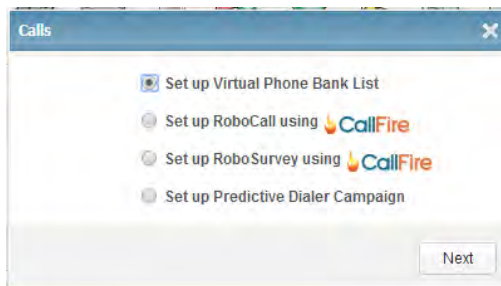
   🗑 **Delete**

7.1.1   Setting up the Phone Bank

1. To set up the Virtual Phone Bank, your committee must have a Script already created.

2. The easiest way to set up a phone bank list is to create a list with the desired criteria, select the Calls icon and button for Set up Virtual Phone Bank:
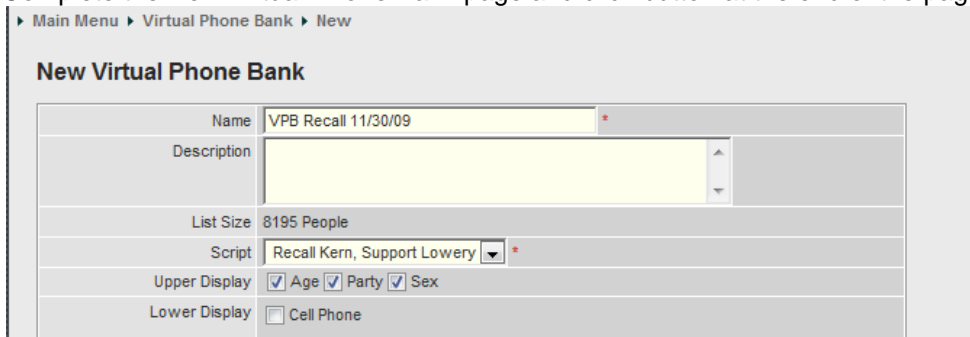

3. Complete the New Virtual Phone Bank page and click button at the end of the page to proceed:

4. Complete the Edit Virtual Phone Bank Page. Note that a VPB Code has been created for it. Click the Save button to proceed:

5. The new entry will be added to the Virtual Phone Bank Lists:

Virtual Phone Bank Lists

Status	Committee		Name	
Active ▾				

Date From	To	User Group		
▦	▦	▾	☐ Show Expired Virtual Phone Banks	

										Remember Me	Refresh

Name	Round	Voters	Attempted	%	Completed	%	Canvassed	%	Voted	%	Start Date	End Date	
donors D2	1	133		%		%		%	N/A	%	1/4/10	1/29/10	Report
Potential Yard Signs	1	1,186		%		%		%	N/A	%	1/4/10	1/29/10	Report
VPB Recall 11/30/09	1	8,195		%		%		%	N/A	%	1/19/10	1/20/10	Report

3 Virtual Phone Bank Lists · 1 Page

7.1.2   Using the Phone Bank

1. Select Virtual Phone Bank from the Main Menu Page:

Quick Tasks

Virtual Phone Bank
Make calls using Virtual Phone Bank
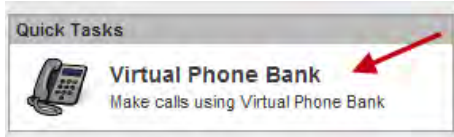
2. Select from the Virtual Phone Bank by name or enter the code you were provided. There may be more listed than what is shown below:

Which Virtual Phone Bank do you want to use?

◯ LightnerCity1
◯ Let me select by VPB Code 2BE81P – 8451

Next

17. Follow the instructions:

Virtual Phone Bank
LightnerCity1

Welcome to Virtual Phone Bank. We'll show you names and phone numbers, along with a script to read. Please call each person and fill in their responses on the screen as you go along.

Next

18. Here's a sample page:

8 MiniVAN

MiniVAN is smart phone/tablet application that gives canvassers access to their voter lists while out canvassing. The lists are exported from VoteBuilder and imported directly into the VoteBuilder-compatible app. Data can then be entered directly into the device during canvasses. This eliminates the need for marking up printed lists and data input having to be done from the markups. The data is stored in the handheld device until all changes and additions are manually synchronized back with VoteBuilder via a Commit procedure.

We recommend that you test the process out with a small sample to make sure you understand how the process works for you before you use it to canvass. We have encountered two problems with using handheld devices to date:
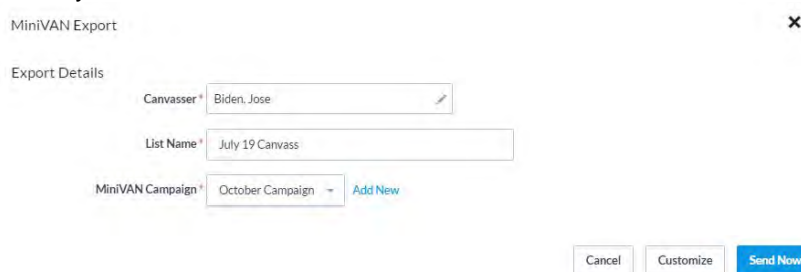
- Canvasser waited longer than 30 days to commit and list had expired
- Canvasser did not commit before Voter File update and was not able to commit after update

Before you can export a My List to MiniVAN, you must first have created a MiniVAN campaign.
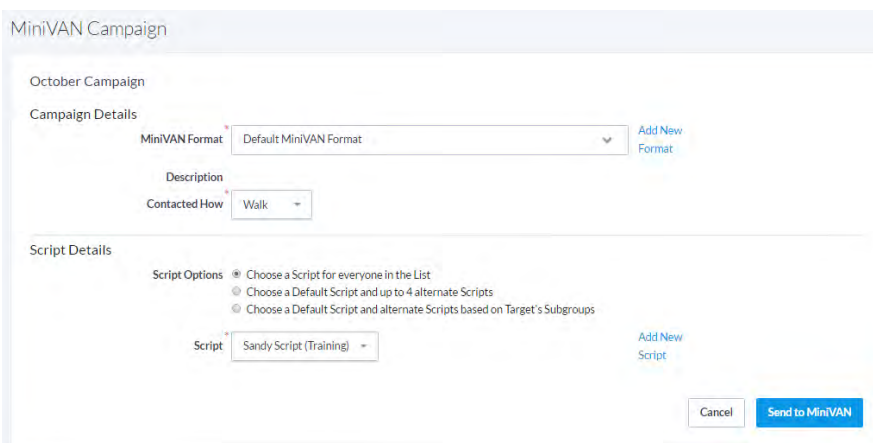
Please refer to newer information in the VoteBuilder online help and Wiki for help with MiniVAN.

8.1.1 Preparing to Canvass on VoteBuilder

1. In My Voters, Create a New List or go to View My Folders and select the list you want.

2. Once you are in the **My List** screen, select the **MiniVAN** icon.

3. A **MiniVAN Export** screen will appear. For **List Name**, fill in a list name of your choice. For **Canvasser**, select your name:

4. Click the Customize button. Select the appropriate script (check with your coordinator if you are uncertain):

5. Click the **Export** button. Your list will be exported to the MiniVAN app. on your device.

9 Loading Data and Analyzing Data

Most campaigns invest in inexpensive barcode scanners to enter their data. There are manual methods as well which are suitable for smaller amounts of data.

9.1 Canvassers

When data is entered, a canvasser name must be supplied. All VoteBuilder **Users** are automatically canvassers for the purpose of entering data – however those are most often not your canvassers!

1. When you load data, you enter the first three letters the name of the Canvasser for the list and then select that name as Canvasser (use a space after Mc and Mac):

2. You can add non-users as canvassers in several different set-up pages by clicking **Add New Canvasser** and following the steps to create new canvassers.

3. You can also create new canvassers via the link in the **VoteBuilder ID** or **My Campaign ID** sections by clicking the **Add New** link:

4. If you do not specify a canvasser, the results will get attributed to Volunteer (not as helpful in analyzing data or for traceability).

5. You can search for a canvasser by name using the Canvasser and User Look Up:

6. There is not currently a way to get a list of all of your canvassers or to search by first name. You can only search for subsets using the first three letters of the last name:

9.2 Loading Data by Scanning Bar Codes

We recommend reading the Wiki article on Bar Code Scanning.

Scan Bar Code will allow you to rapidly enter canvass results using a barcode scanner. It does not matter how old your list is. You may want to pre-print scanning lists for both walking and calling so you have access to all the codes you might want to apply.

1. Select the Load Data option for Scan Bar Codes:

   |||| Scan Bar Codes

2. Complete the form using the following as an example:

Mode	◉ Script ○ Scan Neighbor Relationships
Script	Sandy Script (Training) ▼ *
Date Canvassed	7/8/12 📅 *
Canvasser	Training, Admin 🖉 *
Contacted How	Walk ▼ *
Entry Order	◉ Result First, then Names ○ Name First, then Results

Previous | Next

You can either enter the Result and then each of the Names for that Result, or a Name and then the Result for that name. For new volunteers, it is usually easier to do Name then Results. For experience scanners, they may want to do Result first then all the names with that result, and then restart at the beginning of the list for the next result

3. Download the PDF of your script in barcode format and print it. We recommend printing it for both walking and calling – that way you have all the results options available to you:

Bar Code Report

Candidate: Sandy ID
Will you support Sandy in the upcoming election?

Yes (Y) [SQ90619-388034]

Undecided (U) [SQ90619-388035]

Action: Yard Sign Sandy
Would you like a yard sign for Sandy?

Yes (Y) [SQ90617-388028]

No (N) [SQ90617-388029]

4. As you scan voters, the Bar Code indicator will change from Red to Green and the voter's name will be shown. You will be able to access the voter's individual record by clicking their name (e.g., to enter a note).

Bar Code Data Entry

	Contacted By Training, Admin 🖉 ⚙ How	Date Walk ▼	7/8/12 📅
Person	
Code	

San Diego County Democratic Party

9.3 Loading Data with Quick Mark

Quick Mark is useful if you have a random list of voters (e.g., a sign in from a meeting) and only want to make a single entry for each person on the list. Not all users have access to Quick Mark or to all of its features.

1. From the **Main Menu** page, select **Quick Mark** from the **Load Data** options:
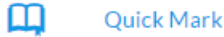
     Quick Mark

2. Step 1 is to specify what you want to do from the options provided. Some users have different options available. Step 2 is to specify the data to be applied and click the **Finish** button when done:
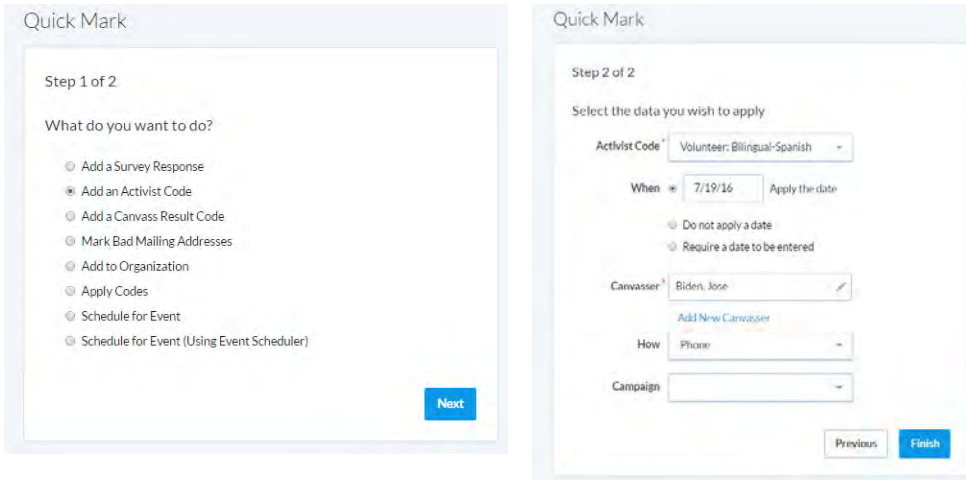
3. Look up each individual you want to **Quick Mark** by entering enough unique identifying information and then clicking the **Search** button:

4. Use **Remember Me** if you want to set a value for all of your searches (e.g., Oceanside):

5. Pick the individual(s) to **Quick Mark** from the search results and then click the **Save** button:

6. You can view the individual's voter information to see the results of the **Quick Mark**:

9.4 Entering Canvass Results/Notes from a List (Grid View)

The **Grid View** method of data entry allows you to enter results a page at a time in the same order they appear on a printed list. The list must be no more than 30 days old. It has a nice feature where you can enter one or two results on a page and then mark the rest of the page as not home. Select **Grid View** from the **Main Menu**:

Script View is an alternative data entry method where you enter results one voter at a time. The setup is very similar to **Grid View**.

1. Enter the number that is at the bottom of the list:

John User's List for 5/5/2012 · List 7573385-82209 · Page 1

and click Next:

2. If you get an Oops, go back and try the list number again, you may have had a typo:

3. If the list is older than 30 days, it cannot be entered via Grid View. You will get a message. Barcode entry is an option and can be done at one of the SDCDP offices:

4. The Script should automatically be supplied from the list number:

5. The name of the person who canvassed the list should be either hand written on the list or at the bottom of the list near the list number. Enter the first three letters of the last name of the person who canvassed the list as the Canvasser (use a space after Mc and Mac):

6. If the canvassed list has the name of the person who canvassed, but no corresponding Canvasser is found in VoteBuilder, then click Add New Canvasser and add the canvasser with their first and last name. Do not worry about the address, phone numbers, email, etc. – it can be added later.

7. Set the canvass date and set Contacted How to Walk (our default printing even if you phoned):

8. Check the box to Include Notes:

9. Click the Next button:
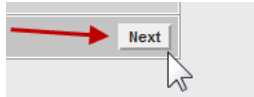
10. The voters should be in the same order as the printed pages. If the voters are not in the same order as the printed page, you may have changed the sort order or selected Phone instead of Walk. On the left side of the grid, you will see voter names and addresses:

11. To eliminate some columns from the grid, use the Change My Settings gear
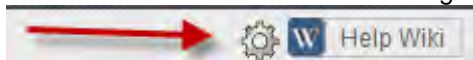
12. Drag and drop to remove columns. Depending on your screen size, you may want to only keep Name:
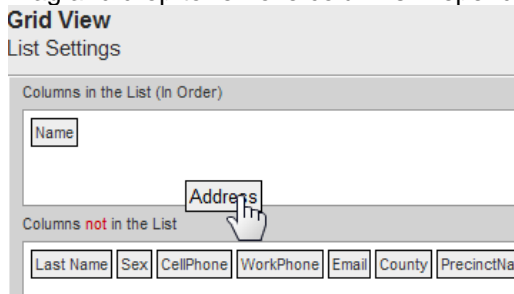
13. Your grid should fit on the screen better with columns removed:

14. If the canvasser called rather than walked the list or if there are phone results to add, change the How to Phone at this point so you can get phone Results options.
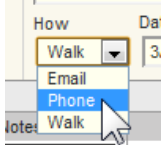

15. If a voter is interested in volunteering, please add a note and email the Community Coordinator to let them know as soon as possible.

16. You may want to visually review each page to for appropriate coding by the canvasser. In particular, if you mark a voter's phone number as bad, the address as no access, or the voter as moved, please be sure to mark all voters in the same household or with the same number accordingly.

17. Use the pull-down menus to either choose a Result or answer the script questions – these are mutually exclusive. You do not need to change Canvasser it will get copied from your set-up. You can also enter Notes for individuals. The columns for candidate IDs will be in the same order as the printed list and will have header for the office (e.g., City Cncl for City Council):


18. Use Flag As (the last column) only for voters who are extremely partisan contrary to their voter registration (Do not mark Dems as Dems or Rep as Rep).

19. To make sure you don't get timed-out by VoteBuilder, you may want to click the Save icon after every few voters.

20. For any individual where you want to access to their individual record (e.g. to enter a new phone number), click their name which is a link to go to their page:

Shabtay, Jeanette
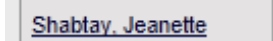
21. To add a new phone to an individual's record, enter the phone number and click Save New:
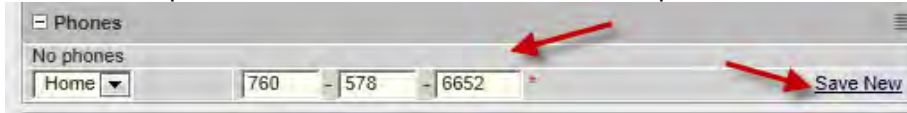
22. If you went to a voter's page, use the navigation path to return to the Grid View:

▸ Main Menu ▸ Grid View ▸ Joseph Shabtay   W Help Wik

Joseph Shabtay
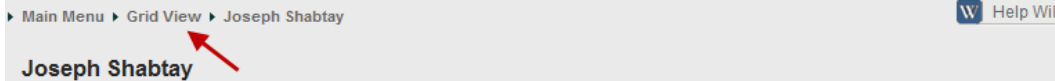
23. If you find that the Results pull-down is unavailable after visiting an individual record, the How may have switched to Email or your Script may not have any results specified. Switch it back to Walk or Phone (whichever you are using):


24. When you have completed all the voters who were canvassed, you can mark the rest of the people on the page as Not Home by using the button at the bottom of the page:

Mark Remaining Not Home
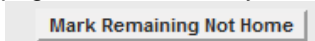
25. When you have completed the page as well as updates to individual voters, click the Save and Proceed icon:

26. You can take breaks during data entry. Be sure to save your work on each page. When you are ready to resume, choose the Grid View and then the button to Continue my work:
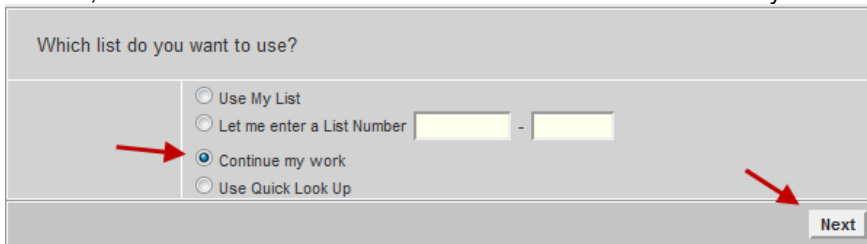

27. To get to the page with the voter where you want to resume, use the VoteBuilderID shown below the barcode in the VoteBuilderID box and click Go:

28. TIP: You can also use Grid View if you are the only person calling a list rather than using the Virtual Phone Bank.

9.5   Entering Canvass Results/Notes from Your List (Script View)

Script View is an alternative data entry method where you enter results one voter at a time. It is especially useful if you only have a few voters to enter data for. You can access Script View from either the Main Menu in the Load Data Column or from an individual record:
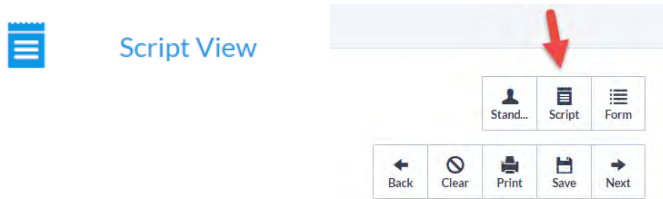

1. If you are working from the Main Menu, you will enter the list number you are working with. You will specify the script you want to use and any settings you want to use. You may need to choose the settings gear and then follow the same set-up steps as with the Grid View to adjust it for data entry:


2. Enter results or IDs from the marked up list using the pull-down menus. Add notes that could be helpful in the future. If you want to flag a voter for follow-up (e.g. wants to volunteer), use **Schedule New Contact** and assign that to the individual you want to do the follow up:
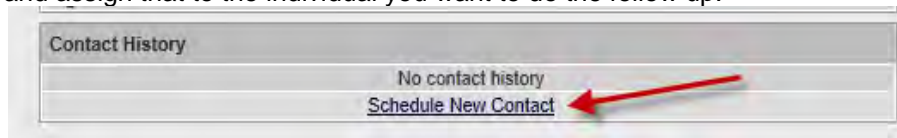
3. To access the individual's record, e.g. to add a phone number, click the **Standard View** icon:
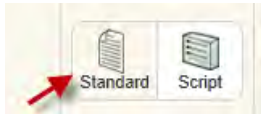

4. After making changes in an individual's record, return to the **Script View** by clicking the **Script** icon:
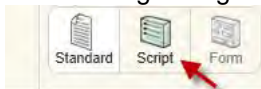
5. If you find that the **Results** pull-down is unavailable after visiting a Standard view, the **How** may have switched to **Email**. Switch it back to **Walk** or **Phone** (whichever you are using):

6. To jump to another voter in the list, use their VoteBuilder ID number from below the barcode on your printed list:
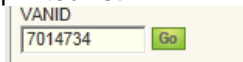
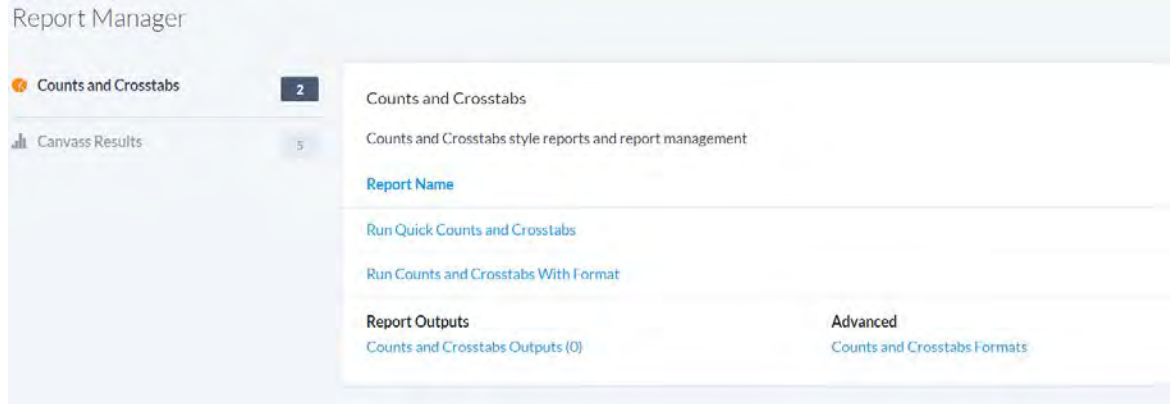## 9.6   Counts and Crosstabs

This section has recently changed the front end interface. From the **Main Menu**, open the **Report Manager** to see the **Counts Crosstabs** section. Counts are run every night; so generally the most current data you will

see is "yesterday". You can also access this functionality from the **My List** page.

Reporting & Data Analysis

⊞   Report Manager

Choose the **Counts and Crosstabs** subsection:

Report Manager

⊗ Counts and Crosstabs	**2**	**Counts and Crosstabs**
⊪ Canvass Results	5	Counts and Crosstabs style reports and report management

Report Name

Run Quick Counts and Crosstabs

Run Counts and Crosstabs With Format

Report Outputs	**Advanced**
Counts and Crosstabs Outputs (0)	Counts and Crosstabs Formats

1. Specify the desired information in columns and rows One of the most frequent requests is for the number of voters in each precinct. To set a column, section, or crosstab click on the tree icon to reveal the drop down list:

Registered Voters by Precinct

Crosstab by Party

Export To Excel

Section 1 Crosstab 1	Section 2 Crosstab 1	Section 3 Crosstab 1	☐ Show Group Totals
Party			

Crosstab 2	Crosstab 2	Crosstab 2	

☐ Show Percentages	☐ Show Percentages	☐ Show Percentages	

Column 1	Column 2	Column 3	Column 4			
Precinct				People ▾	from	Registered Vote ▾

County Supervisor
Ethnicity
General Voting
Likely Ethnicity
Municipality
Neighborhood
Party
Permanent Absentee
Precinct
Primary Voting
Regional District
SD
Sex
Voted Status
Zip Code
Scores
Targets

Refresh Results

		Party							
	Party	Republicans	Green	Libertarian	Other	Amer. Ind.	PeaceFreedom	Unknown	Total People
	137	255	1	6	4	21	0	0	585
	75	289	1	1	1	9	1	0	422
	202	392	2	10	4	37	1	0	927
	123	213	2	5	2	16	2	0	498

2. You can create complex scenarios to categorize the data and you can also Export to Excel:

Party by Permanent Absentee

	Democrats			No Party			Republicans			Green			Libertarian			Other			N
Neighborhood	N	Y	Unknown	N	Y	Unknown	N	Y	Unknown	N	Y	Unknown	N	Y	Unknown	N	Y	Unknown	
Bonsall	18	42	0	16	40	0	31	102	0	1	0	0	1	3	0	0	0	0	
Buena	425	541	0	383	396	0	608	813	0	11	11	0	12	15	0	7	7	0	
Camp Pendleton	217	128	0	320	130	0	404	274	0	5	1	0	17	16	0	1	0	0	
Carlsbad	6,826	11,352	0	6,806	9,769	0	9,018	15,913	0	102	143	0	187	349	0	75	87	0	7
De Luz	35	72	0	36	49	0	60	103	0	3	1	0	2	1	0	1	0	0	
Del Dios	936	1,307	0	1,235	1,384	0	1,221	2,087	0	5	9	0	20	35	0	6	7	0	
Del Mar Heights	1,047	1,788	0	795	1,087	0	881	1,491	0	18	20	0	32	26	0	4	9	0	

9.7 Viewing Canvass Results

This section has recently changed the front end interface. Open the Report Manager to see the **Canvass Results** subsection:

1. Choose the kind of summary you want to see and then configure the ordering. For example, default results will be for "yesterday", you can change the dates to get a broader range of dates or a desired specific date.

2. To see precinct results, group by County, then click If you click on the link the San Diego County link:

3. You may want to set your preferences via the Set Report Preferences Link:

4. You may also find it helpful to group by canvasser to see how effective individual canvassers are.

5. If you are looking at the results for a single day, individual canvassers will have a link associated with their name:

Olsson, Kami

6. By clicking the link, you can "drilldown" and see the results of that day's canvass and you can follow any individual voter's link to make any needed corrections:

Daily results for 8/13/2008

Previous View

Address	Voter	Time	NH	Canv	Ref	Dec	Mvd
7383 BALLINGER AVE	Macys, Stephanie	12:00:00					X
7251 BALLINGER AVE	Broadus, Gary	12:00:00		X			
7303 BALLINGER AVE	Hasbrooke, Ronald	12:00:00		X			
7373 BALLINGER AVE	Schoonover, Duane	12:00:00		X			
7452 RAINSWEPT LN	Smith, Shirley	12:00:00		X			
7415 BALLINGER AVE	Bendik, Virginia	12:00:00		X			
7413 RAINSWEPT LN	Barbeau, Karen	12:00:00		X			

10   My Campaign

The **My Campaign** tab is the secondary tab of VoteBuilder and accesses a different portion of the database from **My Voters**. If your campaign has a lot of volunteers or events, you may find this to be a valuable resource. To have it turned on for your campaign, contact SDCDP.

Functionally, there are many similarities between My Voters and My Campaign. When you are working with the **My Campaign** tab, you are working with volunteers, staffers, contacts and supporters (who may/may not also be registered voters or VoteBuilder **Users**). Your **My Campaign My List** is distinct from the **My List** in **My Voters.**

Information gets into My Campaign when it is copied from My Voters or when it is input by your Team:

You can use **My Campaign** to:

- Serve as your database for staff/volunteers/donors
- Track role and availability (e.g., Canvasser, Driver, Mornings, Weekends …)
- Create targeted lists of volunteers – can create an email list or phone bank
- Create a calendar of events and manage participant/attendee lists
- Keep lists of Organizations that your Campaign works with

The tabs for **My Voters** and **My Campaign** allow you to select which database you want to work in – each one has a Main Menu page. **My Voters** is where you would create walk lists, update voters, and enter canvassing data. **My Campaign** is used for volunteer/supporter/event management. You can tell what database you're in by seeing which tab is highlighted or visible. In the image below, My Campaign is the highlighted tab and the similarity to My Voters can be seen:
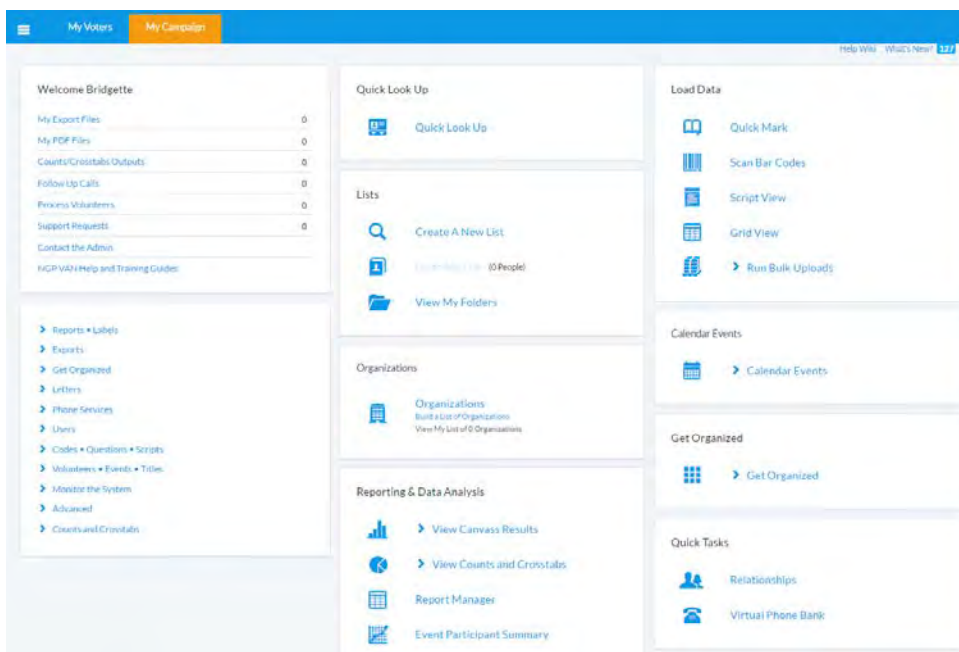
Like **My Voters**, you can create activist codes, scripts and report formats to use with your **My Campaign** universe. We also give you the access to create your own Survey questions to use as you canvass individuals and enter data.

Unlike **My Voters**, only your committee can see the people added to your **My Campaign**. Any individual person may appear in multiple different committee's **My Campaign** universes.

This My Campaign section assumes that you have read the parallel sections in My Voters. While there are some content differences, there are no functional differences (Reports, Create a List, View My Folders, Canvass Results, Counts/Crosstabs, Load Data, Virtual Phone Bank).

10.1 Planning Ahead For Activist Codes, Volunteer Profiles, and Survey Questions

By using Activist Codes or Volunteer Profiles you can tag the members of your campaign with information that will allow you to create specific lists (e.g., all data entry volunteers or all volunteers who can work on Tuesday morning).

You may want to choose one method over the other or use a combination. One advantage of using Activist Codes is that they can be displayed on a Report Format while Volunteer Activities do not have that option.

10.1.1 Activist Codes

1. SDCDP can provide you with a set of Activist Codes that you can use in **My Campaign** – these codes work with the *SDCDP Campaign Volunteer Details* Report Format. Please let us know if you would like to use these. These can be viewed by clicking on Codes/Questions/Scripts and navigating to Activist Codes:

2. You should create any (additional) Activist Codes that you want to use. You may also choose to create your own codes with the same names as the SDCDP codes so you can get counts of members with those codes (you will not get counts if you use the SDCDP codes). For example:

Type	Long Name	Medium	Short	Scope	Activist	Count
Visibility	Display Yard Sign	DisplayYS	YS	Private	☐	25
Visibility	Endorsed	Endorsed	End	Private	☐	35
2 Activist Codes · 1 Page						

10.1.2 Volunteer Activities

1. Individuals in My Campaign have a searchable Volunteer Profile associated with their individual record:

2. SDCDP has set up some default Volunteer Activities to get you started:

ID	Volunteer Activity	Has Staging Location Goals	Volunteers
88325	Attendee	☐	1
88322	Canvassing	☐	0
88323	Data Entry	☐	1
88324	Phone Calling	☐	2

4 Volunteer Activities · 1 Page

3. You can customize the Volunteer Activities available for assignment from the Main Menu page:

10.1.3 Setup Survey Questions and Responses to use in a Script

You may also want to use Survey Questions and Responses as you canvass your campaign's members. Campaigns are enabled to create their own My Campaign Scripts and Responses. TIP: use Calendar of Events to schedule people for specific events rather than survey questions ("will you come to this coffee on Saturday?"). We highly recommend the video available in the NGP VoteBuilder Help and Training Guides with a caveat that your campaign's My Campaign Scripts are not tied to Master Survey Questions.

10.2 Calendar of Events

You can use **My Campaign** to create and track your own campaign events using Calendar Events and viewing **Calendar** to invite and schedule volunteers for those events.
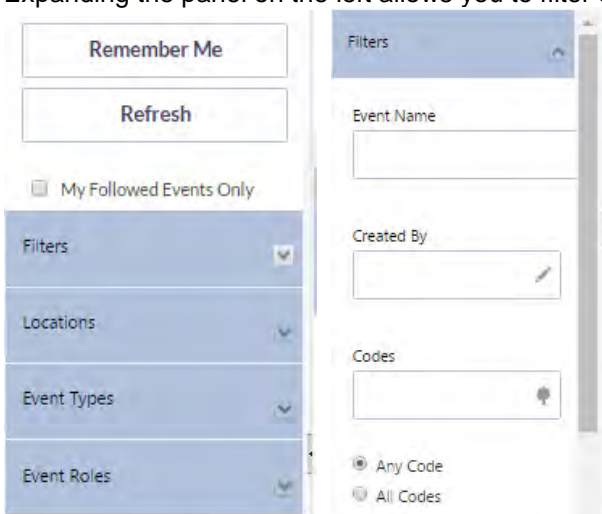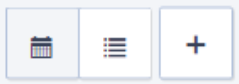
Calendar Events

1. The calendar displayed will include all events already that are scheduled. For example:
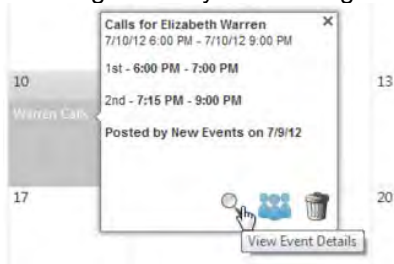

2. Expanding the panel on the left allows you to filter events by your criteria:

3. In the upper right, you choose between calendar view, list view, or add a new event:

4. Hovering over any event will give you quick actions and an overview of the event:

5. Each event will have a page that summarizes the event, the location, event leads, the participants, and the shifts:

Participants Summary

	Invited	Left Msg	Scheduled	Tentative	Declined	Confirmed	Conf Twice	Cancelled	Completed	Walk In	No Show	Paid	Wait List
Canvassing	1	1	11	2	47	0	0	0	0	0	0	0	0
Phone Calling	0	0	0	0	0	0	0	0	0	0	0	0	0

Edit

Shifts

Name	Start Time	End Time	Count
Single Shift	9:30 AM	3:30 PM	62

Edit

6. You can check the Event Participant List via any individual's link to that event, from the event summary page, from the calendar or list view:

10.2.1 Creating an Event

1. To get started, select **Add New Event** icon to open the New Event Wizard. Select the type of event then continue to the first tab. Only the first tab is required to create the event.

2. For each event, you can add/change the shifts, the repeat cycle, the locations, the roles and who you are sharing the event with. Please check with SDCDP before sharing events.

10.2.2 Scheduling Volunteers for Events and Setting Status

1. Volunteers can be added to events via My List, Grid View, Script View, Quick Mark or Virtual Phone bank. Events and the Event Scheduler can also be added to Scripts.

2. From their individual record, open the **Upcoming Events** or **Past Events** section, click **Schedule for Events**:

3. Select the event(s), pay attention to the dates, times, and roles, and set the status for each role. It is recommended that you **Apply Contact History**.

10.3 Adding My Campaign Members

You create a member entry for every staffer, volunteer, and/or supporter. If they are registered voters, you will copy their information from **My Voters**. For every member created, you can create an optional user account.
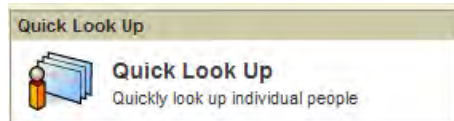
10.3.1 Adding from My Voters

1. While in a voter's individual record, use the link to **Add To My Campaign**:

10.3.2 Creating a Campaign Member from My Campaign

1. If you are in My Campaign, first make sure they are not already there. Use Quick Look Up to find the individual:

2. If they are already in the My Campaign part of VoteBuilder, their name will appear at the bottom of the page.

Name	Address	City	Age	Phone
Leahy, Megan E	18375 BERNARDO TRAILS CT	SAN DIEGO	19	(858) 229-1949
1 Person · 1 Page				

3. If they are not already in the My Campaign part of VoteBuilder, then select Search My Voters:
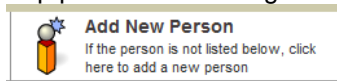
Control Panel

🔍 **Search My Voter File**

4. If they are a registered voter in My Voters, their name will appear at the bottom of the page. Several potential matches may appear. Select the matching individual and then click Copy Person:

	Name	Address	City	Age	Phone
⊙	Olsson, Mark S	5897 SOLEDAD MOUNTAIN RD	LA JOLLA	53	
1 Person · 1 Page					

Copy Person
First select a voter from the list below

5. If none of the names in the Voter file match, then the person may be 1) registered outside of your district, 2) recently registered and the SDCDP Voter File has not yet been resynchronized or 3) they may not be registered (e.g., 16 years old or ineligible). In those cases, select Add New Person and follow the three-step process for adding a new person:

Add New Person
If the person is not listed below, click here to add a new person

6. Enter as much information as possible in the Add New Person page:

Add New Person   Remember Me

First Name	Middle Name	Last Name	Suffix
Jane		Smith	

Home Address			Work Address		

City	State	Zip	City	State	Zip
		92122			

Mobile Phone	Home Phone	Work Phone

Email	Sex	Date of Birth

Save   Save/Next

7. You will be returned to the Quick Look Up page where you can look up your new person.

8. From their individual page, you should add any additional information (e.g., Activist Codes, Notes, Volunteer Profile). This will NOT change any content information for this person's record in the My Voters side of VoteBuilder.

10.3.3 Linkage between My Voters and My Campaign

My Campaign members who are also Voters can have a link between the two data areas. An advantage of having the linkage between the data areas is that you can use the links to toggle between the two databases to compare contact information or check on other **My Voters** data.

1. **Create a New List** in each of the tabs has a search option that allows you to see where you have linkages:
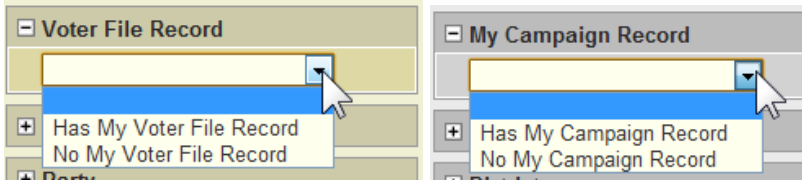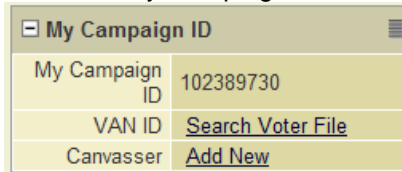

2. When voter is linked, you will see the linkage in the My Campaign ID box and the VoteBuilder ID box:
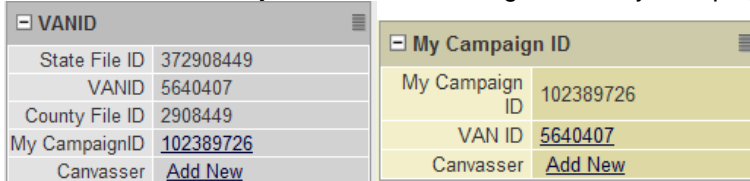
10.3.4 Linking Voters from My Campaign Record

1. When you have an individual in **My Campaign** who is not yet linked to **Voters,** you can make the linkage from their My Campaign ID box through the **Search Voter File** link:

2. If you have a match, you will be given an option to link:
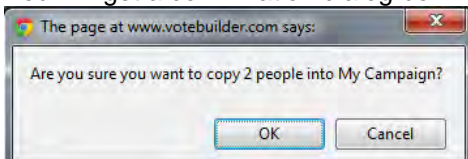

10.3.5 Using Copy to Move Voters to My Campaign

1. If you have a list of voters in **My Voters** who you want to bring into **My Campaign**, you can do that from the **My List** page using the **Copy** feature.

2. From **My List**, choose the Copy icon.

Copy

3. You will get a confirmation dialog box:

4. The copy is done as a batch process:

Moving people to My Campaign

Your bulk move to My Campaign has been added to the batch schedule.

If you have a large list, the process may take a few minutes to complete.

While you are waiting, you may do other work.

To check on the status of your bulk move, go to Administer Bulk Upload Processes.

Once your bulk move is complete, it will appear as a saved list in the "Bulk Copied from Voter File" folder in the **My Campaign** database.

5. Depending on the size of your list, it takes several minutes to hours to complete:

Bulk Upload Batches

Committee	View	Top	Date From	Date To
SDCDP Training	Incomplete Batches Only	100		
Upload Type				

Remember Me   Refresh

Upload Type	User	Date	Count	Processed	Tools
BulkVol: Copy People into My Campaign	Olsson, K.	7/8/12	2	0%	

1 Bulk Upload Batches · 1 Page

6. When voter is linked, you will see the linkage in the My Campaign ID box and the VoteBuilder ID box:

⊟ VANID	
State File ID	372908449
VANID	5640407
County File ID	2908449
My CampaignID	102389726
Canvasser	Add New

⊟ My Campaign ID	
My Campaign ID	102389726
VAN ID	5640407
Canvasser	Add New

10.4 My Campaign Lists

Much in the same way that you create lists of voters in **My Voters**, you create lists of members in **My Campaign**. You can have one **My List** in **My Campaign** at a time – this is distinct from your **My Voters My List.**

My List

8	People
5	Phones
5	Doors
5	Mailboxes

Print   Letters   Labels   Calls   Export   Counts   Task   Upload

Edit Search ▾   Load List   Save List As   New Search

10.4.1 Getting Your Full List

1. Click search without specifying any other criteria and you will get a list that looks much like a voter list.

2. My Campaign Suppressions are set to automatically include bad addresses – that way your lists will show people for whom you only have partial records.

10.4.2 Report Formats

1. SDCDP has provided Report Formats that you can use or build upon:

   NOTE: see the comparable instructions for the My Voters in this manual.

2. Our SDCDP Campaign Volunteer Details format uses a default sorting of alphabetical as we have found that to be more useful:

3. The SDCDP provided format shows details about the volunteers with X preceding the roles they have selected (set by Activist Codes):

4. In the example above, the first member has demographic information including party, age, gender, and districts (the U for gender can only be corrected by re-registering). The second member does not have any demographic information or an address (no address is considered a bad address). This because her My Campaign information is not linked to her My Voter information.

10.4.3 Calls

Set up for Virtual Phone Banks in My Campaign is identical to My Voters. The source of the data is My Campaign records. The difference in My Campaign is that you can add Volunteer Activities and Events to your Scripts:

A key difference is that you can add specific events or the event scheduler to your phone bank:
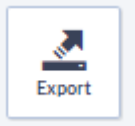

10.4.4 Export

Export in My Campaign has all of the options available in My Voters as well as other options related to Events, Volunteer Activities, and Email.

10.4.4.1 Emailing the Members of the Current List

1. To create an email list that you can use to contact your My List, select Export from My List:

2. Choose Email Blob and then click Next:

3. Specify if you want the emails separated by semi-colons or commas (whichever your email system uses) and then click Finish:

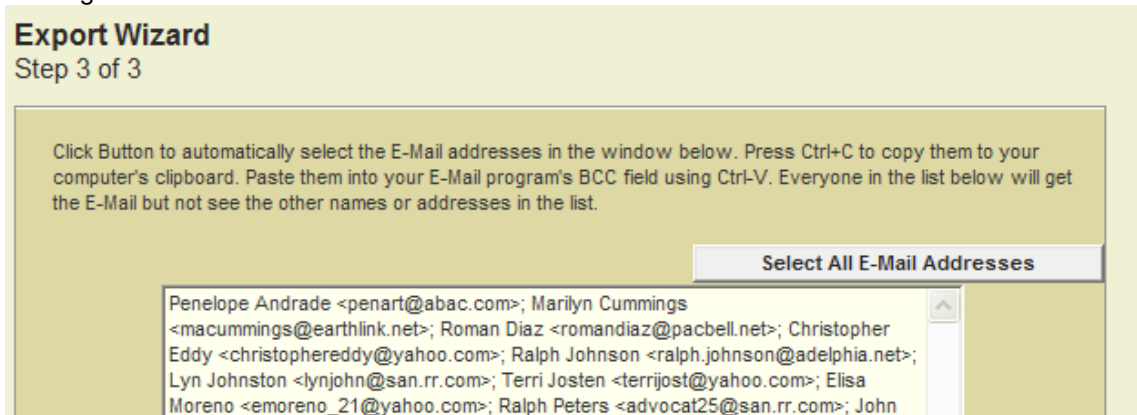4. Follow the instructions for copying the addresses into the BCC (blind carbon copy) field of an email message:

Export Wizard
Step 3 of 3

Click Button to automatically select the E-Mail addresses in the window below. Press Ctrl+C to copy them to your computer's clipboard. Paste them into your E-Mail program's BCC field using Ctrl-V. Everyone in the list below will get the E-Mail but not see the other names or addresses in the list.

Select All E-Mail Addresses

Penelope Andrade <penart@abac.com>; Marilyn Cummings <macummings@earthlink.net>; Roman Diaz <romandiaz@pacbell.net>; Christopher Eddy <christophereddy@yahoo.com>; Ralph Johnson <ralph.johnson@adelphia.net>; Lyn Johnston <lynjohn@san.rr.com>; Terri Josten <terrijost@yahoo.com>; Elisa Moreno <emoreno_21@yahoo.com>; Ralph Peters <advocat25@san.rr.com>; John

5. NOTE: It is very important to use BCC – this protects the email privacy of the people on the list.
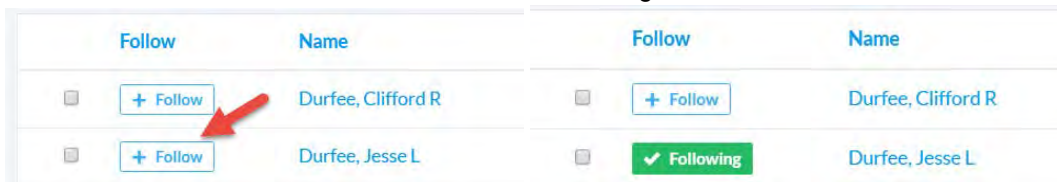
REMIDNER: An individual can have their email address in three places and they can all be different: **Users**, **My Voters**, and **My Campaign**. If you update one, please remember to update all.

10.5 Using Follow for Individuals

New in 2016, is the Follow feature which can be used in My Campaign for individuals to make it easier to quickly find an individual's record that you are working with.

Individuals can be followed from the Quick Look Up result page, on My List, or from an individual record.

1.1. To follow an individual, click the button and it will turn green:

	Follow	Name		Follow	Name
☐	+ Follow	Durfee, Clifford R	☐	+ Follow	Durfee, Clifford R
☐	+ Follow	Durfee, Jesse L	☐	✔ Following	Durfee, Jesse L

1.2. Click the following button again to reset the individual's status and it will turn white.

1.3. You can create a search for people you follow using the search criteria:

Followed People ★

Has Been Followed By Me   Yes

Followed Since
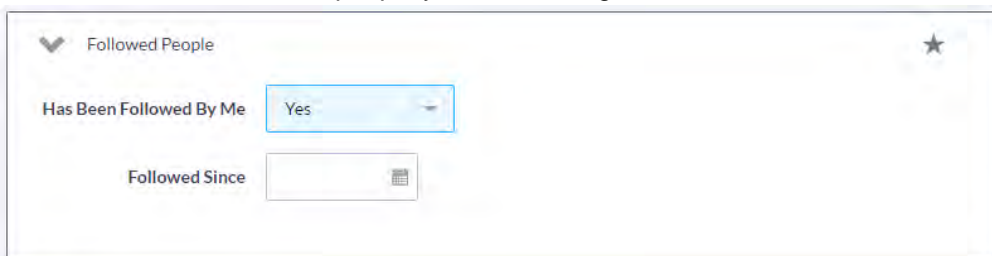
1.4. Then you will have a handy search you've created for future use:

Follow	ID	Type	Name
+ Follow	506130	Search	People I follow

1.5. The list will be limited to the people you are currently following:

| Name ∧ |
|--------|
| Chatterji, Purnima |
| Durfee, Jesse L |

11 Follow Ups (My Voters and My Campaign)

VoteBuilder has a process for associating a follow up with either a voter (My Voters) or a volunteer (My Campaign) and assigning it to a user.
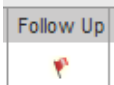
1. To schedule a follow up, access the volunteer or voters record via **Quick Look Up**. Standard View: open the Contact History section and use Schedule Follow Up:
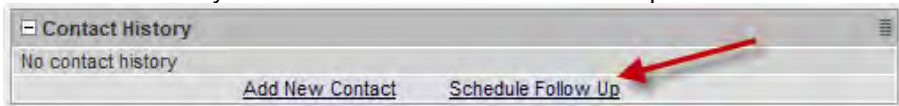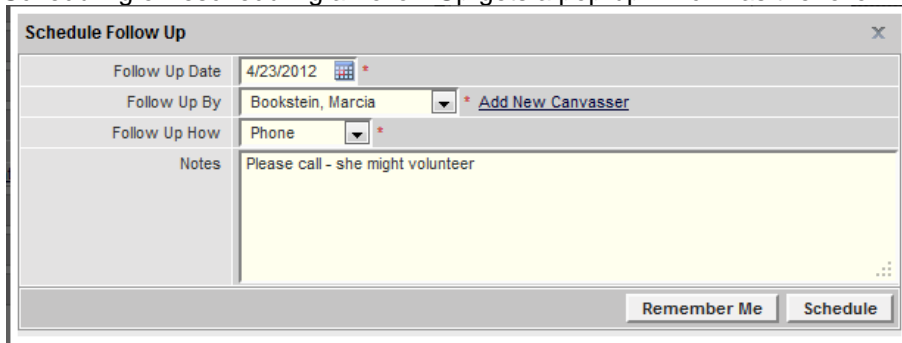
2. Script View: open the Contact History section where you use Schedule New Contact:
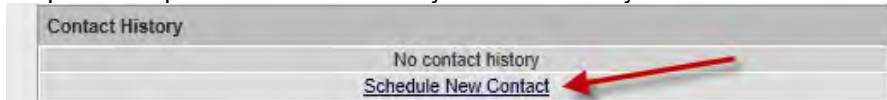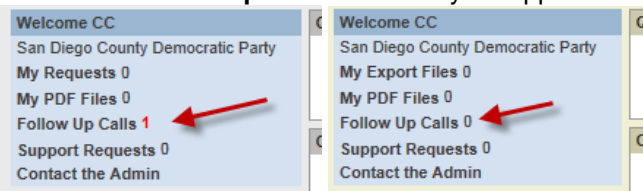
3. Grid View: use red flag you can use (you must have Follow Ups checked in set-up):

4. Scheduling or rescheduling a Follow Up gets a pop-up which has the following fields:

5. Scheduled **Follow Ups** are located in your upper left navigation box:

6. The number of Follow Ups changes from 0 to x when they are past due. You can still have Follow Ups assigned to you that are dated in the future and it will show 0 on the front page. You may want to make a habit of checking ahead.

7. Select Follow Up Calls in each of My Voters and My Campaign to see what you have assigned. For example:

My Follow Up Calls

Date From	Date To	Created By	Followed Up By		
4/23/12	4/30/12				

Tags

○ Any Tag ○ All Tags

Tag Applied From Tag Applied To

Remember Me   Refresh

Name	Address	City	Age	Phone	Follow Up	Follow Up How	VANID
Moll, Sandra F	16077 Avenida Lamego	San Diego	70	(858) 673-4076	4/23/12	Phone	6105485

1 People · 1 Page

8. Selecting the Name of a person in the list will get you to their record. View the Notes to get more information – the date will match the date of the Follow Up assignment to you:

Notes

Save

Options

Please call she might volunteer
User, J. (4/23/12)

9. Use the Contact History to complete the Follow Up:

Contact History

Date	Canvasser	Committee	Type	Result	Input	
4/23/12	Olsson, K.	San Diego County Dems	Phone	Schedule	Manual	
	Add New Contact	Schedule Follow Up		More		

10. By selecting Schedule, you can Complete, Reschedule or Cancel a Follow Up:

What would you like to do?

○ Complete Follow Up
○ Reschedule Follow Up
○ Cancel Follow Up *

Save

Reschedule allows you to assign the Follow Up to someone else.

11. In My Voters, you will only have access to Follow Up on voters who are in your community (aka universe). If you get an Oops, contact your coordinator for more help:

Oops

This person cannot be displayed.

Go Back

12. We recommend that you set the dates for each of My Voters and My Campaign and use Remember Me so you can see past and future follow-ups automatically:

My Follow Up Calls

Date From	Date To	Created By	Followed Up By		
3/1/2012	12/31/2012				

Tags

○ Any Tag ○ All Tags

Tag Applied From Tag Applied To

Remember Me   Refresh

12 Using Bulk Upload to Add Information (My Voters and My Campaign)

You may have data that has been shared with you from a different source or a quantity of information that you want to load into the database. This can be done from a text file by the Campaign Admin.

1. On the **Main Menu**, the **Load Data** section has a **Run Bulk Upload** Option.

2. In My Voters, you can use Bulk Upload to Load Data from a text file using:

    *   VoteBuilder ID
    *   County ID
    *   State ID ("37" pluse County ID)

3. In My Campaign, you can use Bulk Upload to Load Data from a text file using:

    *   My Campaign ID
    *   Through process volunteers so you can review each entry
    *   Directly without review

4. When in **My List**, you can use **Upload** directly to add volunteer profiles, activist codes, or notes to the list:

5. The My Voters bulk upload options allow you to add Activist Code, Canvass Results, Survey Responses, Notes, and to save as a saved list.

6. The My Campaign bulk upload options are:
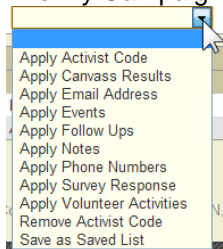
13   Election Specifics

13.1 Consolidated Precincts

During each election many "home precincts" get consolidated by the Registrar of Voters. Consolidations have from 1 to 10 VoteBuilder precincts in them. Voters will have their consolidated precinct number on their sample ballot; if their precinct is part of a consolidation that may be different from the precinct number you use in VoteBuilder. SDCDP will provide you with an excel spreadsheet of the VoteBuilder precincts to Consolidated precincts and also of the Polling locations and their consolidated precincts.

13.2 Mandated Vote-by-Mail

Some precincts are designated as all-vote-by-bail by the Registrar of Voters because there were not enough voters to establish a polling location. Voters in these precincts may or may not be registered as Permanent Mail Voters. Shortly before early voting begins, they will each show a ballot requested date in the Early Voting section and will be included in SDCDP's Vote-by-Mail target.

13.3 Polling Locations

Polling locations are added at least 30 days before each election. Once polling places are added:

- They are shown in the header of any report format that sorts at the precinct level
- They appear in each voter's individual record
- They can be included in a report format
- They can be included in Virtual Phone Banks for GOTV calls
- They appear on Get Organized

Vote-By-Mail will be shown as the polling location for any precinct as appropriate.

13.4 Early Voting

Early voting begins 30 days before each election. SDCDP gets regular, sometimes daily, updates from the ROV on which ballots have been mailed and which ballots have been returned and adds that information to VoteBuilder.

1. You can find out who has voted in your district by creating a new list and using the Early Voting section:

2. As you create new lists, please remember to suppress these voters in your searches:

3. You can suppress these voters them in any lists that you print or reprint:

13.5 Self-Declared Voted Activist Code

SDCDP provides and shares the Activist Code "Voted" that can be used as you canvass for voters who self-declare that they have already voted. You may want to remove these voters from your searches and/or include this activist code in your scripts.

13.6 Election Day Lists for Poll Checking

SDCDP provides a format to facilitate poll checking of the alphabetic lists posted at each polling location for hourly updates.

1. Created the desired list to include only the voters you want to check on. Searching by consolidation number is now an option. You can have multiple polling locations in the same list. When printing a location for a volunteer who will be checking a poll, you only need to give them the pages that apply to the poll(s) they will be checking. If you will be doing phone follow-ups, remember to use DNC Confirmed phones in your search.

2. Print the list using the Report Format "Pollchecker (Street Index)". All necessary fields/sort order will be completed automatically (except the Title of course):

3. The formatted list will have page headers/breaks for each of the polling locations and will be alphabetical by voter for each polling location. If there are two polls at a polling location, they will be distinctly sorted according to the consolidation number (shown in parenthesis). In the list itself, there is checkbox to mark off voters as they vote and a checkbox to mark off voters as you make follow-up contacts:

14   Users

Users are the subset of your campaign staff and volunteers who will be using the VoteBuilder system. This is a different data space from **My Voters** or **My Campaign**. **Users** do not need to be San Diego County registered voters or volunteers/staff entered in **My Campaign**.

VoteBuilder strongly recommends that each person who needs access to VoteBuilder be given an account. Multiple persons should not be allowed to log-in with the same username. VoteBuilder may behave erratically and/or automatically log one person out if two people log in simultaneously with the same username.

If you have a volunteer who already has an SDCDP GO Team account or other VoteBuilder account, please create an account for their use on your committee. Contact SDCDP if you need help with a user who already has an account.

Each user account is created with a profile that enables them to access different functionality and also with an assignment to an appropriate set of voters. Several profiles are available for each My Voters and My Campaign. A user can have access to one or both data areas.

The Committee Admin has the access to support users by resetting their password or impersonating them to see what they are seeing when they are logged in. Any support tickets filed by your users will go to your Committee Admin. Any support tickets filed by your Committee Admin will go to the County Admin.

14.1   Creating a New User

1.   Navigate to Users > Users:
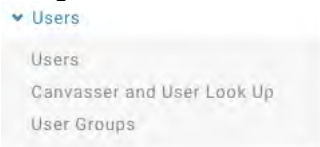
2.   Click Add New User:
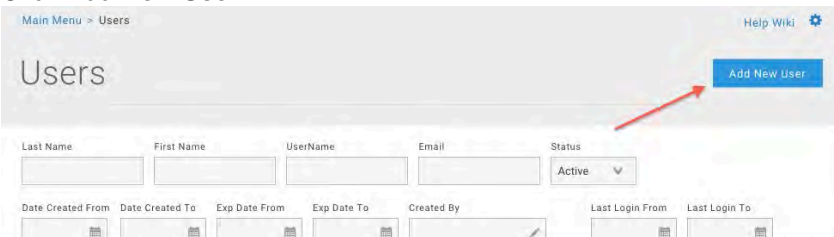
3.   Set up the New User as desired. Set their User Profile to allow access to My Voters:

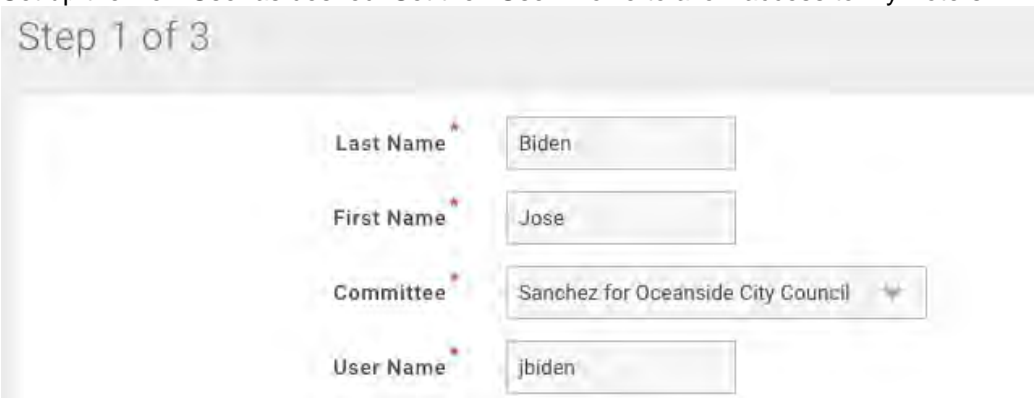4. Set up their My Voters Profile and their optional My Campaign Profile. Your options may look slightly different

My Voter File Profile

My Campaign Profile

✓
Committee Admin
Committee Admin PE
Committee Consultant
Committee Lookup/Search/Counts
Committee Member
Committee Member PE
Committee Member Plus
Data Entry Only
Data Entry Virtual Phone Bank

5. Assign the People (aka accessible voters) as desired. For example:

Step 2 of 3

Assign By * County

☑ San Diego

6. A default email will be created; all you may need to add is the email address. For example:

Step 3 of 3

New User's Email Address * jose@sddemocrats.org

☐ Send a copy of this email to yourself

B *I* U ABC x₂ x² **A** ▾ ab ▾ ☰ ☰ ☰ -- Font family -- ∨ -- Font size -- ∨

HTML ☰ ☰ ☰ ☰ ✂ 📋 📋 ↺ ↻ = = 📥 ✓ ⓘ

Jose Biden,

Your username is **jbiden**

To log in, create an ActionID. If you choose, you can create your ActionID using your personal email. That way you can use it at any campaign or organization that uses NGP VAN in the future - it's yours for life. Click the link below to create your ActionID

Create an ActionID

Note: The email will come from Your Name < no-reply@ngpvan.com>. You may want to confirm receipt by your new user via an email outside of VoteBuilder or via phone to make sure their ISP did not block the email.

7. Send the email:

Skip   Send

8. Review the setup on the User's page. Add to User Groups if desired.

1. There is a shortcut for creating User Accounts from My Campaign. Begin at the individual record for the My Campaign member for whom you want a user account.

2. If you will be creating a user account and plan to limit voter access, you may want to copy the appropriate information from their Districts section:

☐ Districts	
State	California
County	San Diego
Precinct	105020

3. The individual is now in My Campaign as a volunteer. For any volunteers who will be using VoteBuilder or who you want to have their name appear in the Canvasser's list, the next step is to create their VoteBuilder login. Select Create User Account:

☑ Actions

- 💾 Save All
- ⊞ Save Page Layout
- ⤬ Merge Duplicate
- 🧑 Create User Account
- 🗑 Delete Person

4. Create a username. The preferred name is first initial last name. If that is already taken, you can use first initial middle initial last name or first initial last name digit (e.g., jmsmith or jsmith1). Set the My Voters Profile to Precinct Captain. Most users will not have a My Campaign Profile:

New User
Step 1 of 3

Last Name	Leahy	*
First Name	Megan	*
Committee	DCCC-San Diego Democratic County Central Committee ⌄	*
User Name	mleahy	*
My Voter File Profile	Precinct Captain ⌄	
My Campaign Profile	⌄	
	☐ This account expires in ⌄ ⌄	

Next

5. Assign Voters to the user. Set Assign By to the desired constraints, e.g., Precinct, and County to San Diego. If using precincts, allow time for the precincts to load and then select the precinct:

Assign Voters
Step 2 of 3

Assign By	Precinct ⌄	*
County	San Diego ⌄	*

☐ 100000 ☐ 307400 ☐ 429410 ☐ 486930
☐ 100020 ☐ 307450 ☐ 429420 ☐ 487000
☐ 100050 ☐ 307500 ☐ 429430 ☐ 487010

6. Save the form:

Save

7. The next screen, Send User Login Instructions, will allow you to edit a message to the new user and send them an email.


8. Save the user:

9. NOTE: If you create a user in My Campaign and want to assign them to a My Voters User Group, you will need to access Users > Users when on the My Voters tab.
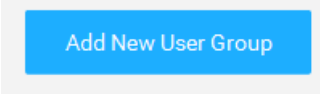
14.2 User Groups

By adding **Users** to a **User Group**, you can provide them with access to Folders and Virtual Phone Banks without having to specifically add them as individual users.

1. Navigate to Users > User Groups:
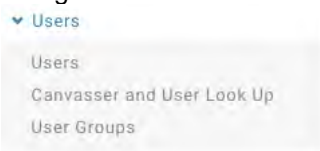
2. Click Add New User Group:

Name	Committee	Created By	Users	Date Created
Sandy Campaign	SDCDP Training	Olsson, Kami	3	2/20/12

3. Click on the name of the User Group to add members to the group.

4. You can also add user to a group from their individual user pages in the User Groups section.

15　Online Resources and Support Requests

On any page, click on the Help Wiki to see if there is additional documentation available.

From the Main Menu page in the yellow Welcome Menu, there is a link to the growing NGP VoteBuilder Help and Training Guides.

If you are not able to find the answer you need in the resources available to you, please file a support request through the VoteBuilder system, rather than via email or phone. We'll review it and either resolve it or route it appropriately. When your user's file requests, they will be sent to you for handling or to forward on to the SDCDP for further assistance. Please be sure to include as much information as possible to enable us to replicate the problem you are having (i.e., include the name of the list, script, folder, activist code, report format, voter etc.).

You'll be able to the report requests created by you and assigned to you:

Ticket #	State	Committee	From	Subject	Urg	Date	Assigned To
77541	California	SDCDP Training	Training, Admin	Mismatched terms from Locations/Counts	Med	7/8/12	Olsson, K
1 Support Requests · 1 Page							

16　Activities Not Covered in This Document

Monitor System - see Help Wiki

My Campaign's Organizations – see Help Wiki