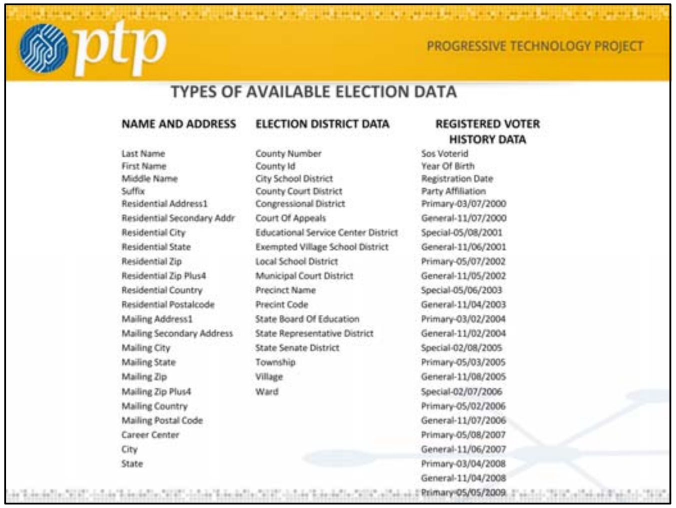
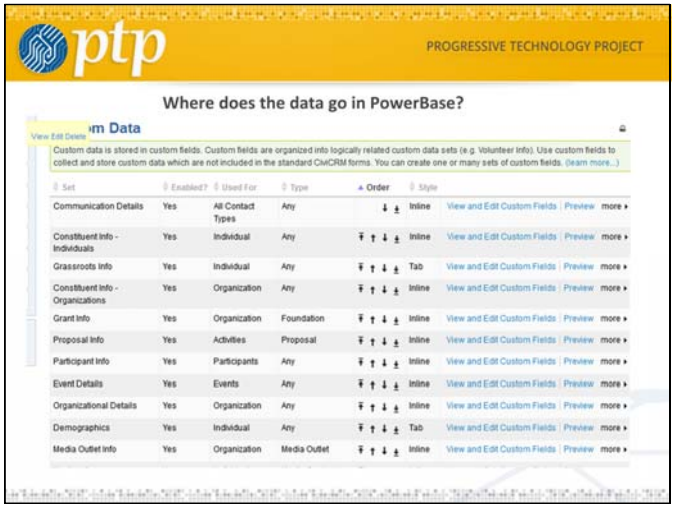
Synchronizing Voter Data in PowerBase 7/25/2012



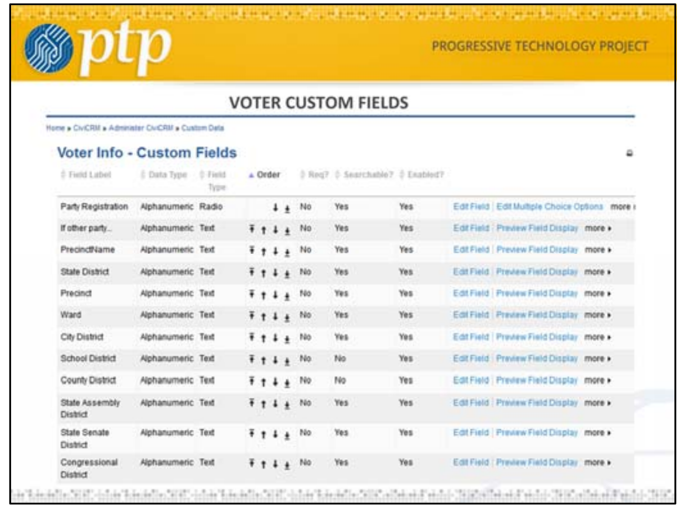
The left column, Name and Address, includes the data you send to the matching process. When it returns from your voter data provider, you may find the addresses reformatted or different from the one in your database. Many groups do not load the addresses from the voter database because they are often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



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



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 ptp PROGRESSIVE TECHNOLOGY PROJECT

Exporting your data

- Decide on a target group
- ID based on neighborhood, ethnicity, zip code

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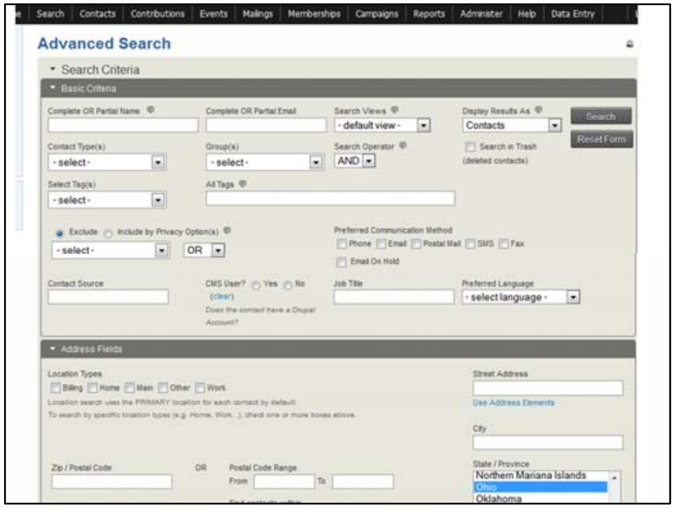
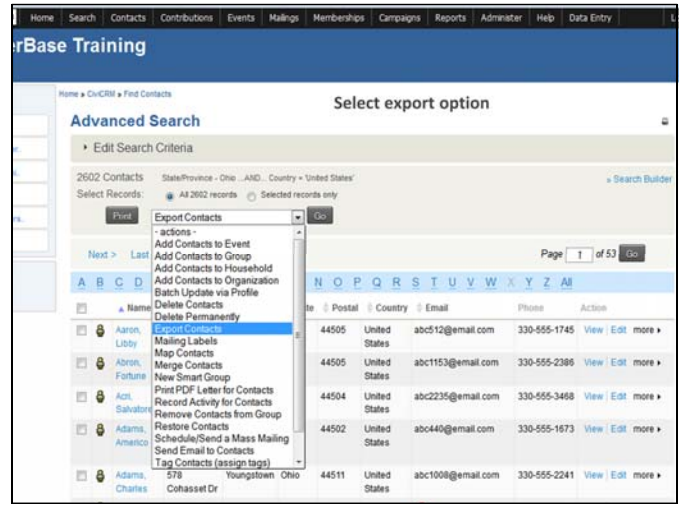
Exporting your data

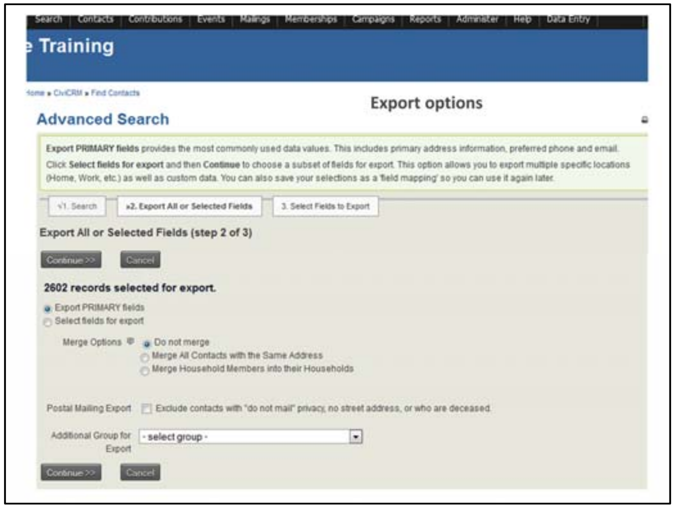
1. Select your constituents using search
   - Advanced Search allows detailed options; Other Searches will work too
2. Get the list; Select Export Action
3. Decide on fields
   - Don't forget the CiviCRM ID aka Internal Contact
4. Export as CSV (comma separated file)
5. Send to other database (VAN, PDI)



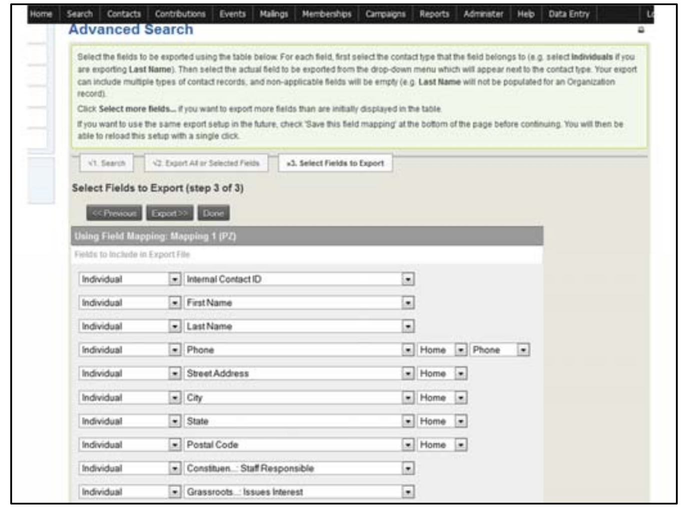
You can use advanced search to find the data that you want to export to the voter engagement system. In this example we're only taking records from our state. Click Search to continue



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

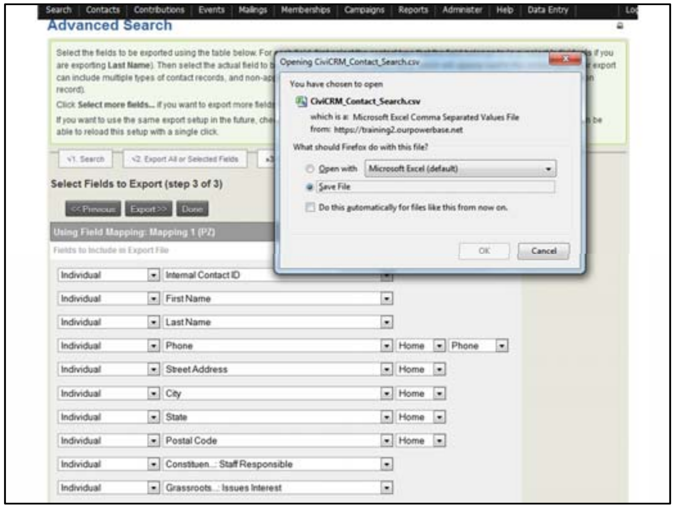


Export Options let you pick which fields you want to export. There is a default of "Export Primary fields", which gives you many columns from the contact. If you are doing this for a match with an outside organization, you are better off selecting "Select fields for export" and press "Continue". You'll 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.

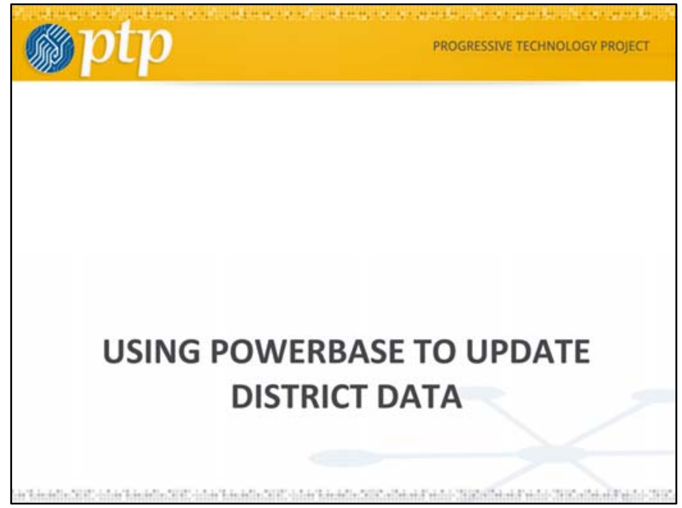


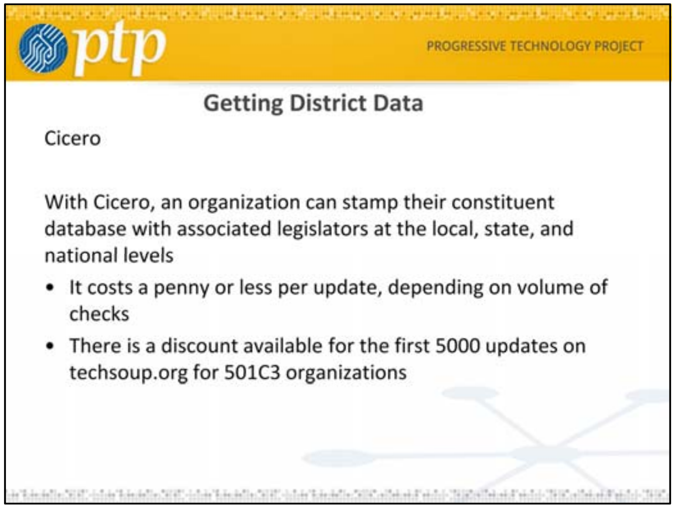
Export field selection

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.



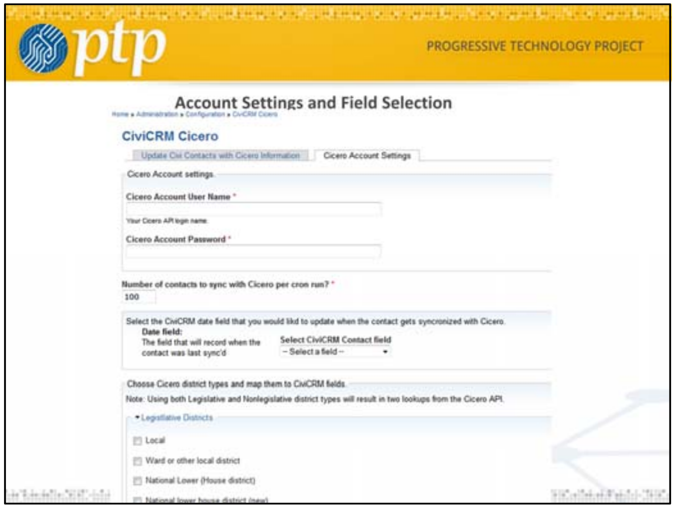
When the export is done, you'll get an prompt to save the file. It will go to the default location that your browser has for downloaded files.



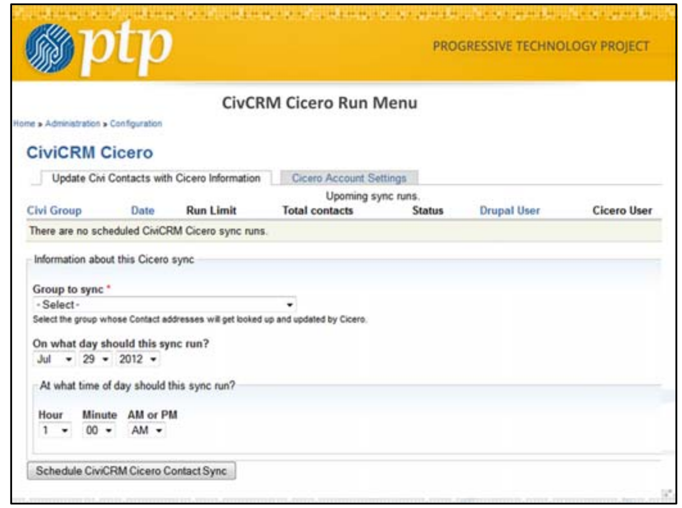


Cicero is a third party software site that PTP links to do the update of district data. The software that PTP has developed is still in beta stage, but it is operational.
You have to pay for the updates. You will need an account to access. PTP may provide a group account to get an economy of scale and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

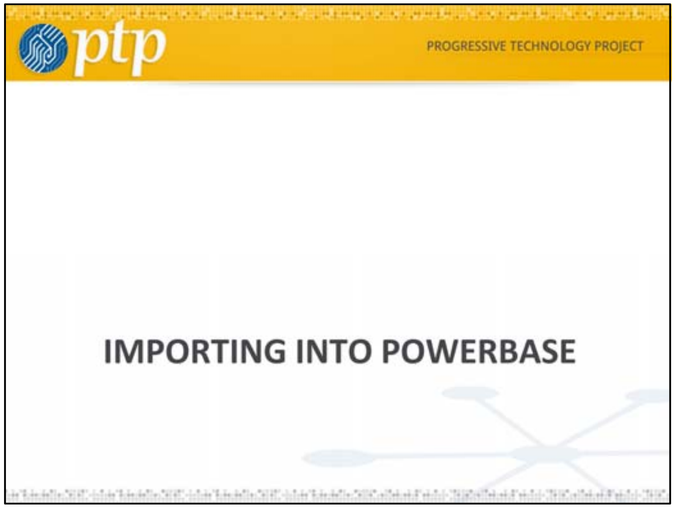
CiviCRM Cicero Menu Location. PowerBase Administrators can get to this menu.

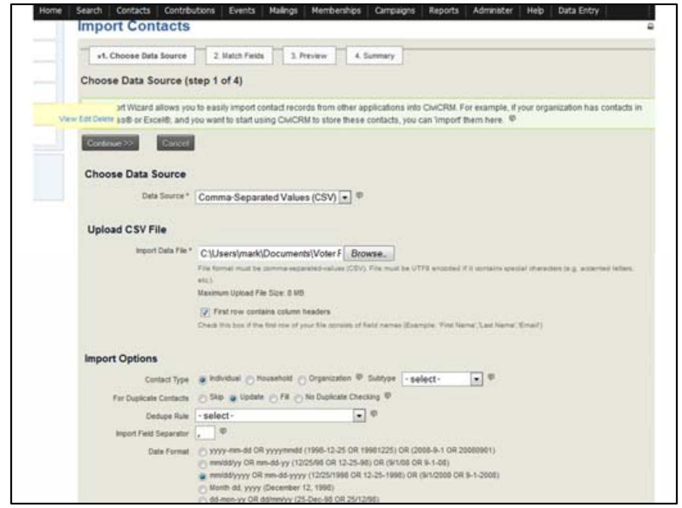


This screen allows you to enter your Cicero account information and create a match list of your PowerBase data fields with the fields in the Cicero database.

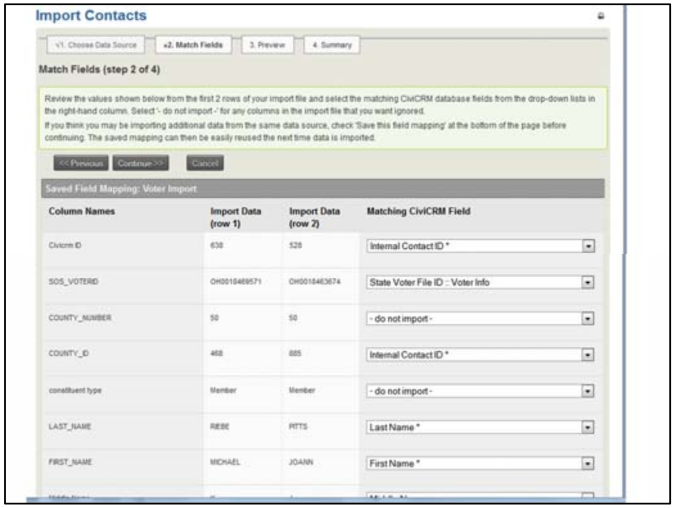


After the system is configured, you can run it as needed from this menu. Set up a group of contacts to be matched beforehand.

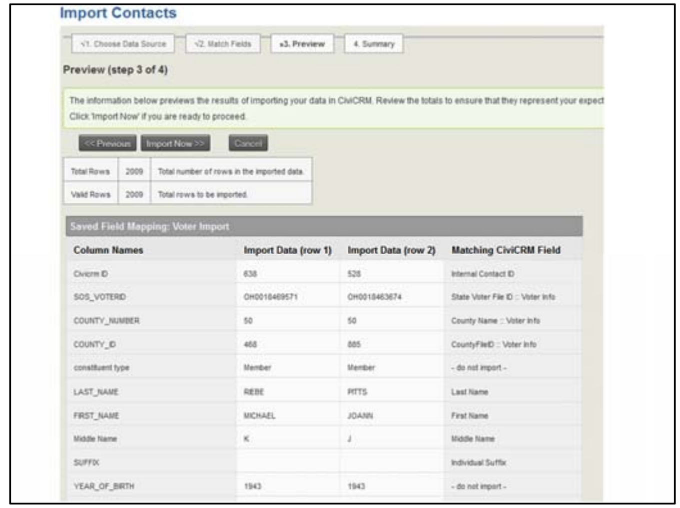




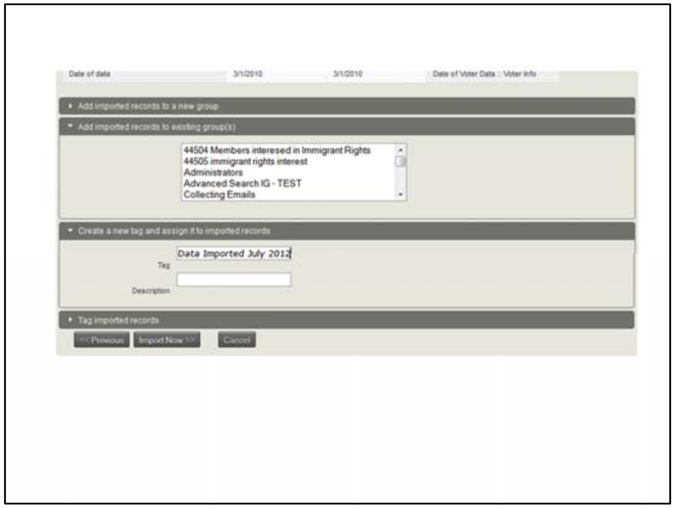
Import file selection screen
Select the import file. You will be updating "individual" records. Check the correct radio button for the date field. If you have saved a mapping from before, select that (at the bottom of the screen and not shown)



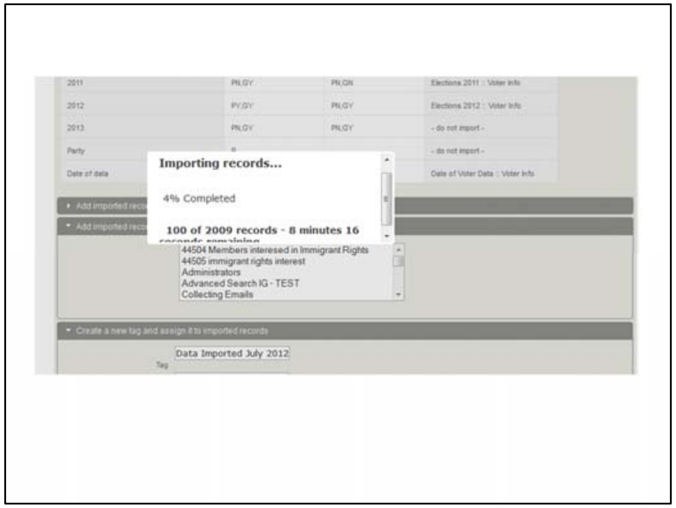
Import match fields screen
Match the columns in the import file to the correct fields in PowerBase. Save the field mapping for reuse.



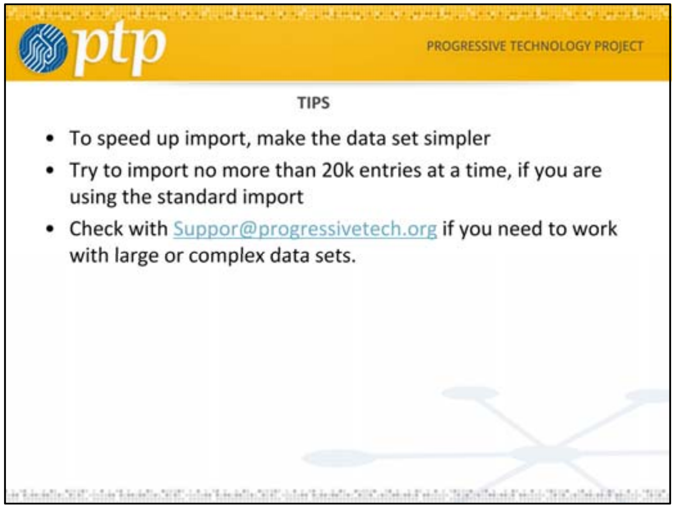
On the import confirmation screen, check the count and review to make sure that the fields are matched properly. Scroll down to add the imported records to a group or tag them.



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



Import Status Screen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TIPS
• To speed up import, make the data set simpler
• Try to import no more than 20k entries at a time, if you are using the standard import
• Check with Suppor@progressivetech.org if you need to work with large or complex data sets.