

PDI Version 3.0 Release Notes

Version 3.0 is a major step forward in the evolution of our PDI software application. This release includes fixes to known bugs, improvements to existing functionality and work flow, the introduction of new functionality, and an overhaul of the program menu and navigation. All of the changes were based on user feedback and a comprehensive analysis of how the program was utilized in 2016. We believe that this version makes the program more powerful and easier to use.

There will be a brief learning curve, but we are confident that you will quickly get hang of it and love this new version. I speak for the entire PDI team when I say we are available to answer any questions and provide extensive support as you begin your journey using PDI 3.0.

The purpose of this document is to help you with the transition process. We have identified the most significant changes and additions to the program in enough detail to keep you productive. If needed, the program's help page offers additional resources.

What's Changed - Home Page and Navigation Menu

You will immediately notice that the program's home page looks completely different. Do not panic. This new home page dashboard has many advantages, and you can easily change or hide every part of the page.

At the top of home page, you will notice a new navigation menu bar capable of directing you to any page in the program. This menu containing seven categories and a link to the File Pickup Page will appear throughout the program. Please take a minute to review the new menu layout. This will be the most disruptive change in the new version, but you will quickly appreciate its simplicity and efficiency.


Sample Campaign
California State

Sign Out

290 Days To Election Day

Voter Data Tools | Contact Data Tools | Phone Canvassing | Calendar | Emails | Web Forms | Admin | File Pickup

<u>Voter Data Tools</u> Lookup People Create Voter Universes Create Lists & Files Create Lists & Files Create Custom Lists Create Custom Files Data Entry Count Reports Standard Count Report Crosstab Report Precinct Report Flag Report Shared Data Report Child Account Report Mapping/Canvassing Mapping/Canvassing Manage Carved Areas Manage Mobile Projects Data Visualization New Registration New Reg Entry Search New Applicants New Reg Stats	<u>Contact Data Tools</u> Lookup People Create Contact Universes Spreadsheet Data Entry Contact Statistics <u>Phone Canvassing</u> Create New Phone Banks Manage Phone Bank Links Manage Callers Phone Bank Statistics Phone Bank Count Reports Auto Dialing Predictive Dialer <u>Calendar</u> View Calendar Create a Work Shift Create an Event Assign People to a Work Shift Invite People to an Event Volunteer Lookup / Stats Volunteer Check In/Out Manage SMS Message	<u>Emails</u> Create a New Message Manage Email Deliveries Create Seed Lists Manage Auto Sends Email Settings <u>Web Forms</u> Create / Edit Forms Manage Transactions Transactions Stats Payment Setup <u>Admin</u> Account Data Configuration Account Settings Add/Edit User Accounts Billing Center Data Sharing Exports Export All Flags Export Polling Places Imports Contact Data Imports	<u>Admin continued</u> Import Flags Contact Phone/Email Import Precinct Import Manage Output file Manage Precincts Manage Universe & Static Lists Manage Sub Accounts
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For those of you who use the single sign in feature, you will need to click on the  icon in the Home Page header to move between your various accounts.

The body of the Home Page can have up to seven sections of what the program refers to as widgets. They include:

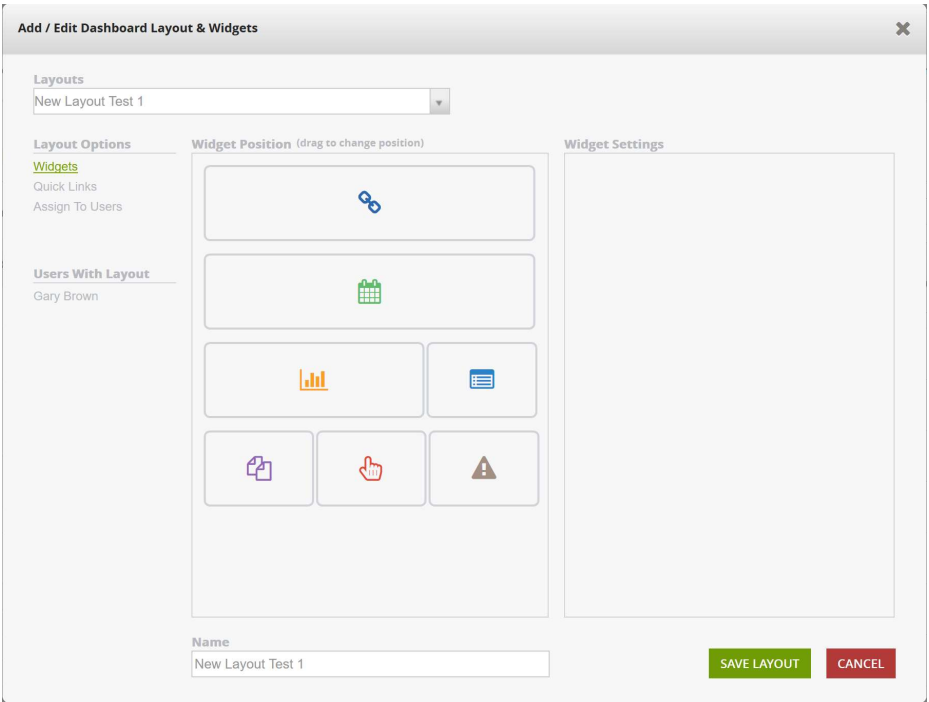
- 1) **My Quick Links** – This feature directs you to the six most commonly used pages in the program without using the menu. You can customize which links you want to display.
- 2) **Calendar** – The fully functional calendar can be used to view all of your calendar items such as work shifts, meetings, and events. You can also schedule new calendar items by clicking on the date & time as you would in programs like Outlook and Google Calendar. If you click on a specific item, you can view the list of people scheduled to work or attend the event. There several additional calendar features for you to explore.
- 3) **Daily Statistics** – This tool helps you track daily productivity of your canvassing program, volunteer recruitment, and fundraising.
- 4) **Support and Early Vote Statistics** – This feature is identical to the previous version Home Page.
- 5) **Voter File Updates** - This feature is identical to the previous version Home Page.
- 6) **Election Voting Updates** - This feature is identical to the previous version Home Page.
- 7) **PDI Message** – This feature allows PDI to notify users of program changes, help tips, training sessions, and other information that will help enhance your user experience.

The screenshot displays the 'Sample Campaign' Home Page for California State. The page features a navigation bar with links like 'Voter Data Tools', 'Contact Data Tools', 'Phone Canvassing', 'Calendar', 'Emails', 'Web Forms', 'Admin', and 'File Pickup'. The main content area is divided into several widget sections:

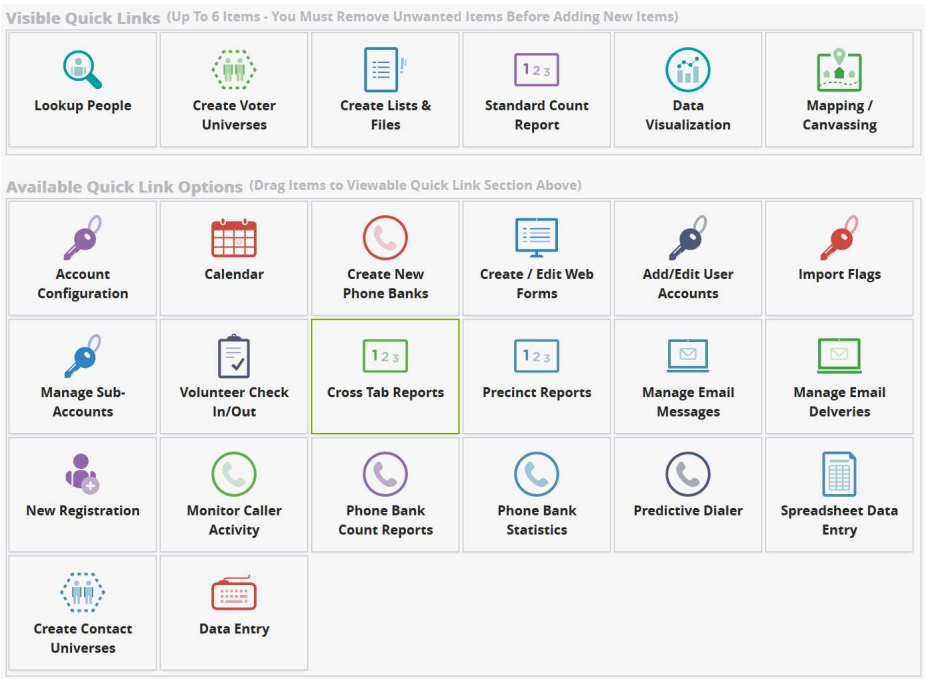
- My Quick Links**: A section with six icons for 'Lookup People', 'Create Voter Universes', 'Create Lists & Files', 'Standard Count Report', 'Data Visualization', and 'Mapping / Canvassing'.
- Events Calendar & Events List**: A calendar view for 'Sunday, August 20, 2017 - Saturday, August 26, 2017'. It includes a time slot grid from 8:00 AM to 8:00 PM.
- Daily Statistics**: A section with filters for 'Type of Counts' (Support), 'Candidate' (Jose Rodriguez), 'Method' (Method Type), and 'Date Range' (7 days). It includes a legend for SS, LS, U, LO, and SO, and a line graph.
- Support and Mail Statistics**: A table showing counts for 'Supporters', 'Undecided', 'Opposed', 'Mail Ballot Sent', and 'Mail Ballot Returned'.
- Voter Files Updates**: A table showing the last update date for various counties (Alameda, Alpine, Amador).
- Election Voting Updates**: A table showing the last update date for various counties (Alameda, Alpine, Amador).
- PDI Message**: A section titled 'Upcoming Election Updates' with a sub-header 'The complete 03/07/2017 and 04/04/2017 vote history'.

The best feature of the new Home Page is that it can be customized. You can specify the position of each widget, hide the widgets you don't need, and configure the ones you do need.

To customize the home page, click on the ⚙ gear icon in the upper right corner of the My Quick Links widget. This will bring up a new page for editing the home page dashboard. To reposition the section widgets, just drag them into the positions you desire. To configure a widget, click on the widget in the middle section and then configure the setting in the widget settings section to the right.



To make changes to the My Quick Links widget, click on Quick Links in the Layout Options section of the page on the left margin. You can then reposition the link icon as you wish. Keep in mind, you will need to drag an icon from the visible Links row to the lower section before adding new icons to the Visible Links row.



You can create multiple home page dashboards and assign them to different users in your organization. Click on the Assign to Users link on the left margin for a list of users in your account. Click on the Save Layout button when you are finished making changes to your Home page dashboard.

We removed the My Current District section that was on the previous version Home Page and replaced it with a 🗺️ continental US map icon to the right corner of the My Quick Links widget. The functionality is the same and the applied district will be displayed in the program header.

What's Changed – Create Voter Universes

We have made numerous changes to the Create Universes Pages, but the main concepts behind the process of creating universes has not changed.

We did some reorganizing of the tabs to provide adequate real estate for grouping, labeling, and selecting the various data options. The Create Universe tabs now include Vote History, Data Fields, Geography, My Flag Data, Early/ Mail Voting, Models, Saved Universes, and Custom Data.

Vote History	Data Fields	Geography	My Flag Data	Early / Mail Voting	Models	Saved Universes	Custom Data
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The Vote History tab no longer has the section for Saved Universes. The Saved Universes now has its own tab with more space to search and filter your previously saved universes.

The demographics tab is now called Data Fields because it includes more than just demographic fields. We combined this tab with the Extra Field tab options and expanded the tab vertically so you will need to scroll down to view all the field options.

The Mail Ballot tab is now called Early / Mail Voting to provide a more accurate label.

We have created a new tab dedicated to models with a histogram and sliders to specify model score ranges. The tab accommodates combining two models in the same criteria. Organizations can also display instructions for using proprietary models.

The Saved Universes tab has a lookup feature that makes it easier to select and view information about universes such as the creator and creation date.

Besides moving things around, we made some other significant changes and improvements. We changed the layout of a pending universe after you add one or more criteria.

((Criteria 1) OR (Criteria 2))

Criteria 1 (Include by Voter)

Cumulative Totals: Voters: 186,770 House: 137,960 Mailboxes: 140,222 Phones: 152,496

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Vote History	2	2016 General	V	2016 Primary	V	All Ballots	V
Contact Voters With	1	All Phones	V				
Party	3	Democrat	V	Republican	V	Declined to State	V
Ethnicity / Language	1	Latino	V				
Early / Mail Voting Options	1	PVBM	V				

OR

Criteria 2 (Include by Voter)

Cumulative Totals: Voters: 223,530 House: 163,112 Mailboxes: 166,190 Phones: 153,231

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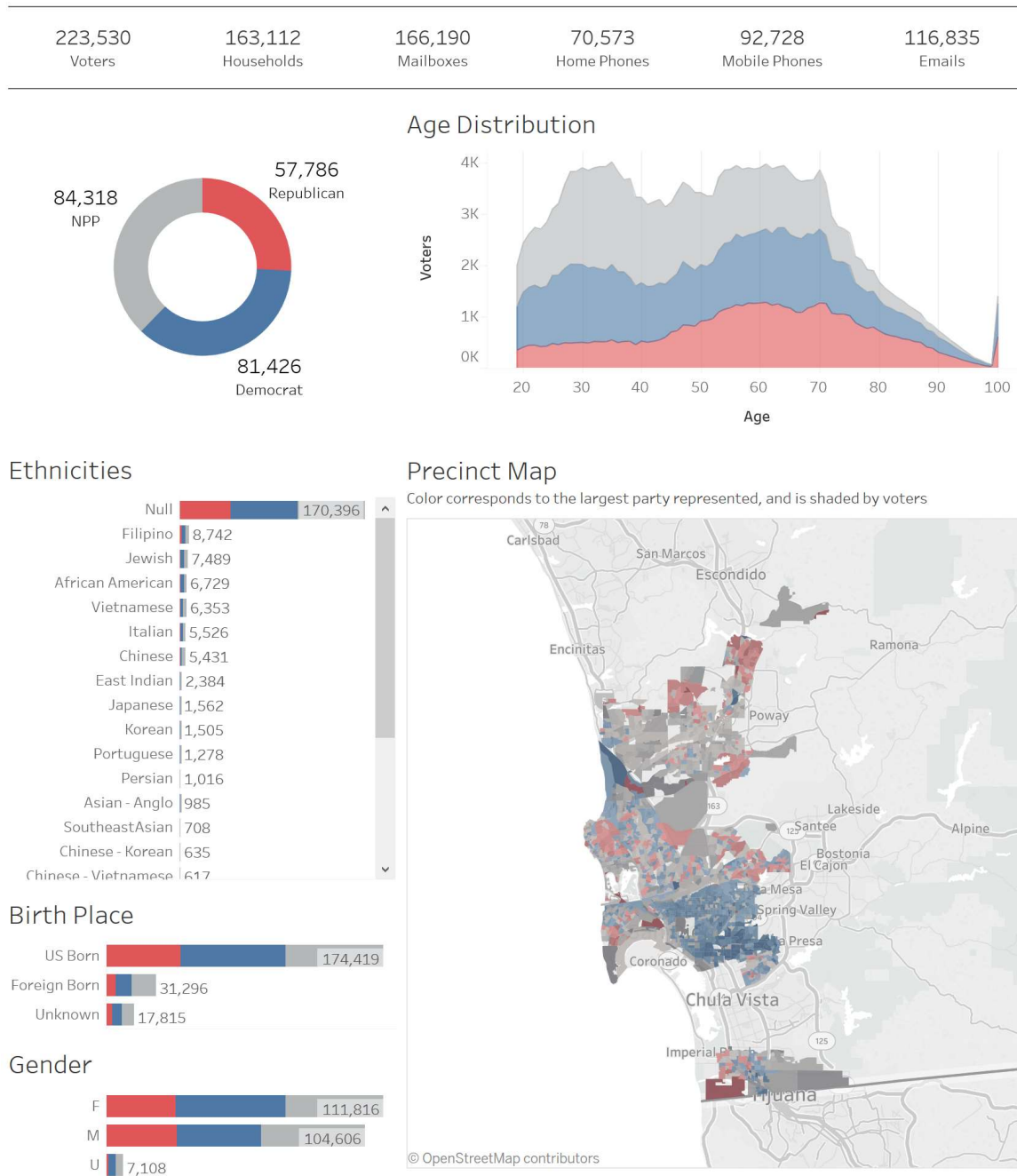
↓

✕

Party	1	Declined to State	V				
Ethnicity / Language	1	Latino	V				
Vote History	1	2016 General	V	All Ballots	V		
Early / Mail Voting Options	2	PVBM	V	Voted By Mail At Least 2 Times	V		

We now show counts for each step when more than one criteria is added. The last criteria show the cumulative count for the pending universe. If you make an error while adding your criteria, you can reposition the criteria and even change the logical operators. There is a Refresh Counts button to recalculate the pending universe.

To help ensure the accuracy and effectiveness of pending universes, we have added a new feature that takes your universe and builds a page of Tableau data visualizations. This is by far the coolest feature we added in this new version. When you click on the View Visualization button, the program will pull up your pending universe in Tableau. You can then click on any element within the visualizations to filter the universes further. There is a separate Data Visualization page for viewing saved universes.



The second coolest feature we added to the Create Universes page is the ability to modify saved universes. By clicking on a saved universe from the Saved Universe tab you will see the written description of that universe and a button to edit the universe. This will load the universe and make it possible to change the order of your criteria,

delete criteria, add new criteria, and change the logical operators used in the universe. You can then resave the universe. Keep in mind that if you are editing a universe that is nested within another universe, this may have unintentional consequences.

The third coolest new feature is the ability to retain your unfinished work when building universes. Every time you open the Create Universes page it will load the last universe you were building. Now, you can take that phone call or go to that meeting knowing that your work in progress will still be there when you go back to the Create Universes page.

What's Changed – Standard Count Reports

The changes to the Standard Counts Report page are simple, but make the tool much easier to use. At the top of the page we combined the report universe filter with the Add Rows/Columns process. We moved the count type and row configuration options to the right margin and made them permanently visible.

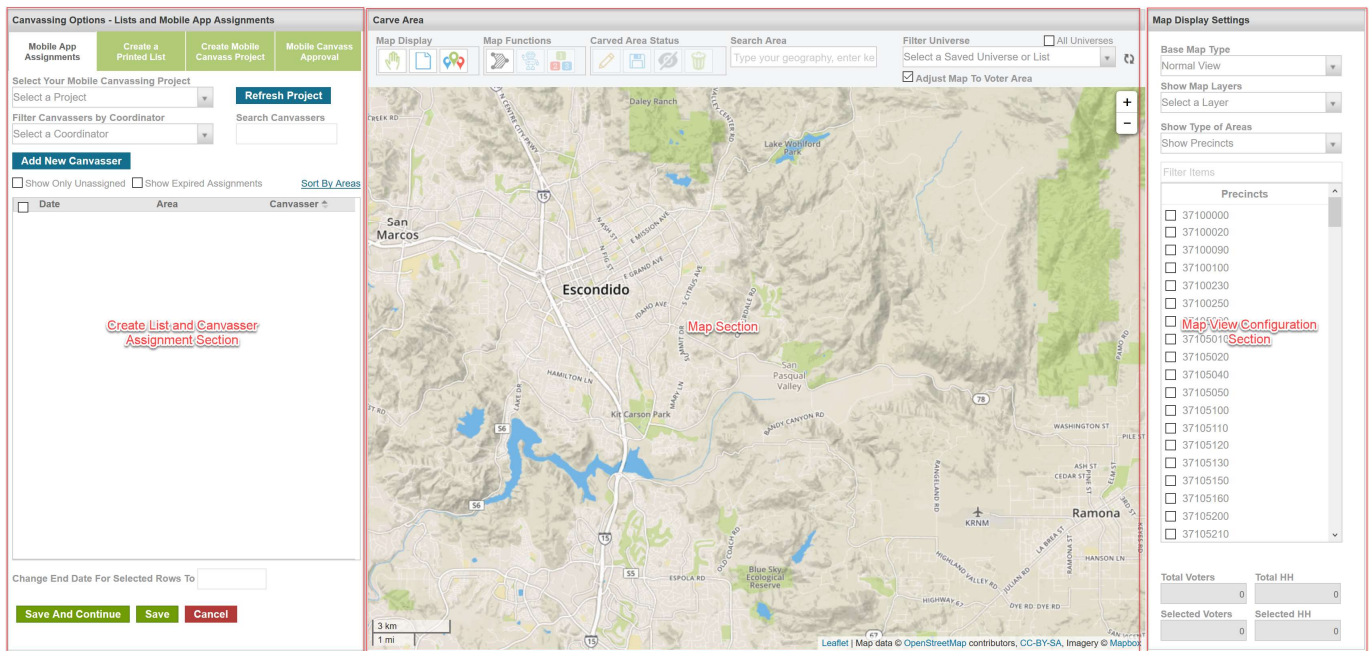
The screenshot displays the 'Standard Count Reports' interface. At the top, there's a section for 'Add a Report Filter, Row, Column' with a dropdown for 'Add Report Filter', a 'Field Type' dropdown, and an 'Add' button. Below this is a section for 'Add Geography +' with links for 'Current Geography Filter:' and 'Run a Saved Report +'. A 'Run Counts' button is prominent. To the right, a 'Count Type To Display' panel lists options: 'People' (checked), 'Houses', 'Mail Boxes', 'All Phones V', 'All Phones H', and '%'. Below this is an 'Add Rows' section with 'Demographic Options' and 'PDI Propensity Options' dropdowns, followed by a list of checkboxes for various geographic and demographic categories like 'Overlapping Counties', 'Overlapping CD, SD, AD', 'Overlapping Sups', 'Overlapping Cities', 'Overlapping Zip Codes', 'Overlapping Schools', 'Overlapping Precincts', and 'Overlapping Elec. Precincts'. The main area shows a 'Current Report Filter:' section with a table header 'Description' and 'Total'. The table has one row labeled 'Total' with a value of '1 options'.

When adding demographic rows to your count report layout, you can now create and save multiple custom groups of rows. You can create and edit the row groups by clicking on the [Demographic Options](#) link. For the long time PDI users, you may remember similar functionality in a previous version of the program about six years ago.

What's Changed – Mapping / Canvassing Page

The mapping module has changed and expanded. We worked very hard to make this map an invaluable tool for managing your canvassers. Our objective was to create a page that could handle the complete workflow process used by field organizers to create, manage, distribute, and validate canvasser data. This page is big and has a lot of functionality, but it will make life easier for those of you tasked with managing field canvassing programs.

The page has four sections. Three of the sections are permanently visible and include the map viewing options on the right margin, the map in the middle section, and the list / canvasser assignment section on the left margin. The fourth section for data quality control appears when opened from the Mobile Approval tab.



The main mapping section in the middle of the page has not changed very much. We just moved the configuration settings that were located within the map to the right margin. This allows us to provide more space for these options and they will be permanently viewable.

The left margin contains the functionality for creating lists and mobile app projects, distributing mobile app assignments, and validating the data coming back from the canvassers using the mobile app. There are four tabs in the section:

- 1) **Mobile App Assignment** – This section has not changed much except for the ability to add new canvassers from this page.
- 2) **Create a Printed List** – This section makes it easier to generate printed lists using the map to identify your desired geography.
- 3) **Create Mobile Canvass Projects** – This section lets you create new mobile canvassing projects. The biggest change to this feature is the option to add a second and third survey to your mobile projects. This means you can configure different surveys for up to three different universes in a single mobile canvassing project.
- 4) **Mobile Canvass Approval** – The section makes it easier to manage the approval process for data returning to the program from your canvassers in the field. You can quickly approve data or review the data in more detail before granting approval. If you want to review the transactional detail of your canvasser, you can click on the View Canvassing Detail page button for a look at statistics by canvasser and each voter contacted. This section will appear below the Canvassing Options and Map sections.

What's Changed – Volunteer Shifts and Events

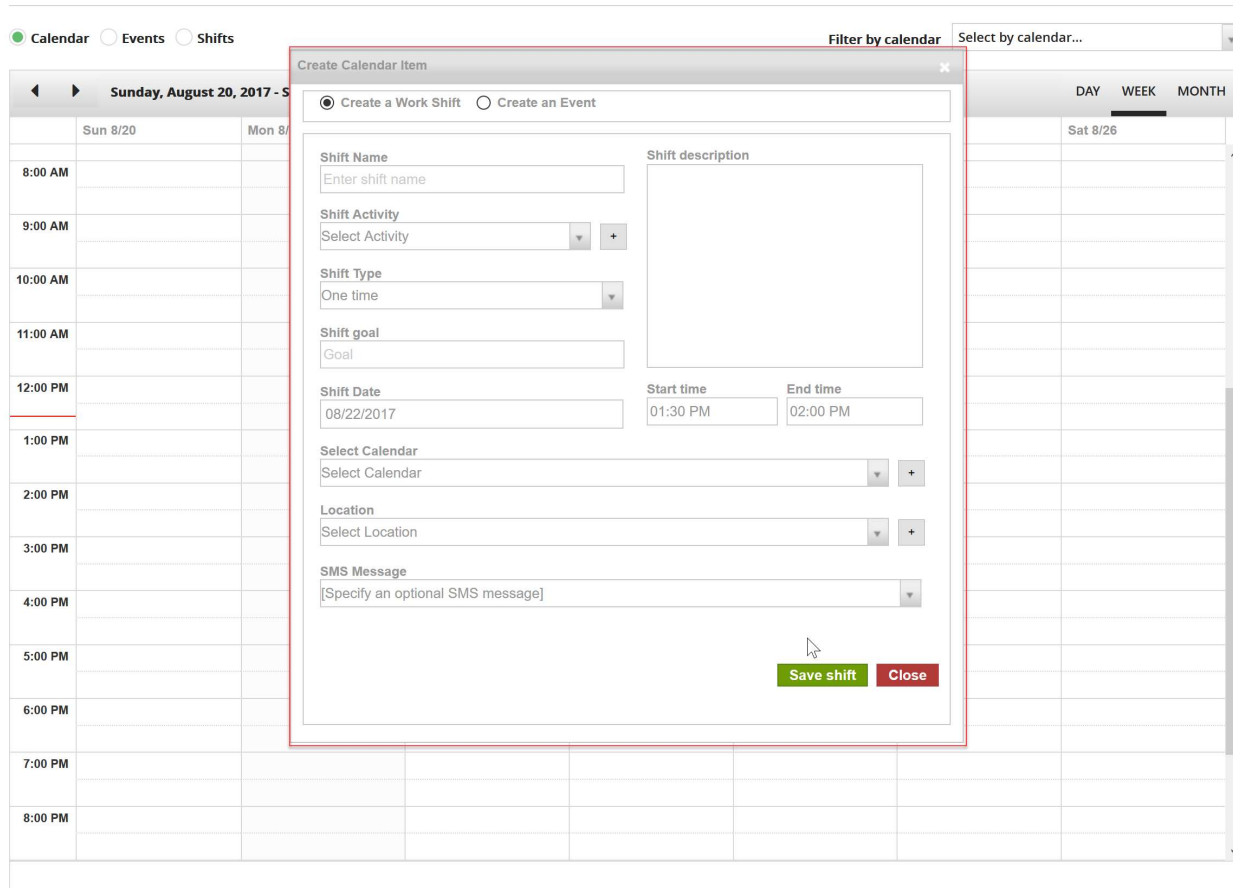
In the new version of the PDI software, we completely rebuilt and simplified the process for creating work shifts and events. We consolidated the functionality and created a Calendar Module. You can create calendar items such as meetings, appointments, events, as work shifts using the same process as you would in common calendar programs like Outlook or Google Calendar.

The Calendar is displayed on the program's Home Page and as a dedicated page from the calendar menu. The calendar has a daily, weekly, and monthly view setting. You can also display all of your work shifts or events in a list form.

To create a calendar item, click on calendar at the location of the date and time for your shift or event. A dialog box will appear for creating the calendar items. Once you save the item, you will be prompted to a page for assigning people to the shift or inviting people to your event. People can be contacted via text messaging or email from the PDI software.

Once you start scheduling calendar items, you will be able to view them on your calendar. You can then click on each item to view the people attending the shift or event. We even color code some items so you can instantly see the attendance status for the shift or event.

Events Calendar & Events List



Calendar Events Shifts

Filter by calendar Select by calendar...

Create Calendar Item

☒ Create a Work Shift ☐ Create an Event

Shift Name
Enter shift name

Shift Activity
Select Activity

Shift Type
One time

Shift goal
Goal

Shift Date
08/22/2017

Start time
01:30 PM

End time
02:00 PM

Select Calendar
Select Calendar

Location
Select Location

SMS Message
[Specify an optional SMS message]

Save shift Close

What's Changed – Account Configuration

The Administrative Pages in the previous version of the program are now located in the program's Admin Menu. We separated the account configuration items into two sub-menu items for Account Data Configuration and Account Settings. If the setting deals with data or flags, you will find it in the Account Data Configuration.

Account Data Configuration



Flags & Surveys Volunteers Events Donors Contact Datasets Custom Districts

Candidates / Issues ID Flags Survey Questions / Response Codes Printed Surveys Electronic Surveys Acquisition Types

If the setting deals with the behavior of the program, you will find the settings in the Account Settings.

Account Settings



General Settings Tab File Pickup Viewable Data Options Vote Reg

Two things to note.

- 1) The File Pickup page is located in the second tab.
- 2) The Organization Info page in the previous version of the program is now located on this page in the General Settings tab.

What's Changed – Email Module

The Email module now has a cleaner and more user-friendly designer interface, and new functionality for A/B testing and scheduling auto send emails.

A/B testing allows you to test multiple email variables and then automatically send the full email to the version with the better response.

The auto send feature lets you schedule daily or weekly emails based on time oriented universes related to the current date. For example, you can send emails based on flags or actions that occurred “yesterday” or will occur “tomorrow.” We added these date fields to several tabs in the create universe pages.

What's New – Data Visualization

As we mentioned in the Create Universes portion of this document, the new data visualization functionality in this program is very cool and fun to explore. You will find it very helpful for understanding and communicating complex data.

From the Voter Data Tools Menu, you can click on the Data Visualization option to open the visualization page. You can click on the Go button without selecting a saved universe for a visualization page showing all voters in your account geography. This page will have many selection boxes to filter your data.

Spend some time playing around with these pages. Click on the variables to change the page filters. You can view the geographies by legislative or precinct boundaries.

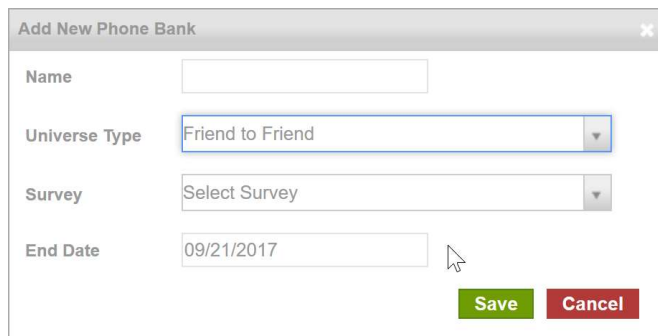
If you select a saved universe and then click on the Go button, the visualization page will only show individuals that qualified for your universe. There will be a second tab on this page that shows visualizations based on support related IDs.

Once you have your data visualization properly set, you can create PDF output files or share the page via embed codes. These options are located on the upper right portion of the visualization pages.

What's New – Friend to Friend Phone Banking

The PDI Connections Friend to Friend Phone Banking lets your volunteers or supporters create phone banks containing only their personal contacts who are registered to vote and live within your account geography.

Friend to Friend phone banks are created just like a normal phone bank. The only difference is that you would select “Friend to Friend” as the universe type instead of a saved universe.



The screenshot shows a dialog box titled "Add New Phone Bank". It has four input fields: "Name" (empty), "Universe Type" (a dropdown menu with "Friend to Friend" selected), "Survey" (a dropdown menu with "Select Survey" selected), and "End Date" (a date field with "09/21/2017" entered). At the bottom right, there are two buttons: "Save" (green) and "Cancel" (red).

Like the normal phone banks, you will need to create a link to distribute the phone bank to your callers. As callers click on the link, they will be able to create their own personal phone bank account. They can import their contact from sources such as Gmail, Yahoo, and iPhone iOS contacts. The data will automatically be match to the voter file and posted to a customized online phone bank. Only contacts that have been called and flagged will be sent to the organization database.

PDI Connections

PDI Connections App a secure and simple to use application that copies the contact information from your contact management program (such as Gmail and Yahoo) and creates an online list of your friends who are registered to vote in your district.

The Sample Campaign has created a survey with a script to help you with basic talking points and questions to ask your friends.

By enterint the answers in the app, the Sample Campaign will be able to identify your friend's responses but will not have access to the contact information you provided.

Only you will ever have access to your PDI Connection App account containing your personal contacts.

First Name *

First Name

Last Name *

Last Name

Email Address *

Email Address

Mobile Phone *

Mobile Phone

Zip Code *

Zip Code

Home Address (Optional)

Address

City

City

State

State

Enter a password to use for your personal PDI Connections Account

Enter password

Confirm password

☐ I Authorize the PDI Connections App to Import My Contacts

Import Contact From

Import From

[View Terms of Use / Privacy Policies](#)

* required fields

Save

Cancel

What's New – Mobile Canvassing Application

We have made some major improvements to our mobile canvassing app. We cleaned up the functionality that allows two canvassers working in the same precinct or carved area assignment to see each other's progress in real time. A mobile canvassing project can now handle up to three different surveys.

You will need to install the new version of the app before using with the upgraded PDI version 3.0.

What's New – User Permission Levels

As you can see, we have made some substantial changes to the PDI software application. We have rebuilt the permission settings in the program to reflect the new changes. You may need to recreate some of your permission profiles for user accounts with limited access. We apologize for any inconvenience this may cause.

We hope you take advantage of this exercise to clean out and deactivate any user accounts that should no longer be accessible.

The good news is that we redesign the page for building new permission profiles to simplify the process. Go to the Admin menu → Add/Edit User Accounts → Profile Management.