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Overview

This article walks through the steps to use the new (*released Oct. 2015*) **poll watching feature** to flag voters, using your mobile device who are voting in your current election.

The feature is bundled in with the rest of the <u>Mobile Base Camp</u> web app tools and can be accessed with an mobile device that has internet connectivity, and a web browser.

Tip: To save time you can create a **single** database <u>user account</u> with very limited security access for just poll watching. Then distribute the login credentials between all of your poll watchers. *This requires appropriate* **security clearance** to setup new users (normally not a good practice with your database but in this case if you limit the access correctly it makes the process much more efficient).



Prerequisites

IMPORTANT: Prior to using this feature you need to:

- Contact our support team at (support@trailblz.com) or (1-866-909-8700) with the request to set you up with this feature from our end.
- Let us know which **election** in your database you need activated.
- If you only require certain **precincts** to be listed in the poll watching drop-down list, we'll also need a list of those specific ones (this can be especially common with a very large database).

We will activate the feature on our end, and also make sure that your precinct data is up-to-date, and that the naming convention of your precincts is consistent.

Tip: It's a good idea to request this sooner than later so that all of your volunteers have time to learn how to log in via their mobile device, and how the results can be utilized with queries, and pivot reports once polling commences.



<u>Steps</u>

Navigate to your **Elections** list, verify that the election you're polling for is created (*otherwise <u>create a new one</u>*), and then contact us with the name of the election you need activated. In my example I used my **Primary 2016** election.







If you only want certain **precincts** within your database to display in the drop-down on Mobile Base Camp you'll need to send us that list as well. *This can be altered election by election on our end.*

Your current list of precincts can be viewed by following **Application Menu > System Manager > Lists > Precincts**:



Precinct list, where you can select which ones you need enabled for poll watching, otherwise we'll enable all that are in the database.

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If you don't want to go through and select which precincts to include in the poll watching app we'll enable all that are in the database.

Once these steps are finished, we'll update you that it's ready (*this can take anywhere from a couple hours to a few days depending on the size of the database*).

As soon as we give you the go-ahead you can have your poll watchers log into Mobile Base Camp at www.trailblz.info/YourDatabaseName/Mobiin my example I logged in at http://www.trailblz.info/democampaign_joel/mobi.



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(Your secure login is hosted at www.trailblz.info/YourDatabaseName/mobi)

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This is what it looks like *prior* to poll watching being activated:



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Once we complete the steps above it will look like this:



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Click on the **[Poll Watching]** button, and select the **precinct** from the drop-down where you will be stationed. *In my example I chose the first one in my list "Alliance 1-A"*.



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Select the precinct from the drop-down where you'll be stationed.	Select Precinct: ALLIANCE 1-B ALLIANCE 1-C ALLIANCE 1-C ALLIANCE 2-A ALLIANCE 2-B ALLIANCE 2-D ALLIANCE 2-D ALLIANCE 3-A ALLIANCE 3-B ALLIANCE 3-C ALLIANCE 3-E ALLIANCE 4-A ALLIANCE 4-A ALLIANCE 4-B ALLIANCE 4-D ALLIANCE 4-F	Precincts Total: 309



Tap on the [Start Polling] button to proceed.







You can search by **Last Name** as voters finish voting, then tap on their record to open it. *In my example I searched this precinct for "Anderson" and selected "John H Anderson"*.



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Tap on the vote so you can flag	r's record after they vote them as having voted.		
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Check the box for **Voted**, and then tap on **[Save and Close]** to finish. *If you make a mistake you can open the voter's record back up and uncheck that box*.





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Once the voter is marked as 'voted' the background of the row in their record will turn slightly yellow. *My example is below.*



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Repeat these steps until the polling places close. The next steps show how to utilize the data that's being collected. *These final steps assume you have access to your database and not just web passed polling access.*

Tip: To use the Mobile Base Camp web app more effectively take a look at <u>this article</u>. It will show you how to configure your device with shortcuts to quick-launch the 'app', and how to keep the device screen on longer so you don't need to log in over-and-over.

In your database navigate to the **Voters** list > **Attribute** tab.



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There will be a new attribute folder called "**Poll Watch** – *Name of Election*" with a new attribute item called "**Voted**". *In my example the attribute item is called* "*Poll Watch* – *Primary 2016*".



This attribute folder and item get created automatically once the polling feature is activated for an election.

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To see everyone who's voted in the current election check the attribute box in the '**Yes**' column, and then click [**Search**]. In my example it returned 10 voter records who had so far voted in my mock election.



How to Setup and Use the Mobile Poll Watching App

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This basically sums up the steps to setup poll watching, using the mobile app, and run queries by the results as they're collected. Continue reading to learn how to build a **pivot** report off the data you collect - for instance you can get quick totals of voters by precinct, and getting even more advanced by adding in their party types.

Steps to Build a Pivot Summary Report that Details Voter Counts by Precinct

In the **Voters** list search for everyone who has voted in your current election, you'll do this by using the new attribute detailed in the steps above. *In my example it returned* **3,157** *voters for my mock election.*



Search and load all voters who have voted in your current election.

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		V	237	Agar	<u>Tanis</u>	V	<u></u>	4204 Boone Ave N		New Hope	MN	55428-4837	1/1/1945		Hennepin	05	45	45A	1149954
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Click on the Format drop-down and select Columns.



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Under the **Voter** 'table' select **Party** from the list of columns.



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In the lower-left under the **Joined Tables** highlight the **Precinct** table, and then select **Precinct Name** from the list of columns on the right.



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Click **[OK]** once the columns for Precinct Name and Party have been selected.



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Scott	David	<u></u>	11281 Osage St NW		Coon Rapids	MN	55433	1/1/1979	М	Anoka	03	36	36B	3676439	REP	COON RAPIDS W-3 P-1
Geraldine	Eddie	<u></u>	3542 Grimes Ave N		Robbinsdale	MN	55422	1/1/1957		Hennepin	05	45	45B	3882426	DEM	ROBBINSDALE W-4
Robert	Earl	<u></u>	3542 Grimes Ave N		Robbinsdale	MN	55422	1/1/1956	М	Hennepin	05	45	45B	3882425	DEM	ROBBINSDALE W-4
Kenneth	L	<u></u>	4204 Boone Ave N		New Hope	MN	55428-4837	1/1/1944	М	Hennepin	05	45	45A	1149953	DEM	NEW HOPE P-04
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Chris	Andrew	<u></u>	1945 Major Dr		Golden Valley	MN	55422	1/1/1974	М	Hennepin	05	45	45B	1592924	DEM	GOLDEN VALLEY P-1A
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To get total voters by precinct with a breakdown of party, start by clicking the **[Pivot]** button.

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Under the Row Labels tab select Precinct Name.



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Under the Column Labels tab click Party.



Create Pivot Table	ata			8
City County First Name Gender ID Incl Last Name LD MI Precinct Name Reg Id SD		Pivot Table Colum Column Party	ins Heading Party	
Overall Progress Waiting for user input Step Progress				
			💿 ок 🧕	Cancel



Under the **Data** tab click **Show count of occurrences** and then click **[OK]**.



		D:		
Show count of occurrences		Pivot Table Data		
Columns		Column	Headin	g
Incl				
	\sim			
Overall Programs				
Waiting for user input				
training for boor input				
Step Progress				



Your final pivot report will now display counts of voters, by party type, for each of the precincts you're polling. *My example is below.*



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=	Sort	🌐 Format 👻 🏝 Export 🚕 Prir	t 🛛 🧰 Chart						
/ot	er Cou	nt by Precinct Name by Party							
	Incl	Precinct Name	COUNT (*)	COUNT (*)	COUNT (*) DEM	COUNT (*) IND	COUNT (*) OTH	COUNT (*) REP	1
•	V		1,351	3	556	3	305	484	
	V	0010 - 1-B BAUDETTE CITY	1	0	0	0	0	1	
	V	0015 - 2-A GUDRID UNORG	1	0	1	0	0	0	
	V	0020 - 2-B BAUDETTE CITY	1	0	0	0	0	1	
	V	0040 - 4-A WHEELER UNORG	1	0	0	0	0	1	
		0045 - 5-B ZIPPEL UNORG	1	0	1	0	0	0	
		0050 - 5-A UNORG	2	0	0	0	0	2	
	V	0055 - 3-B WILLIAMS CITY	1	0	1	0	0	0	
	V	0065 - 2-C UNORG	1	0	0	0	0	1	
	V	ACOMA TOWNSHIP	3	0	1	0	0	2	
	V	ACTON TWP.	1	0	1	0	0	0	
	V	ADA W-1	1	0	1	0	0	0	
	V	ADA W-2	1	0	0	0	1	0	
	V	ADAMS	1	0	0	0	0	1	
	V	ADAMS TWP.	3	0	1	0	0	2	
	V	ADRIAN	2	0	1	0	1	0	
	V	AKELEY	2	0	0	0	1	1	
	V	AKELEY TWP.	1	0	1	0	0	0	
	V	ALEXANDRIA W-5 P-1	1	0	0	0	0	1	
	V	ALVARADO	2	0	0	0	0	2	
		ANDOVER P-10	1	0	1	0	0	0	
	V	ANN LAKE TWP.	1	0	0	0	1	0	
		ANOKA P-2	1	0	0	0	0	1	
		APPLE VALLEY P-12	1	0	0	0	0	1	
	V	ARAGO TWP.	3	0	2	0	1	0	
		ARBO TWP	3	0	0	0	0	3	
	V	ARDEN HILLS P-1	1	0	1	0	0	0	
	V	ARGYLE	1	0	1	0	0	0	
	V	ARTHUR TWP.	3	0	1	0	0	2	
	V	ATHENS TWP	2	0	2	0	0	0	
	V	ATWATER	7	0	1	0	0	6	
	V	AUGSBURG TWP.	1	0	1	0	0	0	
	V	AURDAL TWP	4	0	0	0	0	4	
	V	AUSTIN TWP.	3	0	1	0	0	2	
	V	AUSTIN W-1 P-1	1	0	1	0	0	0	
	V	AUSTIN W-1 P-2	1	0	0	0	0	1	w.trailblz.com
	V	AUSTIN W-2 P-1	5	0	3	0	0	2	
	V	AUSTIN W-2 P-2	6	0	2	0	1	3	
	V	AUSTIN W-3 P-1	4	0	2	0	1	1	
		AUSTIN W-3 P-2	3	0	0	0	0	3	



From here you can print the report, export, or graph it. This concludes all the steps, the related resources below link to a variety of other articles and videos that have to do with the Mobile Base Camp app.



- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources



Related Resources

Article: <u>Tips and Tricks for using Mobile Base Camp – Add Shortcuts to your Home Screen, Adjust Device Settings to Keep the Screen on, and More</u>
Article: <u>Mobile Base Camp – Mobile Canvassing</u>
Article: <u>Mobile Base Camp – Contact Search</u>
Article: <u>Add an Election to Your Trail Blazer Database</u>
Article: <u>Election Day Procedures | Poll Watchers</u>
Video: <u>Mobile Canvassing</u>
Video: Canvass Your Neighborhood With Our Mobile Canvassing App

Trail Blazer Live Support

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- Email: <u>support@trailblz.com</u>



- **Facebook:** <u>https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</u>
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.