

Voter Relationship Manager (VRM)

User's Guide v3



1

About This Guide

- **Overview**
- **Purpose**
- **Audience**

Overview

This User’s Guide contains instructions for usage of the Voter Relationship Manager (VRM). It also describes hardware and software requirements of the end user.

Purpose

- This document provides users with the following:
- System environment prerequisites
 - System usage techniques
 - **Instructions and examples for creating lists from the VRM.**

Audience

This Guide is intended for end users of the VRM and anyone that needs an understanding of its function.



2

System Environment

- ❑ **Software Requirements**
- ❑ **Hardware Requirements**

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Software Requirements

Operating System Requirements

The Voter Relationship Manager (VRM) is a browser-based application. Emphasis has been placed on its platform independence. As a result, end users of the VRM can access it from the following operating system platforms:

- **Windows 95, 98, ME, NT, 2000 Professional & XP(recommended);**
- Macintosh System 7.x and higher;
- UNIX & Linux, all versions

Web Browser Requirements

The VRM requires the use of the following web browsers for reliable operation:

- **Internet Explorer 4.x or higher, with 128-bit encryption (recommended)**
- Netscape 4.x or higher
- Mozilla (Any Version)
- Konqueror 3.x or higher

Additional Software Requirements

The VRM requires the use of the following programs:

- A archiving unzip program such as [WinZip](#) or [pkZip](#);
- [Adobe Acrobat](#)



Hardware Requirements

The following is a list of minimum and recommended hardware requirements for the end user:

<i>Minimum Hardware Requirements</i>	
Hardware Component	Minimum Requirements
CPU	Intel Pentium P266
RAM	64MB
Required Disk Space	10MB
Ethernet	56Kbps

<i>Recommended Hardware Requirements</i>	
Hardware Component	Minimum Requirements
CPU	Intel Pentium III 500MHz or better
RAM	128MB
Required Disk Space	10MB
Ethernet	100Mbps

3

Using Voter Relationship Manager

- ❑ **VRM Functional Purpose**
- ❑ **Logging On and Navigating the VRM**
- ❑ **Report Creation**
- ❑ **Accessing/Purchasing Your Reports**
- ❑ **Changing your password and system preferences**

VRM Functional Purpose

What Does VRM Do?

SystemWise’s Voter Relationship Manager gives qualified end users the ability to securely create complex queries (from the State’s voter file) and download them into the appropriate format. A comprehensive System Administration function allows for varying levels of access rights, depending on the specific needs of each user.

Logging On and Navigating VRM

Gaining Access to VRM

To reach the VRM, you will first have to contact the System Administrator responsible your State. Please contact your State Party for these details. Once approved for access, a State Party representative will contact you will Log In information.



Creating a new report

In order to create a new report, click on the “Reporting” tab after you login. From the report list page, click “Create Report” to enter the report creator wizard. During this process, DO NOT use the “BACK” button on your browser. Use the navigation buttons within the application that are labeled “Back”

The screenshot shows the voter management system interface. At the top, there is a navigation bar with tabs for Admin, Reporting (selected), Main, Support, and Logout. Below the navigation bar, a welcome message reads: "Welcome ctowers to the VRM3 (Testing Edition). Please select one of the options below. If you have any questions email vrn-admin@system-wise.com." To the right of the message is a sticky note icon. Below the message is a "Report Management" sidebar with three buttons: "Create Report" (yellow), "Create From Report" (blue), and "Delete Report" (blue). The main content area displays a table of reports with columns: Title, Tracking #, Status, Submit Date, Report Type, and a download link. The table contains one entry: "1. Test1" with tracking number "A16299", status "Available", submit date "Aug/18/2003 12:13PM", and report type "Live Call Phone List (PDF)". A "Download (55 KB)" link is provided for this report. There are two dropdown menus showing "0-30" on the right side of the table.

Step 1: Geographic Criteria

The above list also represents the different service levels that are provided by the VRM system. Each user is given access to some or all of the geographic areas associated with their account. When submitting a request, the user must specify the geographic area they are targeting. The user may choose multiple geographic areas. The user interface will limit the choices of geographic areas based on the user’s service level.

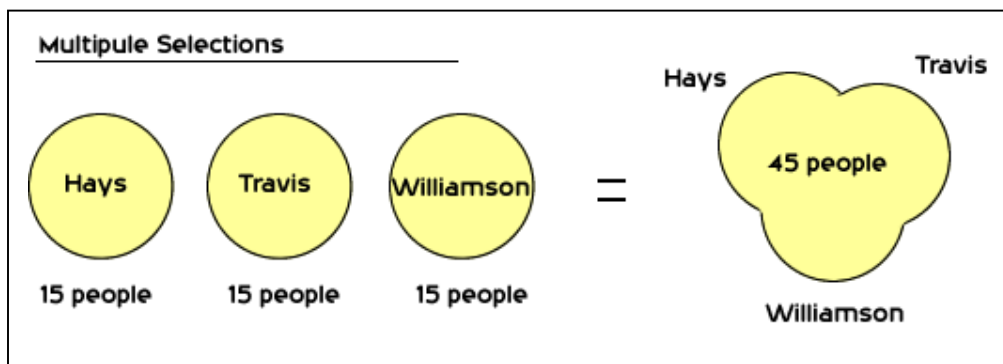
The screenshot shows a "Geographic Restrictions" dialog box. It has a "Cancel" button at the top left. The main text reads: "create an intersection between the scopes. For more help or information on this section or geographic scopes, [click here](#)." Below this text are two sections: "Statewide Geographic Scopes" and "Regional Scope". Under "Statewide Geographic Scopes", there is a "Statewide Scope:" label and a dropdown menu with "Select a State..." and "Texas" visible. Under "Regional Scope", there is a "Regional Scope:" label and a dropdown menu with "Select Regions...", "Region: Central (Central)", "Region: East (East)", "Region: North Central (North Central)", and "Region: Panhandle (Panhandle)" visible.

To select a precinct or neighborhood, you must first select a county. It will then display the precincts for that county. In order to choose a neighborhood, you must first select a precinct and it will then display all the neighborhoods for that precinct. Make sure that you click on the radio button next to the scope you wish to select.

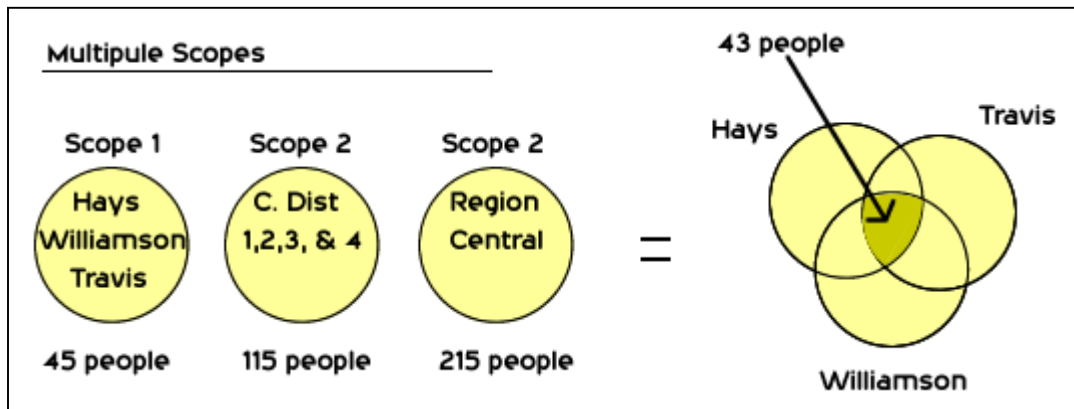
Security Note: You only have access to the scopes set forth by the System Administration. If you want more access, submit a request directly to the System Administrator.

Working with Multiple Scopes

When you select multiple selections within a scope, it will include every selection in your geographic selection. Example, if you choose Williamson, Travis, and Hays **counties**, your report will include everyone in **any** of your selected counties. This is a **Union** or an 'OR' clause.



If you choose geographic locations from different scopes, your report will display individuals who are in any selection made from the first scope that also reside in any selection made in the second or subsequent scopes. This is called an **Intersection** or an 'AND' clause.



Once finished, click “Continue” to move to the next step in the wizard. You must select something in at least one geographic scope and definition before you move on.

Step 2: Administrative Criteria

This section allows you to...

- Select a title
- Enter comments
- Choose a report type
- Choose the output format

The Report Information Administration section: the title is mandatory

Report Information Administration

Report Name:

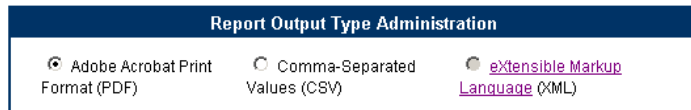
Report Comments (optional):

The Report Type Administration section:

This section allows you to pick the correct product “type” for download. You must select one of these options before moving forward.



The Report Output Administration section: This section allows you to choose from CSV (Comma Separated Value, MS Word and MS Excel compatible) or Adobe PDF. Your System Administrator determines access to these options. XML is now available, yet will rarely need to be used for end user purposes.

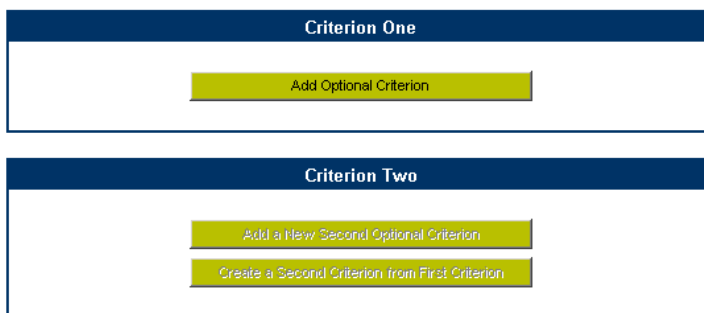


Once finished, click “Continue” to move to the next step in the wizard.

Step 3: Adding Criteria to your Query

This section allows you to add up to two different criteria sets and then Union or Intersect them. The Union and Intersect principals are the same as before. You will only get the choice to utilize the Union and Intersection feature if you create two criteria.

NOTE: Both **Criterion One** and **Criterion Two** are shown side by side here, although you will see only **Criterion One** on your first pass through the system. **Criterion Two** will become available after the first query is complete.



To start entering your first criteria, click on ‘**Add Optional Criteria.**’

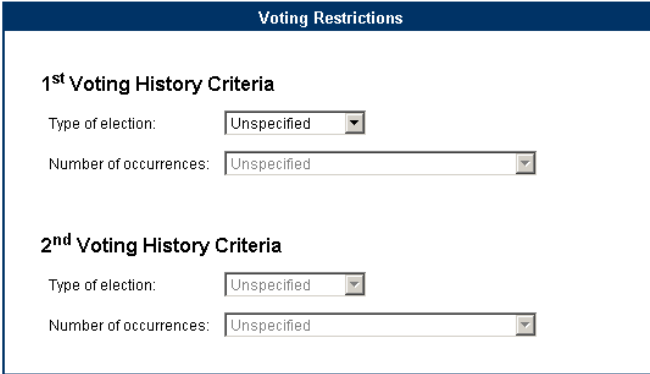
Sub-Step 1 of 2 (of Criteria Insertion): Voting History Criteria

Users are allowed to enter 1 or 2 voting history criteria and specify the registration date. Each criterion has 2 properties: election type and frequency.

NOTE: This section may differ slightly depending on the State in which you reside.

The election type provides the following choices:

- General Election
- Democratic Primary
- Republican Primary
- Either Primary



The screenshot shows a web form titled "Voting Restrictions". It contains two sections for "1st Voting History Criteria" and "2nd Voting History Criteria". Each section has two dropdown menus: "Type of election:" and "Number of occurrences:", both currently set to "Unspecified".

The choices for frequency depend on the election type chosen. For the first 3 election type choices in the above list, the frequency choices are as follows:

- 1 of Last 3
- 2 of Last 3
- 3 of Last 3
- Any History
- No History

For the last election type choice in the above list, the only frequency choice is “No history.” The election type chosen for the second criterion must be different from the election type for the first criterion. The first criterion must be specified while the second criterion is optional.

Examples of **valid** voting history criterion combinations:

General Election – 1 of Last 3	AND	Democratic Primary – 2 of Last 3
Democratic Primary – 2 of Last 3	AND	General Election – 3 of Last 3
Republican Primary – Any History	AND	Democratic Primary – 1 of Last 3
Either Primary – No History	AND	General Election – 1 of Last 3

The **Voting Method Criteria** section allows you to choose how the individuals in your report voted in the last elections. You can choose from early voting, mail voting and election voting. **No Criteria** means that this section will not affect the report.

Voting Method Criteria (optional)

<p>Early Vote</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: 80%;"> <p>No Criteria No early vote At least 3 times At least 2 times At least once</p> </div>	<p>Vote-by-Mail</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: 80%;"> <p>No Criteria No vote by mail At least 3 times At least 2 times At least once</p> </div>	<p>Vote at Poll Election Day</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: 80%;"> <p>No Criteria No vote by mail At least 3 times At least 2 times At least once</p> </div>
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The **Democratic Performance Criteria** section allows you to choose the Democratic performance level of the individuals who are in your report. This is optional module of functionality. If it does not appear while you are using the system, the System Administrator may have chosen not to implement it.

Democratic Performance Criteria (optional)

None

precinct dem perf -

precinct dpi -

precinct edpi -

precinct cpi -

The **Registration Date Criteria** section date provides three different ways to segment the voters. You can select a date to capture all the voters before, after and between certain dates. You can only use one of these at a time though.

Once finished, click “Continue” to move to the next step in the wizard.

Sub-Step 2 of 3 (of Criteria Insertion): Demographic Criteria

In this section, you select the demographic criteria constraints you wish to put upon your query. You do not have to select anything in this section. Everything is optional.

In this section you can define (based on account access) what attributes characterize your individual. Attributes consist of items like income, Intellivote, profession, and democratic ranking. This section is also optional, and may or may not be implemented by the System Administrator.

To select an attribute, you must select the attribute from the right box and populate the values in the second box. Once you populate those values, select one or more values you wish to apply to your report.

Here you can define the voters', in your report, age, gender and ethnicity. The unknown gender selection specifies all the voters in the voter file where the gender is not specified.

Demographic Age Restrictions (optional)

You can select any age between the ages of 18 and 99.

No Voter Age Criteria

Between and

Demographic Gender Restrictions (optional)

No Selection

Male

Female

Unknown

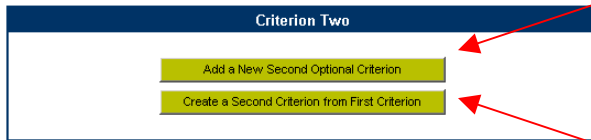
Demographic Ethnicity Restrictions (optional)

By clicking None of the check boxes, you select no ethnic criteria and in turn select all ethnicities to be included in your report

<input type="checkbox"/> Indian-Asian	<input type="checkbox"/> Muslim-American
<input type="checkbox"/> Korean	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Chinese	<input type="checkbox"/> Other Asian
<input type="checkbox"/> Japanese	<input type="checkbox"/> Caucasian
<input type="checkbox"/> Hispanic	<input type="checkbox"/> African-American

Continuation of Step 3: Adding Criteria to your Query

To enter another criteria set, click on “Add a New Second Optional Criterion.”

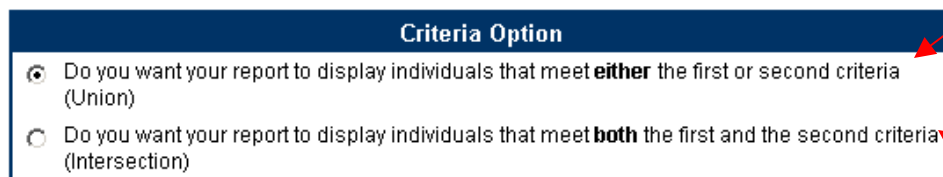


If you want to copy the criteria set from the first one and work from there, click on “Create a second Criterion from the First Criterion.”

Once you create the second Criteria Set, you have the option to **Join** or **Intersect** the two criteria. This option defines how these criteria will work together to produce your report.

The Union:

When you Union two criteria sets, your report will display individuals that meet **either** the first set of criteria or the second set of criteria.



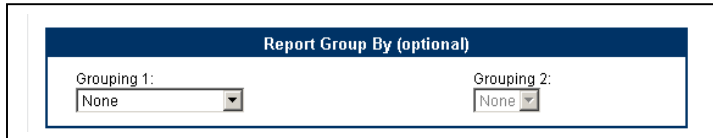
The Intersection:

When you Intersect two criteria sets, your report will display individuals that meet **both** the first set of criteria and the second set of criteria. If an individual does not meet both, they will not be in the report. This feature allows you to strategically define who appears in the report. Displaying the report using and Intersection will narrow the search results.

Step 4: Grouping and Sorting (optional)

This section will only appear if you selected “count” as your report type. This section is completely optional.

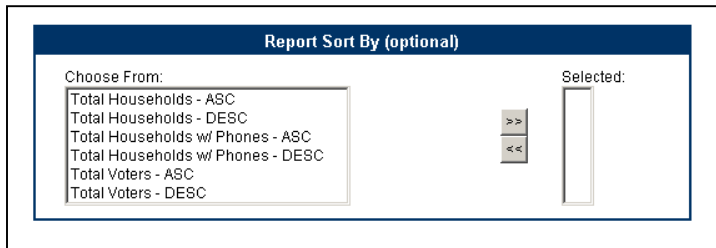
The report group section: The user may specify how data is grouped on the resulting report only for COUNT report types. Counts can be grouped by geographic scope and ethnicity. When choosing to group by geographic scope, the user is required to specify what level of grouping detail they are interested in. The following table lists the available grouping choices for each geographic scope.



Report Group By (optional)

Grouping 1: Grouping 2:

The report sorting section: The available sorting choices are similar to the grouping choices except that users must also specify the sort direction (ascending or descending). To select items to sort by, highlight the selection on the left hand “choose from” box, click the top arrow to move the selection to the selected index. The order in which you select you “sort by” options and move them to the selected box is the way they will appear in the report.



Report Sort By (optional)

Choose From:

- Total Households - ASC
- Total Households - DESC
- Total Households w/ Phones - ASC
- Total Households w/ Phones - DESC
- Total Voters - ASC
- Total Voters - DESC

Selected:

Final: Review Criteria and Information

Review Criteria: In this section, you select the criteria needed to file and run your report. You can click on the "Edit (Step)" link to go back to the step and change the information. For more help or information on this section, [click here](#).

Summary Geographic Constraints	Edit Step 1
Report Scope Criteria:	
<ol style="list-style-type: none"> 1. Congressional District: 01 , 02 , 03 2. Senate District: 01 , 02 , 03 3. House District: 001 , 002 , 003 4. County: ANDERSON , ANDREWS , ANGELINA 	

Summary Information	Edit Step 2
Report Name: Demo Report	
Report Comments: These are the notes for the demo report	
Report Group: 1st Grouping: By Cong. Dist 2nd Grouping: By Ethnic Group	
Report Sort: Congressional District - ASC, Total Households - DESC	
Report Output: PDF	
Report Type: Count	

Criterion One	
Edit Voting Criteria 1	Edit Demographic Criteria 1
1st Voting History Type Criteria: General Election 1st Number of occurrences Criteria: exactly 1 of last 3 2nd Voting History Type Criteria: Rep Primary 2nd Number of occurrences Criteria: At least 2 of last 3 Democratic Performance: precinct dpi (55 - 100) early vote events : Never Voted early vote-by-mail events : Never Voted by mail vote at poll events : Voted at poll 3 or more times Voting Registration Date Criteria: After: 10/10/1993	Demographic Age Restrictions: 18 - 55 Demographic Gender Restrictions : None Demographic Attribute: DA Score 02G Demographic Attribute Criterion: Activist Democrat, Strong Democrat, Weak Democrat, Independent, Weak Republican Demographic Ethnicity Restrictions: Caucasian

Criterion Two	
Edit Voting Criteria 2	Edit Demographic Criteria 2
1st Voting History Type Criteria: General Election 1st Number of occurrences Criteria: exactly 1 of last 3 2nd Voting History Type Criteria: Rep Primary 2nd Number of occurrences Criteria: At least 2 of last 3 Democratic Performance: precinct dpi (55 - 100) early vote events : Never Voted early vote-by-mail events : Never Voted by mail vote at poll events : Voted at poll 3 or more times Voting Registration Date Criteria: After: 10/10/1993	Demographic Age Restrictions: 18 - 55 Demographic Gender Restrictions : None Demographic Attribute: DA Score 02G Demographic Attribute Criterion: Activist Democrat, Strong Democrat, Weak Democrat, Independent, Weak Republican Demographic Ethnicity Restrictions: Caucasian

Cancel	Back	Submit
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This is where you go over what you submitted. Here you can look at the different sections and edit a particular step if you wish to change some of the criteria. When you are satisfied with the report, click "submit" to start your report.

The first section is the Summary of the Geographic scopes and the selections for those scopes.

The second section is a Summary of the Admin information gathered from the report. It includes any sorting and grouping in you created a count report.

The Third Section is a summary of your first criteria set.

If you had a second criteria set, the Fourth Section will display that information.

To Submit Your Report:

The next screen will tell you if the report was submitted properly. If so, click on the link to go back to the list of reports. You will see the report you just created there.

Once the report is done and it is not a count, you can download it directly from the interface.

If you get the following message...

"Report Created Successfully. Click here to return to the report list"

your report went through successfully and you should receive an email if you have that option turned on. SystemWise and your System Administrator monitor the creation of every report. If the report fails, we are notified and will contact you to fix any problems you might have.

Accessing Your Reports

If you click on the Reporting tab, it will take you to the listing of all the reports. From there you can do the following things...

Create Report: This is where you create a new report from scratch.

Create from Report: This is where you select a report by clicking on the radio button by a designated report and create a new report from that selected report.

Delete Report: This is where you select a report by clicking on the radio button by a designated report and delete it from the system.

Tracking #	Title	Status	Submit Date	Report Type	Purchase/Download
<input type="radio"/> 5717	test	Queued	10/09/2002 16:02	Count (PDF)	Not ready for purchase
<input type="radio"/> 1363	test	Complete. Payment Pending	09/10/2002 17:13	Mailing Label (PDF)	Download Preview (\$24.18 Add to Cart)
<input type="radio"/> 1362	test	Available	09/10/2002 17:09	Count (PDF)	Download
<input type="radio"/> 1361	test	Available	09/10/2002 17:08	Count (PDF)	Download
<input type="radio"/> 1357	buy test	Complete. Payment Pending	09/10/2002 16:53	Mailing Label (PDF)	Download Preview (\$3.12 Add to Cart)
<input type="radio"/> 1336	test	No Data	09/09/2002 12:00	Count (PDF)	
<input type="radio"/> 1310	test	Available	08/30/2002 13:15	Mailing Label (PDF)	Download

**note: By clicking on any of the header titles, you can resort the list to aid in finding reports in long lists.*

When you create a report it automatically gets inserted into the report list. When in that list, they will have 4 different statuses: “Queued”, “In Process”, “Complete”, “Available”, and “No Data”.

