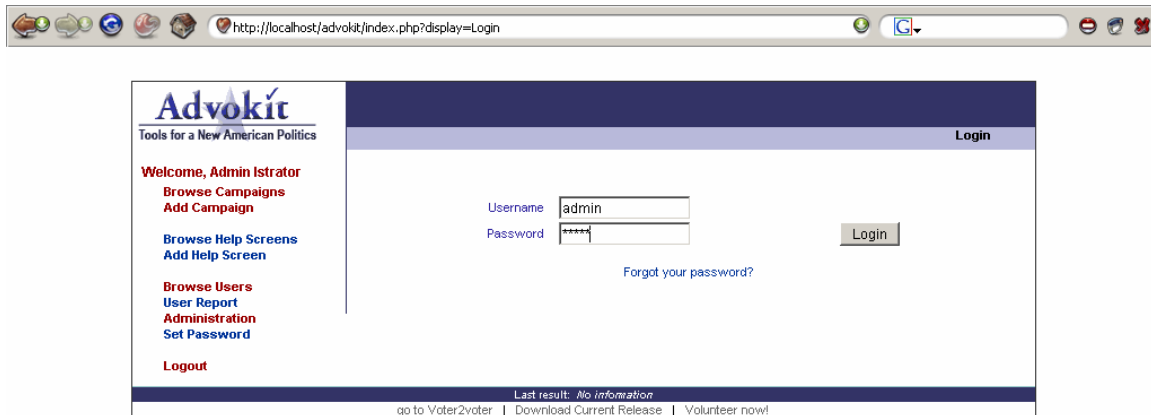


# A campaign leader's tutorial for Advokit – a voter contact management system

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## Login to Advokit for the first time; initial steps

The default username is admin, the default password is admin (case matters).



The first thing to do is to change your Admin Password, otherwise anybody can make any changes to your installation of Advokit. The best way not to forget it is to do it now!

Click on **Set Password** on the lower left of the initial screen.

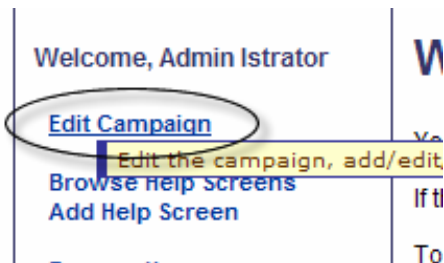


In the screen that comes up, type "admin" for Old Password, and choose a new password and type it twice below, then click **Set New Password**.

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## Initial campaign setup

After changing your password, the first thing you will want to do is set up your first campaign.



Choose **Edit Campaign**

**Edit a Campaign**

Please name this campaign!

Name

Description

Check this box to enable self-registration for open jobs in this campaign

Give your campaign a name. The description is optional, but helps people identify the campaign if you are running more than one.

Self-Registration allows job “openings” to be published publicly on the website. In this way visitors to your Advokit site can volunteer for jobs instead of needing to be assigned to them.

**Edit My Campaign**

[Add a campaign leader](#)

Name

Description

Check this box to enable self-registration for open jobs in this campaign

After naming the campaign, a link will appear enabling you to add a Campaign Leader

[Edit campaign My Campaign](#)  
You may add a new leader to fill this job, or you may [choose from existing users.](#)

Username	<input type="text"/>	Password	<input type="text"/>	Confirm	<input type="text"/>
Nickname	<input type="text"/>				
First	<input type="text"/>	Middle	<input type="text"/>	Last	<input type="text"/>
Address	<input type="text"/>				
City	<input type="text"/>	State	<input type="text" value="(choose state)"/>		
Postal	<input type="text"/>				
Home	<input type="text"/>	Office	<input type="text"/>		
Mobile	<input type="text"/>	Fax	<input type="text"/>	Pager	<input type="text"/>
Email	<input type="text"/>				
IM ID	<input type="text"/>	IM Type	<input type="text" value="(choose IM type)"/>		
Homepage	<input type="text"/>				
Notes	<input type="text"/>				

You can enter a new leader in on this screen, or assign an existing user the job of Campaign Leader. At this point there are no existing users (other than admin) so you will need to create a new Leader. The fields in red are required.

[Edit campaign My Campaign](#)  
You may add a new leader to fill this job, or you may [choose from existing users.](#)

Username	<input type="text" value="Leader"/>	Password	<input type="text" value="*****"/>	Confirm	<input type="text" value="*****"/>
Nickname	<input type="text"/>				
First	<input type="text" value="Leader"/>	Middle	<input type="text"/>	Last	<input type="text" value="Smith"/>
Address	<input type="text"/>				

By default, e-mail is not required (but can be made so through the settings in the advokit.ini file). However, it is good practice to enter emails and encourage others to do the same (otherwise the “mail me a new password” feature will not work and the user

who has misplaced their password will be forced to rely on someone else to get them back into the system).

After you have filled out the required info you can click on “Add A Campaign Leader”. The work area of your screen will now look something like this –



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## Logging in as campaign leader and setting up some organization

[Note that before you can actually begin to make contact lists and contact voters, voter data must be installed. This job is done by the campaign leader. Consult documentation separately on how to prepare and install voter data. For the purposes of the remainder of this tutorial, we will assume that voter data has already been loaded.]

You have now created an account that you can use to manage the campaign. You can now log on using that id to manage the campaign itself. The admin account is powerful, but you will only need it for system administration of Advokit, not for daily use. To get access to the day-to-day features you will be using for your campaign, you need to log in as a Leader. So choose **Logout** on the bottom left, then log back in as the Leader you have created.

The screenshot shows the AdvoKit interface. At the top left is the AdvoKit logo with the tagline 'Tools for a New American Politics'. Below it, a sidebar contains navigation links: 'Welcome, Leader Smith', 'MY JOBS' (Leader (My Campaign)), 'BROWSE' (Contacts, Jobs, Users, Job Types), 'PROGRESS SUMMARY' (Tasks, Voter Contacts), 'ACTIONS' (Email Downstream, Upload Voterfile), and 'MY ACCOUNT' (Edit Profile, Set Password, Logout). A 'My Campaign' link is circled in the top navigation bar. The main content area features a 'Welcome to the AdvoKit homepage!' message, instructions for first-time users (login with admin/admin and add a campaign), a numbered list of 8 steps for getting started, and a link to help@voter2voter.org. At the bottom, there is a search bar showing 'Last result: No information' and a footer with links to 'go to Voter2voter' and 'Download Current Release'.

You will be greeted by your Advokit homepage (which the administrator can edit with the administrative interface). Note the “My Campaign” link at the top of the work area. This is a “crumb bar” that will “expand” and “contract” as you navigate through your campaign – we’ll see more about that in a moment. For now, click on it to be taken to your campaign’s details page.

The screenshot shows the 'Campaign Details' page. At the top right is a 'Campaign Details' header with an information icon. Below it is a 'crumb bar' showing 'My Campaign' with a count of '1'. Underneath are four numbered tabs: '2 Campaign Leadership', '3 Operations', '4 Questionnaires', and '5 Voter Filters'. At the bottom, there is a blue bar with the text 'No operations' on the left and 'ADD OPERATION' on the right.

Let’s take a look at this screen –

- 1) The “crumb bar” will help you will navigate through the teams in your campaign.
- 2) The “Campaign Leadership” tab shows who is occupies the campaign leadership job and is responsible for managing the campaign.
- 3) The “Operations” tab allows you to create, navigate into and manage the individual parts of your campaign. Each activity area in your campaign, like phone banking, tableing, registering, fundraising, door-to-door canvassing, and get out the vote, can have its own operation.
- 4) The “Questionnaires” tab lets you create a set of questions for volunteers to use to help identify likely supporters and possible converts to your campaign. Note that

you may not want to create a questionnaire at the campaign level. Questionnaires can be created at any level, and will be seen on voter contact sheets for that level and below. Most typically, questionnaires are created at the operation level.

- 5) The “Voter Filters” tab allows you to define geographic or demographic criteria to narrow down the pool of voters you are interested in reaching. This can be for “targeting” purposes (defining a particular group of voters that you want to contact with a particular message), or “turf cutting” purposes (dividing the population geographically for efficient division of labor).


For the purposes of this tutorial, create a Get Out The Vote operation by clicking on “Add Operation”.

The screenshot shows a form for creating a new operation. The 'Name' field contains 'GOTV'. The 'Description' field contains 'Voter Contact Work: phone banking, canvassing, etc. Identify supporters and get them to vote'. The 'Starts on' and 'Ends on' fields are empty. The 'Election Date' field contains '5/16/2006'. The 'Polls Open' field contains '7 AM'. There are three checked checkboxes: 'Enable editing of ALL voter information.', 'Enable editing of basic voter information.', and 'In either case, when editing a voter, ENABLE editing of residence address, mail address and political address information.'. The 'Notes' field is empty. The form is set to 'Active'.

All that is required is a name –

- 1) If you provide an election date, a count-down clock to the time that polls open will appear on users’ team and job details pages.
- 2) The start and end dates do not currently have any effect
- 3) The first two check-boxes enable/disable links that let users edit voter information. The first gives access to a detailed editing page where you can edit all information about that voter, while the second limits editing to some basic voter information.
- 4) The third check-box only matters if either of the previous two are checked. When checked, it enables editing of address information for voters. This is included because editing a voter’s address forces a new address record to be created just for that voter, and the ability to search and group voters by household will become compromised – you can prevent that leaving this box un-checked.

After the operation is created, you will be taken to the operation details page, which looks a lot like the campaign details page:

GOTV (details) 

My Campaign > GOTV

## GOTV

Voter Contact Work: phone banking, canvassing, etc. Identify supporters and get them to vote

Election Date: 06/16/2006 29 days and 19 hours remain until polls open!


Leadership Teams Questionnaires Voter Filters Configuration Stats

No teams ADD TEAM

In addition to the “Leadership”, “Teams”, “Questionnaires”, and “Voter Filters” tabs, there are two new tabs for “Configuration” and “Stats”. These are used to view information about how the operation was set up, and about the pool of voters available to this operation and their contact status.

## Adding Teams and Voter Filters

Let’s add a Team Called “AD215” (for the 215<sup>th</sup> Assembly District).

AD 215 (details) 

My Campaign > GOTV > AD 215

## AD 215

Assembly District 215 Field Team  
EDIT TEAM | DELETE TEAM

Election Date: 06/16/2006 29 days and 18 hours remain until polls open!

Leadership Teams Activists Questionnaires Voter Filters Stats

This team reports to	Title
Burns, Deb 508-458-2388 (h) deb@pdcarto.com	GOTV Leader

This team does not have any leaders ADD LEADER

Now let’s add a “filter”. Filters allow you to decide which voters a particular team (and it’s sub-teams) can see. In this case we’ll filter for voters who live in this Assembly District. The team members for this team (and the team’s below) will only be able to see and work with voters in the 215<sup>th</sup> Assembly District. Start by clicking on the “Voter Filters” tab, and then click “add filter”:

## Add a voter filter for subdivision AD 215

My Campaign > GOTV > AD 215

Select the desired voter characteristics, then click "create and apply filter". The new filter will replace any existing filter for subdivision AD 215.

Filter Description

Check this box to include only voter information that was uploaded from a voterfile.

Last name starts with   empty  not empty

First name starts with   empty  not empty

Gender   empty  not empty

Citizen?   empty  not empty

Will vote?   empty  not empty

This page has a lot of fields that allow you to define a filter based on almost any voter attribute that you have; we're showing just part of it here.

Lower down on this page, find the field labeled "State Rep. District". Enter "215" to create a filter for assembly district 215.

Ward number   empty  not empty

US Congress District   empty  not empty

State Senate District   empty  not empty

Census Tract   empty  not empty


Precinct number   empty  not empty

State Rep. District   empty  not empty

Census Block   empty  not empty

Type a description for the filter (e.g. "AD 215"), and click "Create and Apply Filter".

Now let's add a new team under AD 215 – called Precinct 2. Create a filter for that team – called Precinct 2 and in the Precinct number box fill in the value "2".

Precinct 2 (details) 

My Campaign > GOTV > AD 215 > Precinct 2

## Precinct 2

EDIT TEAM | DELETE TEAM

Election Date: 06/16/2006 29 days and 18 hours remain until polls open!

Leadership Teams **Activists** Questionnaires Voter Filters Stats

**Voter Filter** REPLACE FILTER | CLEAR FILTER | EDIT SQL

Description: Precinct 2


```
rp.precinct_number='2'
```

Once you have added a filter for Precinct 2 it should look like the above.

If you click on the “Stats” tab, you will see the number of voters who pass this filter and are available to this team.

## Adding Jobs

Now let’s add an activist Job to this campaign – these are the folks who do the real work! Click on the “Activists” tab, and then click on “add activist job”:

Precinct 2 (details) 

My Campaign > GOTV > AD 215 > Precinct 2

## Precinct 2

EDIT TEAM | DELETE TEAM

Election Date: 06/16/2006 29 days and 18 hours remain until polls open!

Leadership Teams **Activists** Questionnaires Voter Filters Stats

**No activist jobs on this team** ADD ACTIVIST JOB

When you add a job you will see a drop down form for the type of job; chose the “Voter Contact” job type and you will see the following

## Add a activist to new job

My Campaign > GOTV > AD 215 > Precinct 2

Adding new job(s) within the team **Precinct 2** of operation **GOTV**.

Type of Job

What would you like to do?

**1** Add  unfilled job(s) with this job-type.

-- OR --

**2** [Create a job of type \*\*Voter Contact\*\* and fill it with a new activist.](#)

-- OR --

**3** [Create a job of type \*\*Voter Contact\*\* and fill it with an existing activist.](#)

You have the option to either...

1. Create one or more copies of this job type that are not yet filled by any users
2. Create one job of this type and fill it with a new user that you will create
3. Create one job of this type and fill it with an activist chosen from a list of existing users

Let's "Add 1 unfilled...". You will then be taken back to the "team" page and under the Activists tab see something like this:

Precinct 2 (details) ⓘ

My Campaign > GOTV > AD 215 > Precinct 2

### Precinct 2

[EDIT TEAM](#) | [DELETE TEAM](#)

Election Date: 06/16/2006 29 days and 18 hours remain until polls open!

[Leadership](#) | [Teams](#) | [Activists](#) | [Questionnaires](#) | [Voter Filters](#) | [Stats](#)

Activist	Job	Activity	ADD ACTIVIST JOB
	Voter Contact #118	[+]	<a href="#">FILL</a>   <a href="#">ASSUME</a>   <a href="#">DELETE</a>

You can fill the job at any time, by clicking on the "fill" or "+" links, which will present you with options to fill the job with either an existing user, or with a new user that you create.

But for now, let's see what happens when we Assume a job. Click on the "assume" link for this job. This will take you to a user interface that is almost identical to what a user

who has this job will see – you can use this feature to set up a volunteer’s work or to go in and fix something if they get stuck. Let’s take a look at the screen:

The screenshot shows the Advokit web interface. The top navigation bar includes 'My Campaign' and 'Volunteer Now'. The main content area is titled 'Voter Contact (team: Precinct 2)' and 'Voter Contact Job on Precinct 2'. It provides instructions to 'Contact voters for supporter identification and get out the vote' and shows the election date as 06/16/2006, with 29 days and 18 hours remaining. Below this, there are sections for 'Team Leaders' and 'Job holder', both with 'Contact Info' links. A 'Cumulative Voter Filter' section lists filters for Precinct 2, AD 215, and GOTV Democrats. The left sidebar contains a 'MY JOBS' section with an 'ASSUMED JOB' window for 'Voter Contact (0 activists)', a 'CONTACT LISTS' section with an 'Add 10 voters to new list' button, and a 'SEARCH VOTERS' section with a search field and a 'go!' button. The bottom of the sidebar has a 'BROWSE' button.

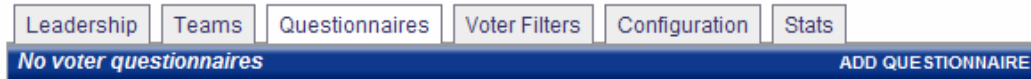
Initially, the job details screen appears in the main display area. But notice the new “Assumed Job” section that has appeared in the sidebar at the left of the screen. Here you can see the information and controls that this activist will have access to. You can browse through any existing contact lists (there are none at the moment), add 10 voters to a new or existing contact list, etc. You can also search for voters to consider adding to a contact list.

Let’s do a search. If you press the “go” button under “Search Voters” without entering any text in the field, all the records in the voter pool will be returned. In this case, we get all the voters who match the cumulative voter filters on this team and the teams above. Only twenty are shown at a time, however. Use the controls at the bottom of the page to see more pages of voters found by this search.



Now we will add a “Questionnaire”. Questionnaires are how you collect information when your activists make contact with voters. You might want to ask if that voter supports your candidate, for example.

Click the “Questionnaires” tab on the GOTV operation details page.



Click on “Add Questionnaire”

Give your questionnaire a name and click “Add new questionnaire”

You will be returned to the team page



Next, add a question “group”. Each Questionnaire can have many question groups, each question group can have many questions. You need at least one group. It doesn’t matter what you call it. Question Groups can be targeted to voters – so one question group could be for all voters, and another could be just for voters in assembly district 215, for example. This lets you use a single voter contact for multiple races..

Add this question group and then you will see an add question screen.

Format **Multiple Choice** 1 Desired Answer **(not applicable)** 4

2 Possible Answers  *Multiple choice only*

3 Goal Number

Check this box to display progress on this question on reporting pages.

5 Question body

1. There are several possible question formats. Multiple choice is the most flexible, but does not support “desired” answers (more on that on item #4).
2. The number of possible answers applies only to multiple choice format questions.
3. The goal number provides a way to assess your performance against a goal you set for yourself. For example, you could decide that you need 1,000 “yes” answers to meet your campaign objectives and ensure a victory. By setting that number here, “Yes” as the desired answer, and checking the box to display progress, you will be able to see a bar graph of your performance with respect to that objective.
4. Select which response you regard as the one that indicates success. Combined with the goal number, this enables graphing of your progress.
5. The question body is simply the text of the question, e.g. “Will you vote for candidate X”. It is not a good practice to enter a long script here however, which just makes the contact sheet long and difficult to manage. Better to attach a script that the activist can print out separately. You can, by the way, enter html tags here, and they will be displayed correctly on the contact sheet and printed questionnaire.

Leadership	Teams	Questionnaires	Voter Filters	Configuration	Stats
<b>Voter Questionnaire</b> <span style="float: right;">ADD QUESTIONNAIRE</span>					
<b>Worcester Votes 2004 Field Operation Questionnaire</b> <span style="float: right;">EDIT   DELETE</span>					
1 question group within this questionnaire <span style="float: right;">ADD GROUP</span>					
1	Supporter Identification	start: 02/08/2006	3	⚙️ ✕	
1	Do you plan to vote on November 2nd?			▼ ✕	
· Yes · No					
2	<style type="text/css"> <!-- .style1 {color:...			▼ ✕	
· Yes · No					
3	Do you support?			▼ ✕	
· Support · Lean Toward · Undecided · Lean Away · Oppose					

Once you enter in a question, you will be returned to the above screen. You can add more questions to that group by clicking on the “?” icon. You can add more groups by clicking on “Add Group”.

To see what all this looks like, dive back down to the My Campaign > GOTV > AD215 > Precinct 2 team and assume the voter contact job as we did earlier. Click on the link to “Add 10 voters to a new list” and then click on the name of one of the voters that you see listed on the new contact list.

**ASSUMED JOB** [X]

Voter Contact  
(0 activists)

**CONTACT LISTS**

**Add 10 voters to new list**

**SEARCH VOTERS**

[input] [go!]

[advanced search](#)

Name	adr	cit	Age	Home	AV?	P	Status / Last Date
X Munson, Colleen - age 37	952 Pleasant Street # 2	Worcester, MA	01602	508-797-0317	N	D	[dropdown]
X <b>Robbins, Arthur - age 61</b>	3501 Knightsbridge Close	Worcester, MA	01609	508-752-1872	N	D	[dropdown]
X George, Patricia - age 61	3602 Knightsbridge Close	Worcester, MA	01609	508-754-2013	N	D	[dropdown]

This will take you to a contact sheet for this voter, which will look something like this:

[Back to contact list](#)

< [Prev Voter](#) [Next Voter](#) >

**ARTHUR ROBBINS 508-752-1872 (H)** [edit] [delete] [key] [globe] [X]

3501 Knightsbridge Close, Worcester, MA 01609 Gender: M Age: 61 Party: D

If contact was attempted but not completed, what happened? Record Attempt

Rejection  Unavailable  Bad Number  Other

If contact was successful, enter responses below and click "Record Answers" at the bottom

**Worcester Votes 2004 Field Operation Questionnaire**

**Supporter Identification** script


1. Do you plan to vote on November 2nd?

Yes  No

Record Answers Clear Answers

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## **Final words**

We hope that this introduction has been helpful! Advokit is a powerful application, and we glossed over and skipped a number of features in this tutorial. We would encourage you to explore each screen as you are learning your way around Advokit, and to do this early in your campaign preparations! There are some online help screens that you can access when you see the  button at the upper right portion of the page. Consult other documentation for detailed information for activists and how to install voter data. And good luck on your campaign!

Dan Robinson and Pat Dunlavey