

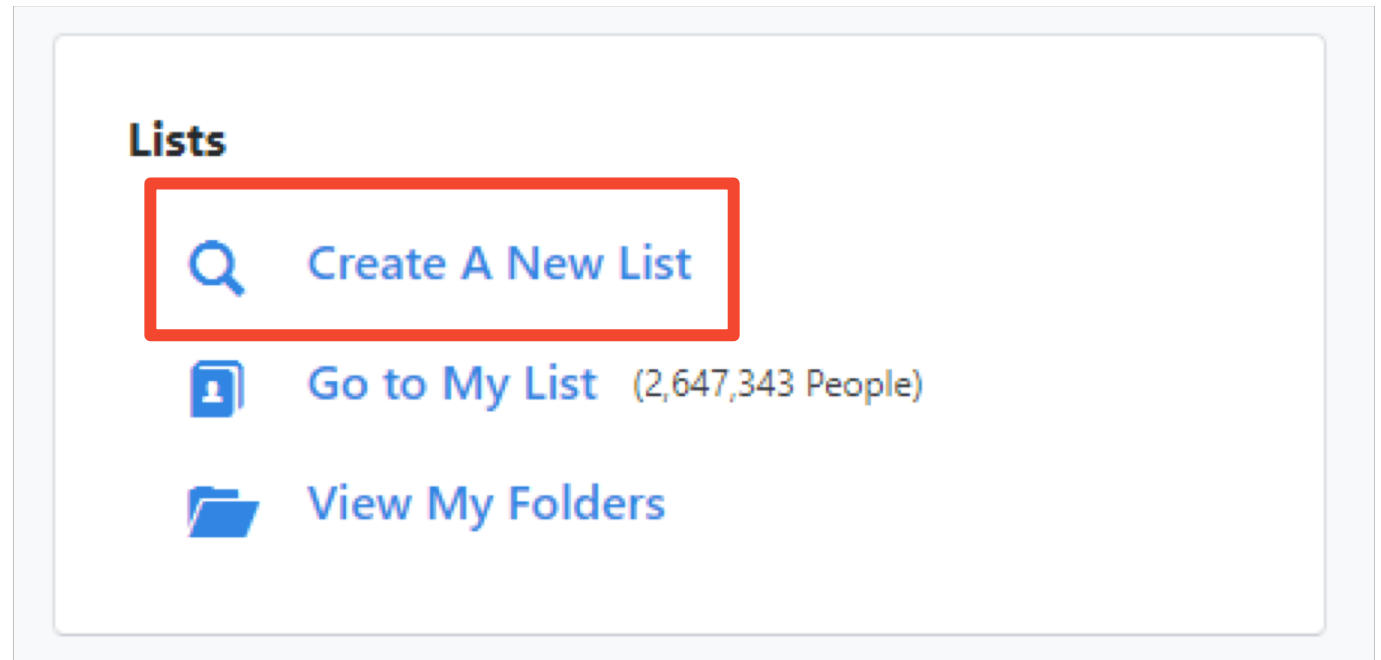
**NCDEMOCRATS**

# CHECK-IN

## BEFORE THE CONVENTION: Making a List of District Convention Delegates

In this step, you will make a printed list of District Delegates you can use for check-in at the convention.

Select "Create A New List" on the main menu



Select the target for "2019 District Convention Delegates"

▼ Targets ★

Include people in  of the following:

- NCDP: PLEO - County Executive Committee : County Executive Committee
- NCDP: PLEO - Precinct Meeting Targets : Party Officials and Past Attendees
- NCDP: PLEO - Precinct Meeting Targets : Expanded Engagement Target
- 2019 County Convention Delegates : 2019 County Convention Delegates
- 2019 District Convention Delegates : 2019 District Convention Delegates

Go to the "Home Districts" section and select your district

FAVORITES

▼ Home Districts

Search for Districts that have been applied to a person's physical Voting Address.

Media Market

County

City

**Congressional** 3

State Senate

State House

District Court

Superior Court

On the right side select the green "Run Search" button

← Step 1: New Search

**Districts**  
Congressional = 3

**Targets**  
Target = 2019 District Convention Delegates: 2019 District Convention Delegates

**Registration**  
Registration Status = Registered Active or Registered Inactive or Applicant

**Suppressions**  
exclude Deceased  
and include Good or Bad Voting Address  
and include Good or Bad Mailing Address  
and include NCOA Mailing Address  
and include Do Not Email  
...less

🔍 Preview My Results

+ 61 People

+ Add Step

▶ Run Search

# Select the "Print" button

CONTACTS

## My List

51 People    49 Home Phones    42 Doors    42 Mailboxes

Edit Search ▾    Load List    Save List As    **New Search**

**Print**    Letters    Labels    Calls    Export    MiniVAN    Counts    Cut Turf    Split    Grid    Script    Form    Task    Bulk Apply    Copy    Map    Advertising

SMS

A screenshot of a web application interface for managing contacts. The interface is titled 'CONTACTS My List'. It shows statistics for different contact types: 51 People, 49 Home Phones, 42 Doors, and 42 Mailboxes. On the right side, there are buttons for 'Edit Search', 'Load List', 'Save List As', and 'New Search'. Below these, there is a horizontal row of 17 icons representing various actions: Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Cut Turf, Split, Grid, Script, Form, Task, Bulk Apply, Copy, Map, and Advertising. The 'Print' button is highlighted with a red rectangular box. Below this row, there is a separate button for 'SMS'.

- Under "Report Format"  
Select -- "2019 District Convention Report"
- Under "Contacted How"  
Select -- "Meeting"
- Give your title a unique name
- For Sort Order1 select  
"county" and select "Asc" and  
"Page Breaks" \*\*
- For Sort Order2 select  
"Name" and select "Asc"

DATA ENTRY  
**Print**

Report Format\* 2019 District Convention Report [Preview](#)

Printing checkin lists for District Convention.

Script

Contacted How\* Meeting

Title Wake County District Convention Report

MiniVAN Campaign

Clear Sort Order

Sort Order1 Precinct  Asc  Desc  
 Show Group Header  Page Breaks

Sort Order2 Name  Asc  Desc  
 Show Group Header  Page Breaks

\*\*Doing sort order will break the list by precinct, and put names in alphabetical order, so check-in is more easily organized.

On the next  
screen select  
"My PDF Files"

## PDF File

### Your PDF is being created.

If you have a large list, the PDF creation process may take a few minutes to complete. To check on your file(s) at any time, go to the [Main Menu](#) and look for a link that says [My PDF Files](#).

Or go back to [My List](#).

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Select the "Download File" button next to the PDF you want printed

DATA EXPORTS  
**PDF Print Jobs**

Created From: mm/dd/yyyy Created To: mm/dd/yyyy Created By:

Type:  Title:  Map Region Source Folder:

[Remember Filters](#) [Clear](#) [Refresh](#)

[PDF Printing Instructions](#) [Download Selected Files](#)

<input type="checkbox"/>	Title	Type	Created	Created By	File Size	Download Link	Delete
<input type="checkbox"/>	Wake County District Convention Report	List	4/10/19 11:15 AM		68 KB	<a href="#">Download File</a>	<a href="#">Delete</a>

1 PDF Print Job · 1 Page

**NCDEMOCRATS**

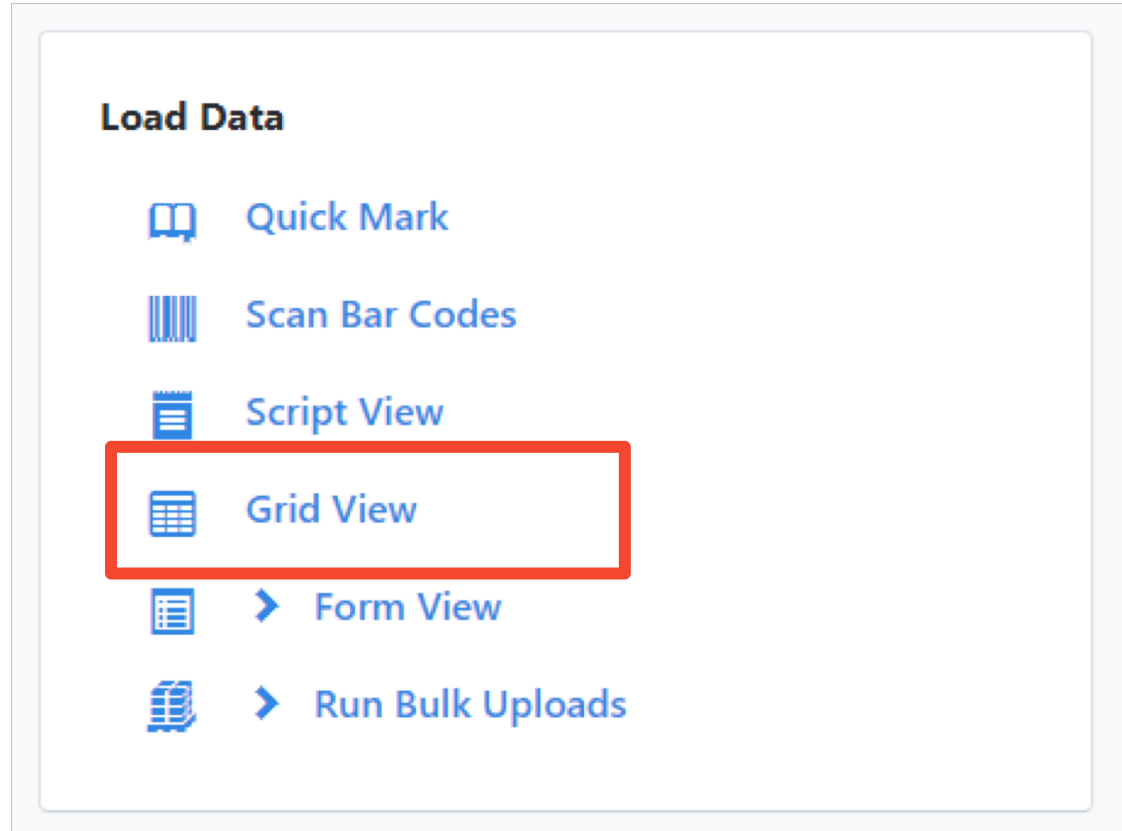
## **DATA ENTRY**

### **AFTER THE** **CONVENTION:**

**Enter Data Grid View**

In this step, you will use a pre-made script to quickly check off activist codes for people who attended/were elected. It will connect to names on your check-in list.

On the main menu select "Grid View" under "Load Data"



In the bottom left hand corner of your packet enter the list number

35.3 Precinct Meeting · List 23043711-43182 · Page 1

Generated 12/4/17 5:10 PM

DATA ENTRY

### Grid View

Which list do you want to use?

Use My List

Let me enter a List Number  -

Use Quick Look Up

Next

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- Select the "2019 District Convention Report" Script
- Set the "Date Canvassed" as the meeting date
- Select "Contacted How" as "Meeting"

DATA ENTRY  
**Grid View**

Script\* 2019 District Convention Reporting

Canvasser\* Szufлита, Vicky [Add New Canvasser](#)

Date Canvassed\* 4/10/19

Contacted How\* Meeting

Clear Sort Order

Sort Order1 Precinct  Asc  Desc

Sort Order2 Name  Asc  Desc

# Select the correct activist codes for individuals

---

Name	Address	City	Party	Age	Phone	Result	Canvasser	2019 CD Attend	19-21 CD Chair	19-21 1st CD VC
[REDACTED]	[REDACTED]	New Bern	D	[REDACTED]	(910) [REDACTED]	⌵	Last Name, First Name ✎	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[REDACTED]	[REDACTED]	New Bern	D	[REDACTED]	(252) [REDACTED]	⌵	Last Name, First Name ✎	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[REDACTED]	[REDACTED]	New Bern	D	[REDACTED]	(252) [REDACTED]	⌵	Last Name, First Name ✎	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NCDEMOCRATS**

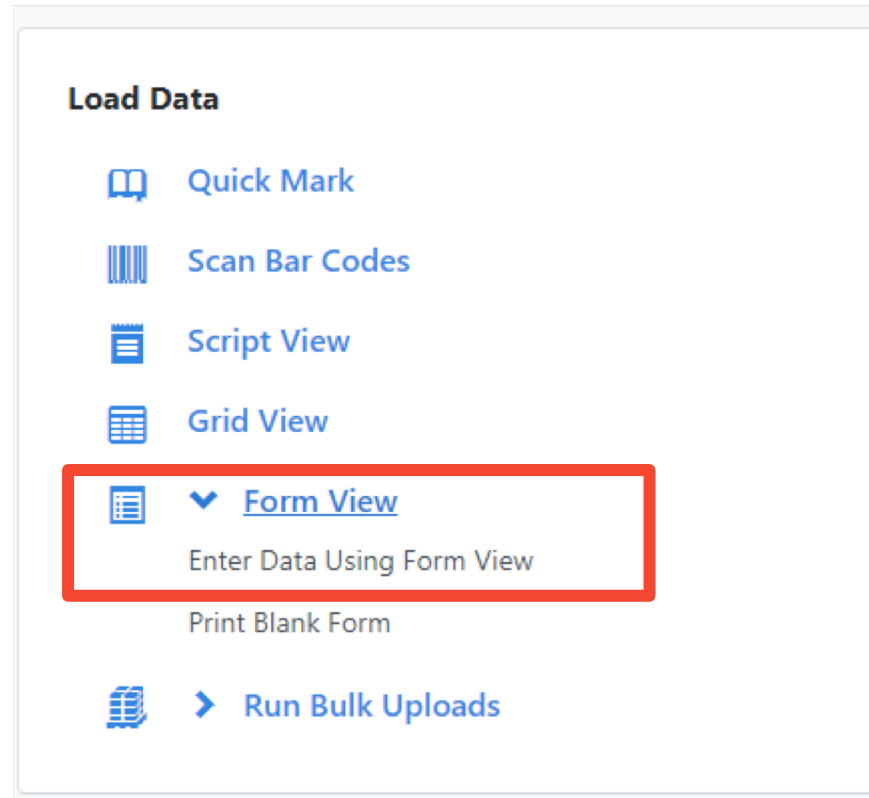
## **DATA ENTRY**

### **AFTER THE CONVENTION:**

**Enter Data Form View**

This is for applying activist codes by individual, if you did not create a check-in list of delegates, or if a person was not on that list. In this step, you will use a pre-made form to quickly check-off activist codes for people who attended and were elected.

Select "Form View" under "Load Data"



The screenshot shows a 'Load Data' menu with the following items:

- Quick Mark
- Scan Bar Codes
- Script View
- Grid View
- Form View** (highlighted with a red box)
  - Enter Data Using Form View
  - Print Blank Form
- Run Bulk Uploads



Select "Use Quick Look Up"

DATA ENTRY  
**Form View**

Which list do you want to use?

Use My List

Let me enter a List Number  -

Use Quick Look Up

Scan Bar Codes

Next

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- Select the "2019 District Convention Form"
- Set the "Date Canvassed" as the meeting date
- Set "Canvass Type" as "Meeting"

---

**Form View**


Form\* 2019 District Convention Form

Canvassed By\* Szufliita, Vicky NC [Add New Canvasser](#)

Date Canvassed\* 4/10/19

Canvass Type\* Meeting

Enter the name and county for the person then hit the "Blue" search button

[Main Menu](#) / [Form View](#) / [Quick Look Up](#) [Help Wiki](#) 

CONTACTS

### Form View

Last Name	First Name	Middle Name	Nickname	Phone	DOB	ID
<input type="text" value="Riley"/>	<input type="text" value="Michael"/>	<input type="text" value="Calahan"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Voter File VANID"/>

Voter File VANID


Street Address	City	Zip	Email	County	County Voter ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value=""/>	<input type="text"/>

Use SmartName search technology  Exclude Unregistered Voters

Too many results; please be more specific.

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# Select the name of the person once you have found them

Main Menu / Form View / Quick Look Up Help Wiki 

CONTACTS

## Form View

Last Name	First Name	Middle Name	Nickname	Phone	DOB	ID
<input type="text" value="Riley"/>	<input type="text" value="Michael"/>	<input type="text" value="Calahan"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Voter File VANID"/>

Voter File VANID

Street Address	City	Zip	Email	County	County Voter ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use SmartName search technology  Exclude Unregistered Voters

Name	Address	City	Age	Phone	Email
<span style="border: 2px solid red; padding: 2px;">Riley, Michael Calahan</span>	900 E Six Forks Rd Unit 202	Raleigh	23	(919) 475-7313	

1 Person · 1 Page

Enter the activist codes, phone numbers,  
or emails you have for them

<b>District Attendance Activist Codes:</b>	<b>District Convention Activist Codes:</b>
Meeting Delegate <input checked="" type="checkbox"/> 2019 CD Delegate	<input type="checkbox"/> 19-21 1st CD VC <input type="checkbox"/> 19-21 2nd CD VC <input type="checkbox"/> 19-21 3rd CD VC <input type="checkbox"/> 19-21 CD Chair <input type="checkbox"/> 19-21 CD Min Affairs <input type="checkbox"/> 19-21 CD Sec <input type="checkbox"/> 19-21 CD Treasurer
District Attendee <input type="checkbox"/> 2019 CD Attend	

Note: "2019 CD Delegate" should already be checked, since attendees of the Convention should all be CD Delegates (marked after the county convention).