

# rVotes Phone Number Import Instructions

## From Excel Sheet

Version: 9/14/2011

First, prepare the “Excel” data sheet for import into rVotes.

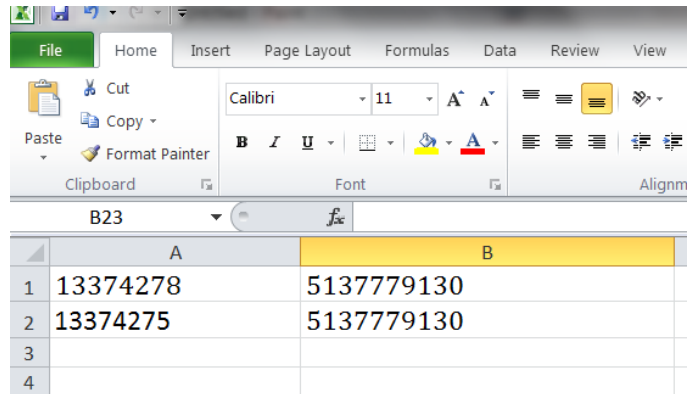
The columns should be as follows:

- Voter ID
- Phone Number (10 digits, no spaces)

For Voter ID, use either the:

- Secretary of State Voter ID (SOS ID) without the “OH”
  - Must have numbers only.
  - If copy and paste into Excel, Excel will automatically delete any starting zeros.
- rVotes ID (rVid ID)
  - Different from SOS ID

**Do not use the “Local Voter ID”,** which is typically specific to counties, since the same number could be in use in another locale / county.



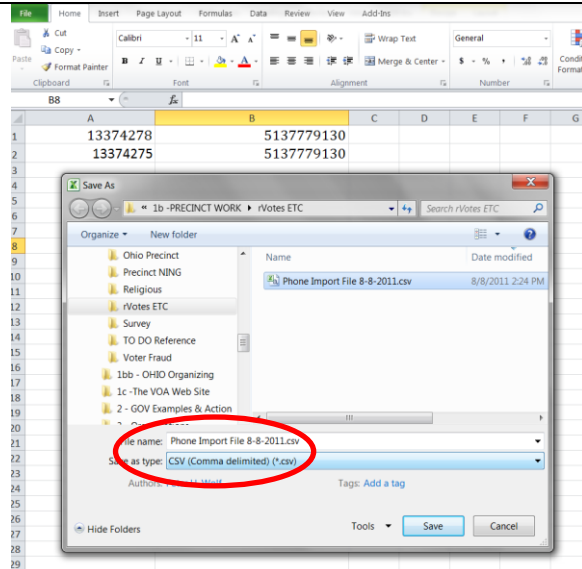
	A	B
1	13374278	5137779130
2	13374275	5137779130
3		
4		

**Prepare an rVotes import file** from the Excel document, by saving it as a “Comma Delimited File”.

Delete any header rows you might have in Excel prior to creating the “Comma Delimited File”.

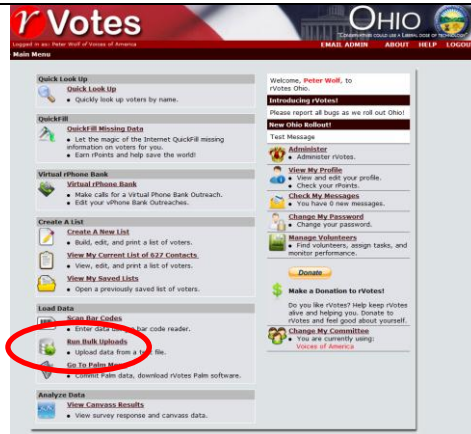
Do this in Excel from the “File” drop-down menu by selecting “Save As”. Then select “**Comma Delimited**” (CSV) from the “Save As Type” drop-down menu.

Note: Every voter record can have only two home phone numbers associated with it. If yet a third number is imported, one of the previous numbers will be overwritten.



To upload the “Comma Delimited File” into rVotes, log into rVotes and go to the “Main Menu”.

Under “Load Data”, select “**Run Bulk Uploads**”.



Under “Data Management”, select and click on “Upload New Phone Numbers”

**rVotes**  
Logged in as: Peter Wolf of Voices of America  
Main Menu - Bulk Upload Menu

**Bulk Upload**  
Which action do you want to perform for these voters?

**Canvass Related**  
**Process An Activist Code Upload**  
Allows you choose a batch to process from all unprocessed uploads.  
**Add a Survey Response**  
Allows you choose a survey question and add a survey response to every voter whose Voter ID is in your text file.  
**Process A Survey Response Upload**  
Allows you choose a batch to process from all unprocessed uploads.  
**Upload Canvass Result Codes**  
Allows you to assign a canvass result code to voters whose Voter IDs are in your text file.

**Data Management**  
**Upload New Phone Numbers**  
Allows you to upload a new phone number for every voter whose Voter ID and new Phone Number is in your text file.  
**Upload New Email Addresses**  
Allows you to upload a new email address for every voter whose Voter ID and new Email Address is in your text file.

**General**  
**Upload into a Saved List**  
Creates a saved list with all voters whose Voter ID is in your text file.  
**Suppression**  
**Mark them as Bad Phone**  
Applies a Bad Phone code to every voter whose Voter ID is in your text file.  
**Mark them as Deceased**  
Applies a Deceased code to every voter whose Voter ID is in your text file.  
**Mark them as Moved/Undeliverable**  
Marks as Moved/Undeliverable every voter whose Voter ID is in your text file.

From the “Bulk Upload – Add New Phone” screen, click on “Choose File” button and select the previously saved “Comma Delimited File” from your hard drive.

Then click “Next”

**rVotes**  
Logged in as: Peter Wolf of Voices of America  
Main Menu - Bulk Upload Menu - Bulk Upload

**Bulk Upload - Add New Phone**  
Step 1 of 3

This process enables you to Add New Phone to a group of voters from a text-delimited data file.

**Each file line should contain:**  
gid, 10 digit Phone Number  
(i.e: 12, 5151234567)

For a successful upload, please make sure your data file meets the following conditions:

- It should be a plain text file with one record on each row.
- It should be either comma or Tab delimited.
- The file should contain no headers or other information above the first row of data.
- The first column must be the numeric Voter ID you wish to affect.

**Please select your text file:**

Choose File | Phone Import--8-2011.csv

Back Next

“Step 2 of 3” confirms that everything is in order prior to completing the process.

Please read all the information on this screen to confirm all, prior to clicking on “Next” to complete the process.

**rVotes**  
Logged in as: Peter Wolf of Voices of America  
Main Menu - Bulk Upload Menu - Bulk Upload

**Bulk Upload - Add New Phone**  
Step 2 of 3

**Importing and verifying your uploaded text file...**

File **Phone Import File 8-8-2011.csv** Uploaded.

Of your 2 file rows, 2 contain distinct and valid Voter IDs.  
**Click next to confirm and complete this process.**

Next

This screen confirms a successful import of your phone data.

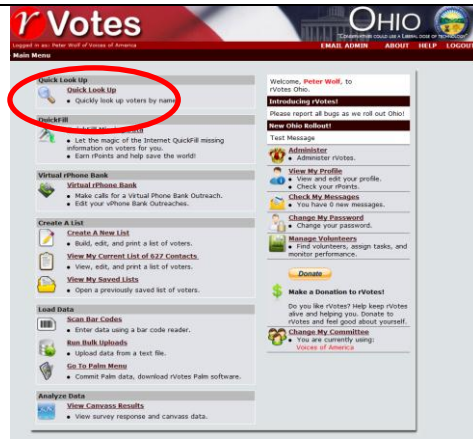
**Congratulations!**

**rVotes**  
Logged in as: Peter Wolf of Voices of America  
Main Menu - Bulk Upload Menu - Bulk Upload

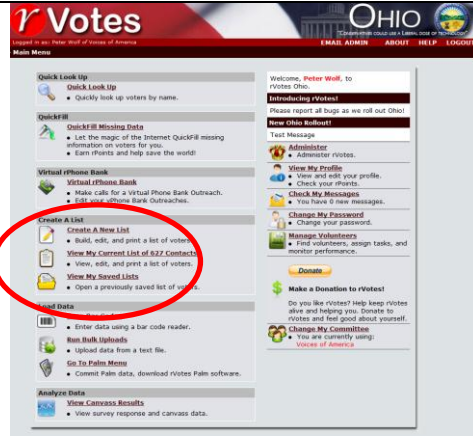
**Bulk Upload - Add New Phone**  
Step 3 of 3

Congratulations! You have finished the Upload process.  
**2 records processed of 2 file rows.**  
[Click here](#) to return to the bulk upload menu.

You can confirm a proper import by clicking on “Quick Look Up” and checking one of the affected voters.



You can also check which voters still have missing phone numbers by viewing a voter list for your precinct, either by creating a new one or by selecting one of the saved lists.



Once you select a list, it will show all voters in your precinct, including their phone numbers or with blanks if none is available.

You can click on any of the voters listed who have no phone number and individually enter a phone number for them.

