7/25/2012



ιp		PROGRESSIVE TECHNOLOG
TYPES OF	AVAILABLE ELECTION	DATA
NAME AND ADDRESS	ELECTION DISTRICT DATA	REGISTERED VOTER HISTORY DATA
Last Name	County Number	Sos Voterid
First Name	County Id	Year Of Birth
Middle Name	City School District	Registration Date
Suffix	County Court District	Party Affiliation
Residential Address1	Congressional District	Primary-03/07/2000
Residential Secondary Addr	Court Of Appeals	General-11/07/2000
Residential City	Educational Service Center District	Special-05/08/2001
Residential State	Exempted Village School District	General-11/06/2001
Residential Zip	Local School District	Primary-05/07/2002
Residential Zip Plus4	Municipal Court District	General-11/05/2002
Residential Country	Precinct Name	Special-05/06/2003
Residential Postalcode	Precint Code	General-11/04/2003
Mailing Address1	State Board Of Education	Primary-03/02/2004
Mailing Secondary Address	State Representative District	General-11/02/2004
Mailing City	State Senate District	Special-02/08/2005
Mailing State	Township	Primary-05/03/2005
Mailing Zip	Village	General-11/08/2005
Mailing Zip Plus4	Ward	Special-02/07/2006
Mailing Country		Primary-05/02/2006
Mailing Postal Code		General-11/07/2006
Career Center		Primary-05/08/2007
City		General-11/06/2007
State		Primary-03/04/2008 General-11/04/2008

The left column, Name and Address, includes the data you send to the matching process. When it returns from your voter data provider, you may find the addresses reformatted or different from the one in your database. Many groups do not load the addresses from the voter database because they are often not as accurate at what the organizers have accumulated in their door to door work.

If you use the PowerBase link to Cicero, you can get the middle column back. It will match on address, not on voter name, so the person does not need to be registered. You will also get this type of data back when you match with your voter data providor. You get the third column back if you match with your voter data provider. It is only available for registered voters.

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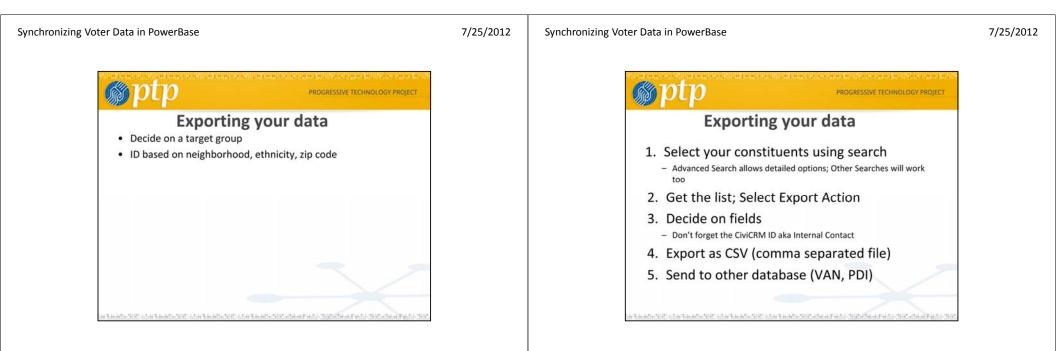
prh	)						PF	ROGRESSIVE TECHNO	LOGY	PROJE
im Data	Where	e does ti	he data go	o in	P	ov	/erBa	se?		
Custom data is stored in o								sets (e.g. Volunteer Info). Use o ne or many sets of oustom field		
1 Set	§ Enabled?	0 Used For	0 Type		Ord	er	0 style			
Communication Details	Yes	All Contact Types	Any			+ +	Inline	View and Edit Custom Fields	Preview	more •
Constituent Info - Individuals	Yes	Individual	Any	Ŧ	t	+ +	inine	Wew and Edit Custom Fields	Preview	more +
Grassroots info	Yes	Individual	Any	Ŧ	1	4.4	Tab	View and Edit Custom Fields	Preview	more .
Constituent Info - Organizations	Yes	Organization	Any	Ŧ	Ŧ	+ +	Inline	View and Edit Custom Fields	Preview	more +
Grant Info	Yes	Organization	Foundation	Ŧ	٠	4 4	Inline	View and Edit Custom Fields	Preview	more .
Proposal Info	Yes	Activities	Proposal	Ŧ	t	4.4	Inline	View and Edit Custom Fields	Preview	more +
Participant Info	Yes	Participants	Any	Ŧ	t	۰.	Inline	View and Edit Custom Fields	Preview	more +
Event Details	Yes	Events	Any	Ŧ	+	4 4	Inline	New and Edit Custom Fields	Preview	more +
Organizational Details	Yes	Organization	Any	Ŧ			Inline	View and Edit Custom Fields	Preview	more .
Demographics	Yes	Individual	Απγ	Ŧ	1	+ +	Tab	View and Edit Custom Fields	Preview	more +
iledia Outlet Info	Yes	Organization	Media Outlet				Inline	View and Edit Custom Fields	Preview	more .

PowerBase has the facility to expand itself. You can add custom fields to many types of records: contacts, activities, contributions, memberships, events. PowerBase administrators can get to this screen from the Administer>Customize Data and Screens>Custom Fields menu option.

There is a longer explanation in the CiviCRM manual available via the Help menu. Here is the current url: http://book.civicrm.org/user/organising-your-data/custom-fields

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		v	от	E	2 0	USTO		os			
ree + CiviCRM + Admini	ter OviCRIF - Cust	tom Deta									
Voter Info -	Custom	Fields									
† Field Label	Data Type	0 Field Type		Orde	e.	0 Req7	© Searchable?	0 Enabled?			
Party Registration	Alphanumeric	Radio			٠ <u>+</u>	No	Yes	Yes	Edt Field	Edit Multiple Choice O	ptiona more
If other party	Alphanumeric	Text	Ŧ	1		No	Yes	Yes	Edit Field	Preview Field Display	more +
PrecinctName	Alphanumeric	Text	Ŧ		1 ±	No	Yes	Yes	Edt Field	Preview Field Display	more +
State District	Alphanumeric	Text	Ŧ	1		No	Yes	Yes	Edit Field	Preview Field Display	more +
Precinct	Alphanumeric	Text	Ŧ	+ -		No	Yes	Yes	Edt Field	<b>Preview Field Display</b>	more +
Ward	Alphanumeric	Text	Ŧ	1		No	Yes	Yes	Edit Field	Preview Field Display	more +
City District	Alphanumeric	Text	Ŧ			No	Yes	Yes	Edt Field	Proview Field Display	more +
School District	Alphanumeric	Text	Ŧ	1		No	No	Yes	Edit Field	Preview Field Display	more +
County District	Alphanumeric	Text	Ŧ	1		No	No	Yes	EditField	Preview Field Display	more +
State Assembly District	Alphanumeric	Test	Ŧ	1	* *	No	Yes	Yes	Edit Field	Preview Field Display	more +
State Senate District	Alphanumeric	Text	Ŧ	•	*	No	Yes	Yes	Edt Field	Preview Field Display	more +
Congressional District	Alphanumeric	Text	Ŧ	1	÷ ±	No	Yes	Yes	Edit Field	Preview Field Display	more +

Voter Custom Fields have been set up by PTP for PowerBase. The basic design was created to make searching for individuals easier, but these can be further customized as needed. It's these fields that we will use to store all the related voter information in middle and right columns in the earlier slide

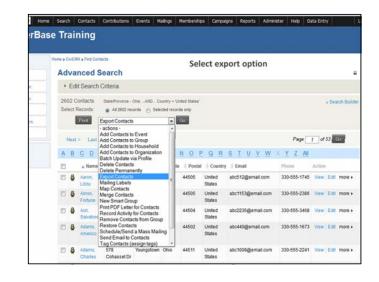


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#### Synchronizing Voter Data in PowerBase 7/25/2012 Search Contacts Contributions Events Mailings Advanced Search · Search Criteria Complete OR Partial Name @ Complete OR Partial Email Search Verws @ Display Results As @ Search - default view -. Contacts Reset Form E Search in Trash Contact Type(s) Group(s) Search Operator @ . · AND · - select -- select-Select Tap(s) All Tags @ - select -• ● Exclude ① Include by Privacy Option(s) @ Preferred Comm Phone Email Postal Mail SMS Fax • OR • - select -Email On Hold CMS User? - Yes - No Contact Source Job Title Preferred Language (clear) · select language · -Street Address Billing PHome PMain Cother Work ation types is g. Home, Work 1, phads one or m Zip / Postal Code OR Postal Code Range Northern Mariana Islands From To

You can use advanced search to find the data that you want to export to the voter engagement system. In this example we're only taking records from our state. Click Search to continue

#### Synchronizing Voter Data in PowerBase



After you search, you'll get a list result. Select the "action" to "Export Contacts" and press "Go"

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dvanced Se		Export options
Click Select fields for	export and then Continue to	nly used data values. This includes primary address information, preferred phone and email, o choose a subset of fields for export. This option allows you to export multiple specific locations n also save your selections as a 'field mapping' so you can use it again take.
vil. Search x2	Export All or Selected Field	a 3. Select Fields to Export
xport All or Selec	ted Fields (step 2 of 3	)
	ted Fields (step 2 of 3	)
Continue >> C	ancet	9
	inced for export.	9
Continue 20 C 2602 records sele Export PRIMARY fiel Select fields for exp	inced for export.	the Same Address
Continue 20 C 2602 records sele Export PRIMARY fiel Select fields for exp	cted for export. ds ot O not merge Merge Hi Contacts with Merge Household Memi	the Same Address

Export Options let you pick which fields you want to export. There is a default of "Export Primary fields", which gives you many columns from the contact. If you are doing this for a match with an outside organization, you are better off selecting "Select fields for export" and press "Continue". You'll get a prompt to use a set of export fields that you created earlier, if you have one, select it. Whether you have one or not, the next screen will allow you to select fields for export.

	be exported using the table below. Fo			
	Name). Then select the actual field to le types of contact records, and non-ap			
record).				
	fields If you want to export more field the same export setup in the future, chi			
	setup with a single click.	eck save this tield mapping at th	e cotom or the page be	rore continuing, you will then be
vit Search	N2 Expert All or Selected Fields	3. Select Fields to Export		
		a selectivies to capart		
Select Fields to	Export (step 3 of 3)			
<< Previous	Export>> Done			
Using Field Map	ping: Mapping 1 (PZ)			
Fields to include in				_
Individual	Internal Contact ID			
Individual	FirstName			
Individual	Last Name			
Individual	Phone		Home 💌 Phone	
Individual	Street Address		Home •	
	City		Home 💌	
Individual			Home •	
Individual	<ul> <li>State</li> </ul>			
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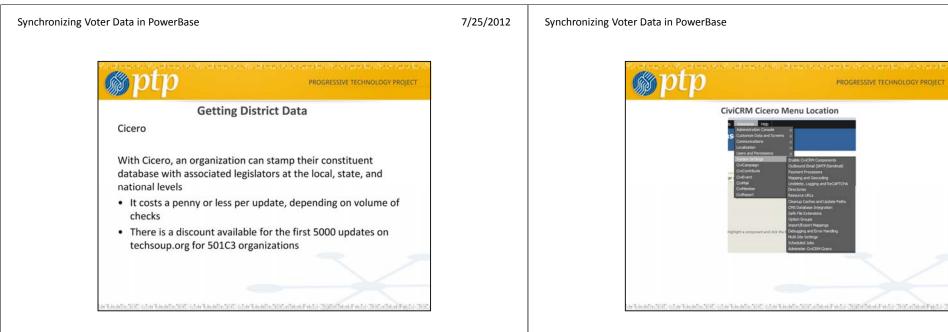
## Export field selection

This screen allows you to select the fields to put into the export file for the match process. Always include the Contact ID of the person. You'll need name and address of course. You may want to add other fields that will be useful to your work in the "mycampaign" section of the VAN software. It's a bit tedious to set up the first time, but you can save it and reuse it. Then the next time you export, it will be a breeze.

Synchronizing Voter Data in PowerBase	7/25/2012	Synchronizing Voter Data in PowerBase	7/25/2012
Search       Contacts       Control-tool one       Wanter Mallings       Manhoad Manhoad       Campage       Reports       Admentary       Lot         Advanced Search       Image: Search		PROGRESSIVE TECHNOLOGY PROJECT USING POWERBASE TO UPDATE DISTRICT DATA	
Individual    Postal Code   Mome  Mome  Individual  Grassroots:Saves Interest		artikatustit olartikatustit olartikatustit olartikatustit dartikatust (titalikat kato (titalikat kato (tita	

When the export is done, you'll get an prompt to save the file. It will go to the default location that your browser has for downloaded files.

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Cicero is a third party software site that PTP links to do the update of district data. The software that PTP has developed is still in beta stage, but it is operational. You have to pay for the updates. You will need an account to access. PTP may provide a

group account to get an economy of scale and lower the per unit charge for the look ups. We are waiting to see what the demand will be.

Link to the TechSoup site page:

http://home.techsoup.org/Stock/Pages/Product.aspx?cat=TechSoup%20Global%20Catalog &category=&id=G-46237

 $\label{eq:civiCRM} Cicero\ Menu\ Location.\ PowerBase\ Administrators\ can\ get\ to\ this\ menu.$ 

Synchronizing Voter Data in Pow	/erBase	7/25/2012	Synchronizing Voter Data in PowerBase	7/25/2012
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Civ Cice View Cice Solo Solo Notes	In the CNICRM date fail that you would tild to update when the cortact pets synonized with Ocean. Date fails The fail that if all record when the Select CNICRM Contact field Offsat we all net sync? Select CNICRM fails. Select CNICRM fails. Using that Legislater and TorringsIster district types will result in two toolups from the Ocean API. Legislater Detects Lead Wand or other load district Notice Linese (flows de district)		CivCRM Cicero Run Menu terre + Admonstration + Configuration CiviCRM Cicero Update Civi Contacts with Cicero Information Uponing sync runs. Civi Group Date Run Limit Total contacts Status Drupal User Cicero User There are no scheduled CiviCRM Cicero sync runs. Information about this Cicero sync runs. Information about this Cicero sync runs Con what day should this sync run? Jul = 29 = 12012 = Adviate CiviCRM Cicero Contact Sync Schedule CiviCRM Cicero Contact Sync	

This screen allows you to enter your Cicero account information and create a match list of your PowerBase data fields with the fields in the Cicero database.

After the system is configured, you can run it as needed from this menu. Set up a group of contacts to be matched beforehand.

Synchronizing Voter Data in PowerBase	7/25/2012	Synchronizing Voter Data in PowerBase	7/25/2012
		Home       Contracts       Contract (Contract (Cont(Contract (Contract (Contract (Contract (Contract (Contract (Cont(	
		Import file selection screen	

Select the import file. You will be updating "individual" records. Check the correct radio button for the date field. If you have saved a mapping from before, select that (at the bottom of the screen and not shown)

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# Synchronizing Voter Data in PowerBase

nport Contacts				-
v1. Choose Cate Source	Match Fields 3. Prev	ew 4 Sunnary		
tch Fields (step 2 of 4)				
e right-hand column. Select '- do	not import -' for any column dditional data from the sam	is in the import file the data source, check	Save this field mapping' at the boftom of the pag	
<pre>Continue&gt;&gt;&gt;</pre>	Ganoel			
Saved Field Mapping: Voter h	mport			
Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field	
Civierm D	638	520	Internal Contact ID *	•
SOS_VOTERD	OH0010469571	CH0018463674	State Voter File ID : Voter Info	۲
COUNTY_MUNBER	50	50	- do not import -	۲
COUNTY_D	453	885	Internal Contact ID *	۲
constituent type	Member	Nenter	- do not import -	
LAST_NAME	REDE	PITTS	LastName *	
FRST_NAME	MOHAEL	JOANN	First Name *	•

Import match fields screen

Match the columns in the import file to the correct fields in PowerBase. Save the field mapping for reuse.

s'1. Choos	e Data So	urce v2. Match	Fields s3. Preview	4. Summary		
review (s	tep 3 o	f 4)				
		w previews the rest ou are ready to pro-		ChiCRM, Review the totals	to ensure that they represent your expect	
<< Press	ne l	nport Now >>	Canori			
Total Rows	2009	Total number of row	is in the imported data.			
Vald Rows	2009	Total rows to be inp	orted.			
Saved Fiel	ld Mapp	sing: Voter Impor	1			
Column N	ames		Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field	
Overm D			638	525	Internal Contact ID	
SOS_VOTER	æ		OH0018469571	OH0018463674	State Voter File ID : Voter Info	
COUNTY_N	NDER		50	50	County Name : Voter info	
COUNTY_ID		468	885	CountyFileID : Voter info		
constituent t	constituent type		Member	Member	- do not import -	
LAST_NAME		REBE	PITTS	Last Name		
FRST_NAME		MCHAEL	JOANN	Fest Name		
Middle Name			к	j.	Midde Name	
SUFFIX					Individual Suffix	
YEAR OF B	INTH .		1943	1943	- do not impart -	

On the import confirmation screen, check the count and review to make sure that the fields are matched properly. Scroll down to add the imported records to a group or tag them.

When doing an import, create a tag or group so you can examine your work after the import

# Synchronizing Voter Data in PowerBase

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Import Status Screen

Voter Project Summer Camp 2012

