Introduction To Bluebird

Senate Technology Services
Helpline: 518-455-2011

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General Information

What is Bluebird?

Bluebird is a database used to track communication with constituents and/or organizations within a Senator's district.

- You can record **general information** (i.e. phone number, address, birth date)
- You can **Tag** Records with topics of interest through Issue Codes, Keywords, or Positions
- You can keep track of your casework through **Cases and Activities**
- You can add **attachments** to the system to keep track of communication between your office and constituents
- You can produce **mass mailings** in either paper or electronic format

Permissions and Roles within Bluebird

Within Bluebird there are several roles that office staff can be assigned:

- **Volunteer:** Ability to add records.
- **Data Entry:** Same permission as Volunteer plus ability to edit records and activities.
- **Office Staff:** Same permissions as Data Entry plus ability to Create, Edit, and Delete Records, Cases, Activities, Notes, Groups, Reports, and Relationships. Also has the ability to add Keywords.
- **Office Manager:** Same permissions as the Office Staff role.
- **Office Administrator**: Same permissions as Office Manager plus ability to set permissions for the staff in the Senator's office, merge contacts, and manage Tags. Office Administrators are also the only role that can delete records permanently.

> **Note**: The Office Administrator role **requires a memo or email** from the Senator or Chief of Staff stating that a particular employee will need to have Office Administrator access to Bluebird. The memo or email should be sent to the office's OSR at STS so this request can be processed.

Accessing Bluebird

Account Information

Before you receive access to Bluebird, you must:

- Attend a class held by STS training staff.
- Have a Senate email account. If you do not know this information, call the Help Line at ext. 2011.
- Establish your identity within Bluebird. See section titled **Establishing Your Bluebird Record - Required.**
- Have your Office Administrator for Bluebird assign you a role within the system.

Logging On

Bluebird is a web-based program hosted on the Senate Network. It can only be accessed from a Senate PC using your preferred web browser.

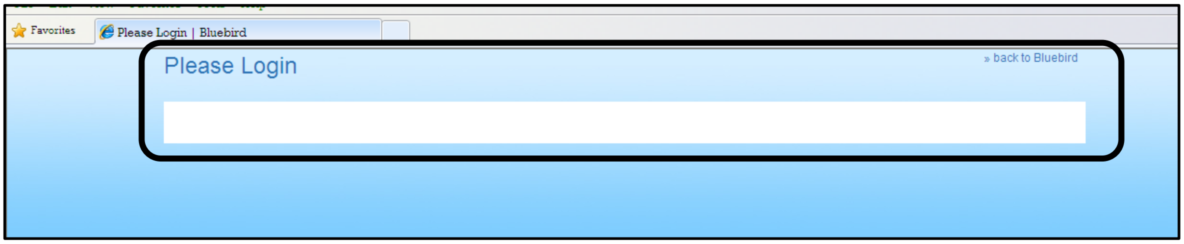
- Open your preferred internet browser.
- Go to **http://senateonline.nysenate.gov.**
- Click the **Login link**. Enter your Senate **username** and Senate **password**. If you do not know this information, call the Help Line at ext. 2011.
- On the navigation bar, click the **Bluebird link**. You will only see this when you are signed into Senateonline.
- The Bluebird splash page will appear. Click your **Senator's link** to access his/her Bluebird page.
- Enter your Senate **username** and Senate **password**.
- Click **Log in** to access Bluebird.

> **Note**: A quick way to access your Senator's Bluebird instance is to open a web browser and type in the following address: http://LastNameOfSenator.crm.nysenate.gov.

Establishing Your Bluebird Record - Required

In order to begin using Bluebird you must first complete the following:

- **Log in** to Bluebird. You will see the following message: Please Login, with a blank blue screen.



- Close screen and inform your Office Administrator that you have completed this step so they can assign you a role within Bluebird. After they have assigned you a role, you can log back into Bluebird and you should see the Dashboard.

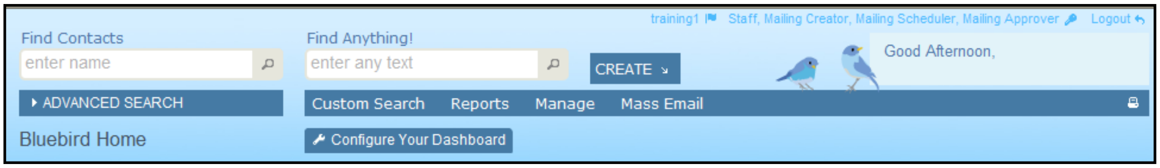
Personalizing Your Bluebird Record

Your Bluebird record contains your senate email address, which is used as an identifier when working within the database.

If you want to be identified as, something other than your email address edit your record and enter desired name information. A minimum of three characters for first or last name is required.

Main Navigation Area

Located at the top of the Bluebird window and helps you navigate through the system.



Logout Link: Remember to logout of Bluebird when you are finished with your work. To log out, click the **Logout link** in the upper right hand corner of the screen.

Bluebird Role: Your roles will display in the upper right hand corner of the screen.

Create Menu: Used to create new records, activities, and/or cases.

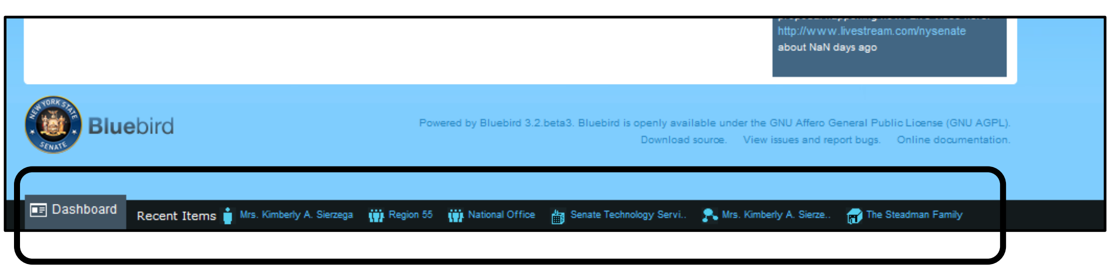
Reports Menu: Lists available preset Report summaries that can be used to access information in the database (i.e. Activity Reports). You can see a list of all Reports in the database by selecting **Reports Listing**. To create a report and make it specific to what you are looking for (i.e. only activities assigned to me) click on **Create Reports from Templates**.

Manage Menu: Available to every role except the Volunteer role, however what you see in this menu is based on the role you have. Some roles will see more options than others will. The Office Administrator role will manage tags and user roles from this menu.

Search Options: Bluebird offers many search options: Find Contacts, Advanced Search, Find Anything, and Custom Search.

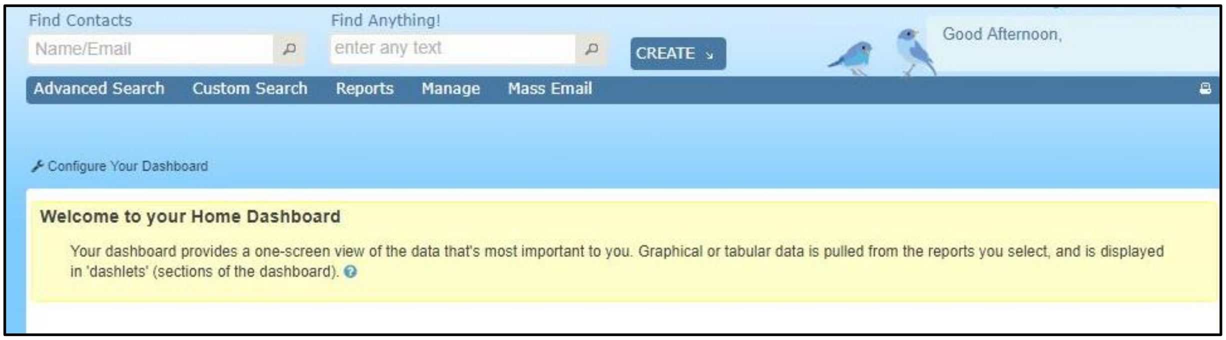
Message Popup Box: Appears when something is added, updated, saved, or removed. The box will disappear automatically or you can click on the X in the top right corner of the box to close it.

Recent Items Area: Located at the bottom of the page this area tracks recent activity. To return to an item that you were working with click the icon from this area.



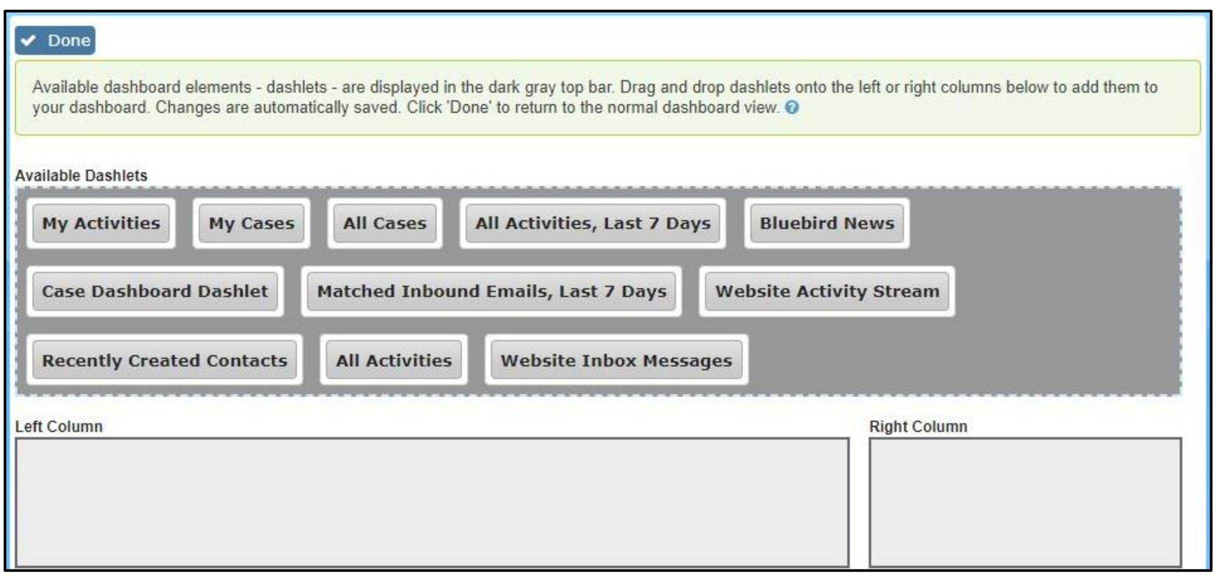
The Dashboard

The dashboard includes several dashlets made from various Reports within Bluebird. The dashboard is customized per user by choosing which dashlets to display. You also have the ability to make any report a dashlet; see section titled **How to Create a Dashlet** for more information.



Configuring the Dashboard

1. Click the **Configure Your Dashboard** button.
2. Drag the **desired dashlet** into either the left or right column areas.
3. To remove an item from a column, click and drag it back to the top.
4. When finished customizing, click **Done**.



Default Dashlets

Below is a list of default dashlets available in every Bluebird instance:

- **All Cases**: Displays Cases with scheduled activities
- **My Cases**: Displays Cases you have opened that have scheduled activities
- **All Activities**: Displays scheduled Activities created by any staff member
- **All Activities, Last 7 Days:** Displays any Activities created in the past 7 days
- **My Activities:** Displays any Activities that are scheduled that you have created
- **Matched Inbound Emails, Last 7 Days**: This option works with Inbound Email
- **Bluebird News:** RSS feed updated by STS staff
- **Website Activity Stream:** Displays activity from the Senator's nysenate.gov site
- **Website Inbox Messages:** Displays messages constituents submit to the Senator via the nysenate.gov website

Creating a Dashlet

You can only create a dashlet from a Report. Follow the steps below to create a dashlet:

1. Click **Reports Menu** then click **Create Reports from Templates.**
2. Select the appropriate **report**. Fill in **desired columns and filters** by clicking on the **Columns** and/or **Filters** buttons at the top of the screen. To adjust the way the Report results are sorted, click the **Sorting** button.
3. Click **Preview Report** or **View Results** button below these options to run the report**.**
4. Once the report runs you will now see **Title and Format**, **Email Delivery**, and **Access** buttons appear along the top of the screen.
5. To create a dashlet, click the **Title and Format** button to **name** the report. Add a **description** of the report if desired.
6. Click on the **Access** button.
7. Click **check box** next to Available for Dashboard? When this box is checked two additional options will be available to you.
    a. **Limit Dashboard Results:** The default number of rows per page for most reports is 50. However, this may be too many for a report which is included in the 'Home Dashboard'. You can reduce the number of rows included in each page when the report is part of the Dashboard by entering the desired row count here.
    b. **Cache dashlet for:** How often should the contents of this dashlet be automatically refreshed? Users can manually reload by clicking the refresh button on their dashboards.
8. Click **Create Report** button. A message popup box should appear saying the report has been created successfully.
9. Go to the Dashboard and click on **Configure Your Dashboard**.
10. Click and drag the desired **dashlet** into the desired column then click **Done**.

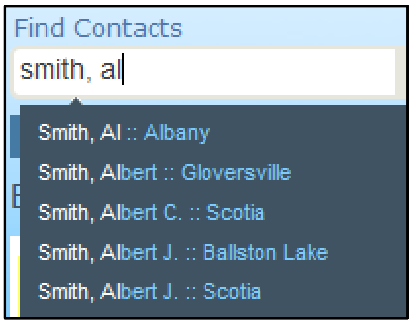
Returning to the Dashboard

You can return to the Dashboard at any time by clicking the **Dashboard button** in the bottom left corner of the screen.

Find Contacts

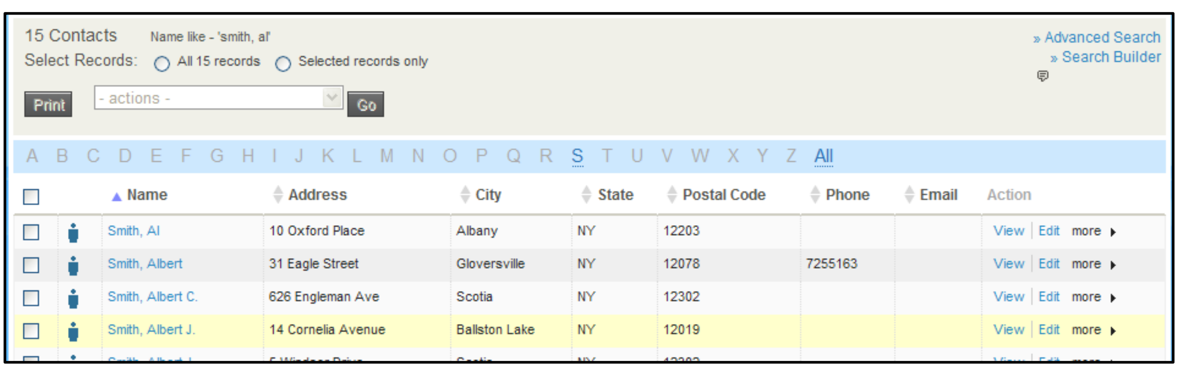
Find Contacts is best used for locating a single contact by their last name.

- Click the **Find Contacts** box and begin typing **the last name** of the contact you are looking for (this field is not case sensitive). A list of possible matches will appear as you begin typing a minimum of three characters.
- If the contact name you are looking for appears in the list, you can **click on it** to open the contact record or you can press **Enter** to display a detailed search results screen.



Tip: You can narrow down your search by including all or some characters of the first name in the search box. Type the **last name**, type a **comma**, press the **space bar** and then type **all or some** characters of the **first name**. For example, if you are looking for Albert Smith you would type **smith, al**.

- From the detail search result screen click one of the following links to access a record:
  - **Hyperlinked name** or **View:** takes you to the contact record.
  - **Edit**: takes you to the contact record's edit screen.
  - **Contact icon**: shows basic details about the contact through a popup screen.



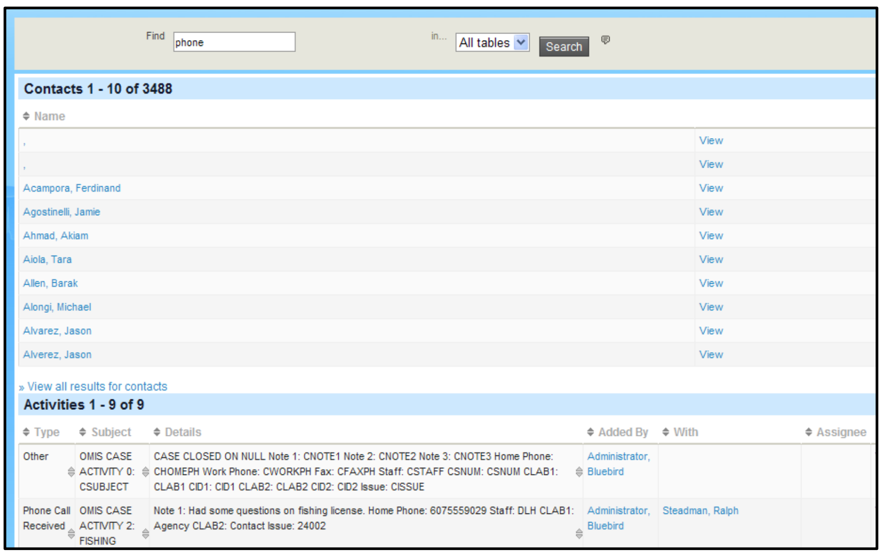
Find Anything

Find Anything is best used for searching attachments associated with contact records, activities, or cases. Bluebird will only search for the name of an attachment, not text within the attachment. You may search for specific file types (i.e. .jpg).

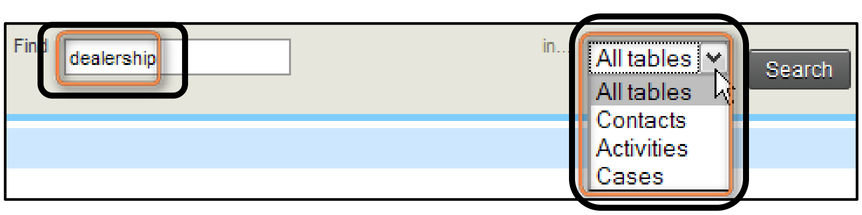
Attachments

- Click the **Find Anything** box and type the **desired attachment name** or **the file extension**. This is not an auto-complete field; you must type in all of the desired text.

- Press **Enter** to conduct the search and display the results list.



- After conducting a search, you can narrow down the results by selecting a specific record type (Contacts, Activities or Cases)



- To view the attachment, click on the paperclip icon and the attachment will download onto your computer.

Advanced Search

General Information

Advanced Search is used to search for virtually any information available in the database. By default, Advanced Search will retain the search criteria after you run a search.

- Clicking the **Advanced Search button** expands the search interface, where you will notice the search options are sorted by panels.

- When you select an option from any of the dropdown choices, it will appear below the dropdown in a running list. Click **x** to remove it as a selection or choose more options from the dropdown to build on your search criteria.

- Several text fields will let you set multiple criteria by entering the values separated by a comma (i.e. zip code search – 12303, 12306, and 12309).

- You may use the percent symbol (**%**) as a **wildcard** for free form text fields. The wildcard may be used before, after, or in the middle, of search text.

- When conducting an advanced search, the default **Display Results As** drop down is set to Contacts, however, you can adjust this to search for other criteria. This provides additional search options than the Find Activities or Find Cases search screens under Custom Search.

- To clear the criteria, click the **Reset Form** button on the screen. This will reload the form with all previous criteria removed.

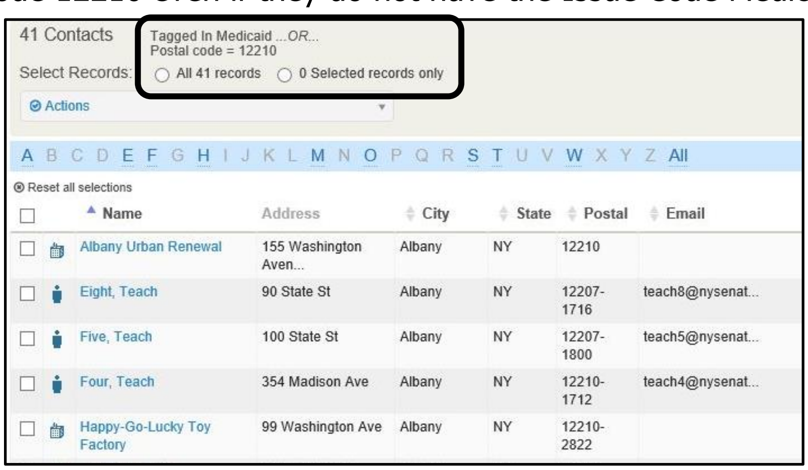
- **Search Operator field** allows you to be more or less restrictive with your searches.

For *more restrictive searches*, use the **AND** operator, see example below.

By selecting **AND** under Search Operator**, Medicaid** under Issue Code(s), and typing **12210** in the Postal Code field the result will show all contacts with the Issue Code Medicaid who live in Zip Code 12210.

For *less restrictive searches*, use the **OR** operator, see example below.

By selecting **OR** under Search Operator, **Medicaid** under Issue Code(s), and typing **12210** in the Zip Code field the result will show contact with the issue code Aging no matter what zip code they live in plus anyone who lives in Zip Code 12210 even if they do not have the Issue Code Medicaid.



Conducting an Advanced Search

1. Click **Advanced Search**.

2. Fill out **desired criteria**.

3. Click the **Search** button to display the search results list.

4. Click on one of the following links to access a record:

    Hyperlinked name or **View**: takes you to the contact record.

    Edit: takes you to the contact record's edit screen.

5. **Contact icon**: shows basic details about the contact through a popup screen.

6. Perform one of the following steps:

    - If the number of records is **incorrect**: Click on the grey **Edit Search Criteria** panel at the top of the search results screen, **edit search criteria**, and click on **Search**. This should adjust your results. If you are still having trouble, try clicking on the **Dashboard** button to refresh your screen. Then click **Advanced Search** and run your search again.

    OR

    - If the number of records is, **correct**: You can perform any of the options listed in the actions drop down menu after selecting the desired records.

Note: When viewing a search result, you are seeing ALL names listed in alphabetical order. If you click a different letter from the Search result listing, you have just changed the filter of your search result. To view the entire list again, click on the All link.

Searching for Deleted Contact Records in Trash

You may search through the Trash to view contact records that have been deleted but not permanently removed from the system. The Office Administrator has the ability to permanently delete a contact record.

1. Click **Advanced Search**.
2. Under the Search Settings panel click the **check box,** titled **Search in Trash** (deleted contacts).
3. Fill out any **additional fields** you would like to search on (i.e. last name of contact)
4. Click the **Search** button to display the search results list.
5. Under the **actions** drop down menu at the top of the screen select **Restore contacts from trash**.

Note: other fields can be included in a Trash search (i.e. last name).

Custom Search Menu

Find Cases

This search allows you to find any Cases by using the following search options:

- Constituent Name or Email
- Case Start/End Dates
- Case Type
- Status
- Case Keywords

Find Activities

This search allows you to find any Activities by using the following search options:

- Name or Email of the Contact (With), Employee Assigned to (Assigned To), or Employee who added the Activity (Added By)
- Type
- Dates
- If the Activity had a Follow-up Activity
- Subject
- Status
- Details
- Priority
- Keywords
- Place of Inquiry
- Activity Category
- Website Survey Name

Find Anything Search

This is a link into the Find Anything search screen, for more information see section titled **Find Anything** within this manual.

Proximity Search

This search is helpful to find records residing in the same postal code. You can search for records within a radius of a specific address or for Tags and Groups within a certain postal code or city. Follow the steps below to perform a Proximity Search.

1. Click **Custom Search** menu, then click **Proximity Search**.
2. Fill in **desired information**. For the best results fill in the Street Address field. If using only the Postal Code field the search will be based off of the middle of the postal code.
3. Click the **Search** button.

Birthday Search

This search allows you to find records that share the same birthday, birth year, or age. You can also search for records within a certain birth month. Follow the steps below to perform a Birthday Search.

1. Click **Custom Search** menu, then click **Birthday Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Include/Exclude Search

This search allows you to include or exclude certain groups from your results. A common reason for this type of search is if you want to do a district wide constituent postal mailing but would like to exclude all of the members of the press that you may have added to your Bluebird database. If you have previously labeled these contact records with the Press & Media Contacts Individual Category and then created a Group based off this selection, you will be able to exclude them from the mailing by performing the following steps:

1. Click **Custom Search** menu, then click **Include/Exclude Search**.
2. From the Include/Exclude fields, select the **desired Group/Tag**. If you need to remove an option, click the X next to the selected Group or Tag.

Note: This type of search uses the **AND** logic by default, uncheck the check box if you want to make it an **OR** search.

3. Click the **Search** button.

Tag/Group Changelog Search

This search allows you to find any Tag or Group that was Added or Removed/Disabled to a record on a certain date. You can also narrow this down by who altered the record.

1. Click **Custom Search** menu, then click **Tag/Group Changelog Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Tag Count Search

Use this search to generate counts for Tags based on date ranges for when the contacts were tagged. *Note: the only choice on the results screen of this search is to Export to CSV.*

1. Click **Custom Search** menu, then click **Tag Count Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Web Activity Search

You can search contact website activity records from the nysenate.gov website. You can search contact name, date range, and type of website activity.

1. Click **Custom Search** menu, then click **Web Activity Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Tag Demographic Search

You can search a Tag based on a demographic, like age. *Note: the only choice on the results screen of this search is to Export to CSV.*

1. Click **Custom Search** menu, then click **Tag Demographic Search**.
2. Fill in **desired information**.
3. Click the **Search** button.

Search Results – Actions Menu

After performing most searches, Bluebird will provide an actions drop down menu with the available options you can do with the results. Based on what you are searching on or for the actions menu may be limited.

1. Search the database to find the **desired common records**.
2. In the search result window, click **All** or **Selected records only**. If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.

Note: if you click the check box at the top of the list, it only selects the records on that page, not all records.

3. After selecting the desired records, click **actions** and then click the **desired option**.

Email – send now (to 50 or less) Actions Option

The **Email – send now** option listed in the actions drop down menu of most search results is used to generate an email from the system. This is different from the activity types **Email (outgoing), Email (incoming),** or **Inbound Email**, which may be used to record communication that took place outside of the system through IBM Notes.

This activity is limited to only 50 constituents at a time and is intended to be a personal form of communication. If you are interested in finding out how to send Bluebird Mass Emails (which has no limitation of recipients) please contact the STS Helpline at extension 2011 to set up a Bluebird Mass Email training.

Understanding Contact Records

What are Contact Records?

A Contact Record in Bluebird consists of various fields such as First Name, Last Name, mailing address, etc. A contact record may have multiple Activities, Cases, Notes, or Relationships attached to it. When you view the Contact Record, you are able to quickly see related information that provides details and history.

Types of Contact Records

There are three types of contact records in Bluebird:

- **Individuals**: Individual contact records are intended for constituents; however, you can add a person that is not a constituent. For example, you may want to enter in a school principal who may not live in your district, or a reporter at a local television station. A person icon indicates this contact record type.
- **Organizations**: Organization contact records are for a non-person, such as businesses, community groups, government bodies, or any other type of entity within your district. Once an organization record is created, you can create relationships between the organization record and an individual record to create an employer/employee relationship. You can have one organization record with multiple individual records related to it. An office-building icon indicates this contact record type.
- **Households**: Household contact records allow you to group people who live at the same address together under one Household to help eliminate paper waste when sending postal mailings. A house icon indicates this contact record type.

Working with Individual Records

Adding a New Individual Record

1. First, search the database to make sure the person does not already exist.
2. From the main navigation area, click **Create**, and then click **New Individual**.
3. Fill in **desired fields** then click **Save**. If you have more than one record to add, you can click the **Save and New** button. This will add the current record and bring up a blank record screen where you can add another individual record.

Parts of a New Individual Record Screen

- **Contact Details**: General Information about the individual. An individual can have multiple addresses, phone numbers, and email addresses.
    - **Prefix Field**: To ensure that letters are addressed correctly be sure that the Prefix field is filled in. If you do not know the prefix, make sure to adjust the Postal Greeting and Addressee fields within the Communication Preferences of the record. Custom options are available.
    - **Free form text boxes**: The name fields can be typed in however you would like, so make sure punctuation and capitalization is correct. How it looks in these boxes is how it will look on a piece of mailing for this record.
    - **District Info:** Based off the mailing address, these fields will auto populate with district information.
    - **Communication Details:** Email address, mass email settings, phone number, website address, employment information.
    - **Primary flags**: Provides a way for you to identify the preferred phone number, email address, or mailing address when there are multiple options to choose.
- **Additional Constituent Information:** Additional information such as, are they interested in volunteering, are they an active constituent, friend of the Senator, etc.
- **File Attachments:** You can attach up to five documents to each contact record. There is a limit of 2MB per item. You can only load image files, PDFs, Microsoft Office documents, and .CSV as attachments. *Please note that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.*

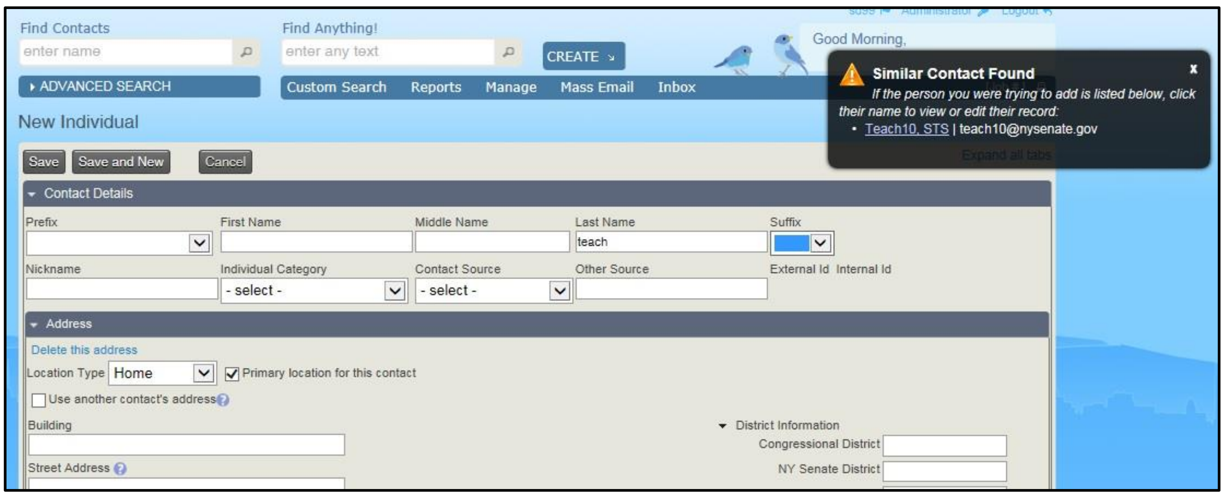
- **Communication Preferences:** Using the Communication Preferences panel you may select whether the individual does/does not wish to be contacted in a specific manner. When mailing, emailing, or creating merge letters, you can decide how you want to address a contact using the email, postal, and addressee fields.
  - **Email Greeting**: Salutation for sending emails (i.e. your email greeting may be more informal, such as *Dear Joe*)
  - **Postal Greeting**: Salutation for sending letters (i.e. your postal greeting may be slightly more formal, such as *Dear Mr. Smith*)
  - **Addressee**: First line of the mailing address, which could be present on mailing labels, envelopes, or the address block in letters (i.e. *Mr. Joe Smith*)
  - **Privacy Options:** Use this area to check off options if an individual asks to **not** be contacted in a specific manner
  - **Privacy Options Note:** Use this box to add a note as to why you selected a specific privacy option (i.e. Person called office asking to no longer receive postal mailings but still wants to hear from the office by email or phone)
  - **Preferred Methods:** Use this area to check off options if an individual asks to be contacted in a specific manner
  - **Preferred Language:** Use this option to select a language if an individual's primary language is something other than English. *Please note: this does not change the language of Bluebird or forms of communication that you send. It is only for office use so you can better communicate with your constituents.*
- **Notes:** As you work with individuals, you will begin to learn miscellaneous information about them, which can be tracked in the Notes area. The notes area is best used for general details such as details about their family, pets, or resumes.
- **Demographics:** This section contains gender options, ethnicity options, religion text field, and date of birth field and a check box to select if the individual is deceased. **Note: If you select the "is deceased" option, all of the Privacy "Do Not" options will automatically be selected.**
- **Tags**: Tags are a classification system, divided into three tools:
  - **Issue codes:** are a hierarchal tree to classify the individual's interests and areas of concern
  - **Positions:** legislative bills the individual has expressed an interest in
  - **Keywords:** are a list of words and phrases created by the office
- **Groups**: Groups are used to organize records. There are Smart Groups and Static Groups. For more information, see the section titled **Groups**.

Similar Contacts Found Pop-up Box

If you are adding a new record to the system and there are, similar records in the database a pop-up box will appear with similar contacts found. This search is based off the LAST NAME field and the FIRST NAME field. As soon as you tab off the LAST NAME field the box will auto-generate. If there are no contacts in your database that match the LAST NAME that you entered, then you will not see the box and can continue adding the record.

The auto-generated pop-up box of possible matched contacts will display up to 15 records and are listed alphabetically by first name. You can also see the phone number of the contact followed by the street address and city.

You may select one of the records shown (the names are linked directly to the record) or you can continue filling out the new record form. The pop-up box can be closed out by clicking on the X in the corner or it will go away on its own if nothing is selected.



Editing an Individual Record via the Edit button

1. Search the database to find the desired **Contact record**.

2. While viewing the contact record, click the **Edit** button next to Actions.

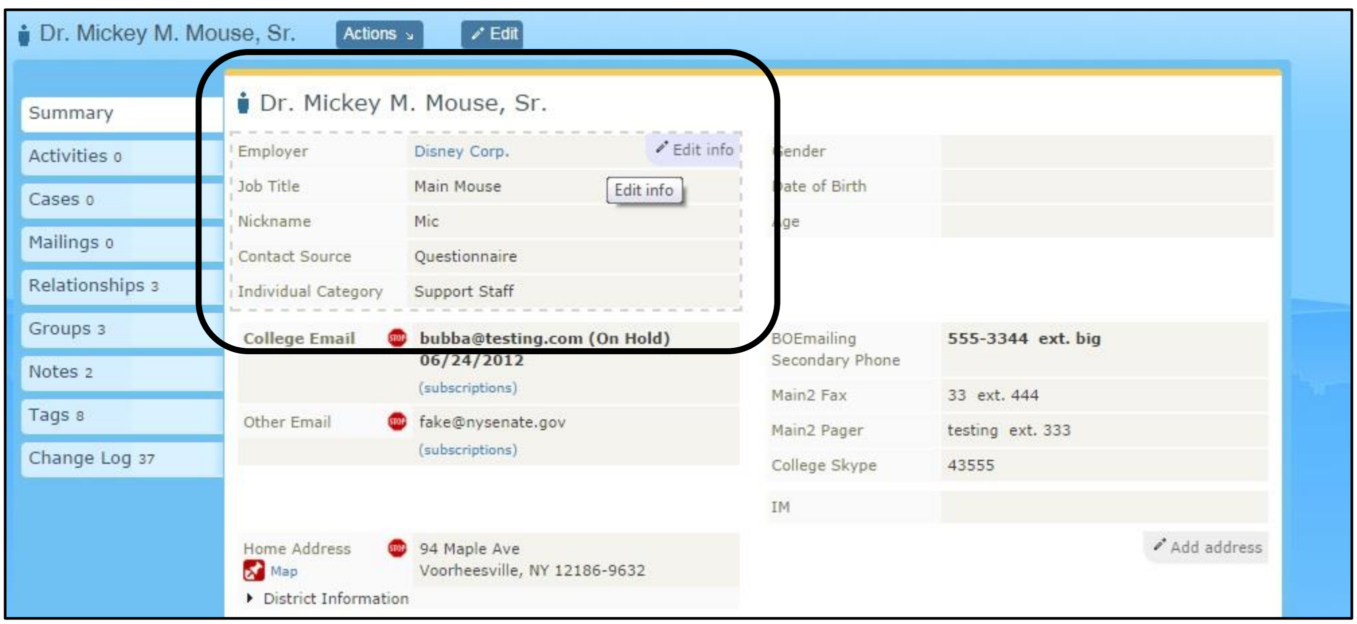
3. Make **desired changes**, then click **Save**.

Editing an Individual Record via the Summary Screen

Several fields can be added or edited directly from the Summary screen. This feature allows you to add or change information without having to open up the full Edit screen.

1. Search the database to find the desired **Contact record**.

2. From the contact record view screen, click on the **Summary tab**. Mouse over the box that has the field you would like to edit and click on the **Edit** or **Add button** that appears in the top right corner of the dotted outlined box.



3. A field box will appear. **Type** in the desired information.

4. When done, click **Save**.

Deleting an Individual Record

You should only delete a record that is a duplicate or that has been created by accident. The delete option is available to people who have specific permissions within Bluebird.

If you choose to delete a record, it is placed in a trash bin. You can later retrieve the record if you have made a mistake. Office Administrators can delete records permanently out of the Bluebird database.

1. Search the database to find the **Contact record** you want to delete.
2. From the contact record view screen, click **Actions** to the right of the name.
3. To the far right, click **Delete Contacts.**
4. A screen will display asking if you are sure, click **Delete contact(s)** to proceed.
5. The screen will refresh and show you the record in the trash; the contact name will be stricken out in red. You have the option to Restore from Trash if it was a mistake.

Deleting Multiple Individual Records

If you choose to delete records, they will be placed in the trash. You can later retrieve or delete permanently. This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.
3. After selecting the desired records, click the **Actions** and then click **Delete contacts.**
4. A screen will display asking if you are sure, click **Delete contact(s)** to proceed.
5. A message box will indicate that contacts were deleted and return you to your Dashboard.

Working with Organization Records

Adding a New Organization Record

1. First, search the database to see if the Organization already exists.

2. From the main navigation area, click **Create** and then click **New Organization**.

3. Fill in **desired fields** then click **Save**. If you have more than one record to add, you can click the **Save and New** button. This will add the current record and bring up a blank record screen where you can add another individual record.

Parts of a New Organization Record Screen

- **Contact Details**: General information about the organization including Organization Name, Employee Identification Number, and Charity Registration.
    - **Free form text boxes**: The name fields can be typed in however you would like, so make sure punctuation and capitalization is correct. How it looks in these boxes is how it will look on a piece of mailing for this record.
    - **District Info:** Based off the mailing address, these fields will auto populate with district information.
    - **Communication Details:** Email address, mass email settings, phone number, and website address. An organization can have multiple addresses and/or phone numbers.
    - **Primary flags**: Provides a way for you to identify the preferred phone number, email address, or mailing address when there are multiple options to choose.
- **File Attachments:** You can attach up to five documents to each organization record. There is a limit of 2MB per item. You can only load image files, PDFs, Microsoft Office documents, and .CSV as attachments. *Please note that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.*
- **Communication Preferences:** Using the Communication Preferences panel you may select whether the Organization does/does not wish to be contacted in a specific manner. When mailing, emailing, or creating merge letters, you can decide how you want to address them using the email, postal, and addressee fields.
    - **Email Greeting**: Salutation for sending emails through the system

  - **Postal Greeting**: Salutation for sending letters
  - **Addressee**: First line of the mailing address, which could be present on mailing labels, envelopes, or the address block in letters
  - **Privacy Options:** Use this area to check off options if an organization asks to **not** be contacted in a specific manner
  - **Privacy Options Note:** Use this box to add a note as to why you selected a specific privacy option
  - **Preferred Methods:** Use this area to check off options if an organization asks to be contacted in a specific manner

- **Notes:** As you work with organizations, you will begin to learn miscellaneous information about them, which can be tracked in the Notes area. The notes area is best used for general details about their business such as office hours.
- **Tags**: Tags are a classification system, divided into three tools:
  - **Issue codes:** a hierarchal tree to classify the organization's interests
  - **Positions:** legislative bills the organization has expressed an interest in
  - **Keywords:** list of words and phrases created by the office
- **Groups**: Groups are used to organize records. There are Smart Groups and Static Groups. For more information, see the section titled **Groups**.

Editing an Organization Record via the Edit button

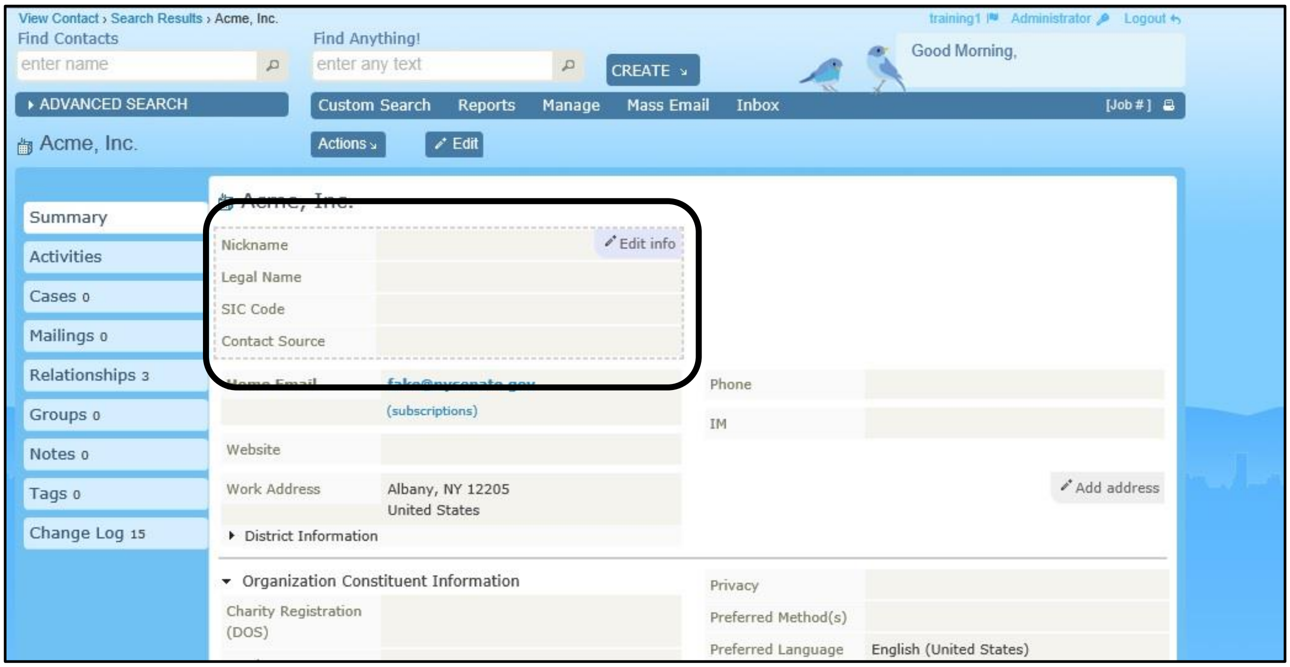
1. Search the database to find the desired **Contact record**.
2. While viewing the contact record, click the **Edit** button next to Actions.
3. Make **desired changes**, then click **Save**.

Editing an Organization Record via the Summary Screen

Several fields can be added or edited directly from the summary screen. This feature allows you to add or change information without having to open up the full Edit screen.

1. Search the database to find the desired **Contact record**.

2. From the contact record view screen, click on the **Summary tab**. Mouse over the box that has the field you would like to edit and click on the **Edit** or **Add button** that appears in the top right corner of the dotted outlined box.



3. A field box will appear. **Type** in the desired information.

4. When done, click **Save**.

Deleting an Organization Record

You should only delete a record that is a duplicate or that has been created by accident. The delete option is available to people who have specific permissions within Bluebird.

If you choose to delete a record, it is placed in a trash bin. You can later retrieve the record if you have made a mistake. Office Administrators can delete records permanently out of the Bluebird database.

1. Search the database to find the **Organization record** you want to delete.
2. While viewing the Organization record, click **Actions** to the right of the name.
3. To the far right, click **Delete Contact.**
4. A screen will display asking if you are sure, click **Delete contact(s)** to proceed.
5. The screen will refresh and show you the record in the trash; the organization name will be stricken out in red. You have the option to Restore from Trash if it was a mistake.

Deleting Multiple Organization Records

If you choose to delete records, they will be placed in the trash. You can later retrieve or delete permanently. This option only works when you are looking for records that have at least one field in common (i.e. same Issue Code).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.
3. After selecting the desired records, click the **Actions** and then click **Delete contacts.**
4. A screen will display asking if you are sure, click **Delete contact(s)** to proceed.
5. A message box will indicate that contacts were deleted and return you to your Dashboard.

Working with Household Records

Adding a new Household Record

1. First, search the database to see if the Household record already exists.

2. From the main navigation area, click **Create**, and then click **New Household**.

3. In the Household Name box, **type a Household name**.

> **Note**: You might want to **add** the word **Family** or **Household** somewhere in the name field (i.e. Smith Family). This will make it easier to distinguish Household records from Individual records when searching. You will want to **avoid adding The** within the name of a Household record since Bluebird already adds this to the Addressee field of a record on an export.

4. Fill in **desired fields** then click **Save**. If you have more than one record to add, you can click the **Save and New** button. This will add the current record and bring up a blank record screen where you can add another Household record.

Parts of a New Household Record

- **Contact Details**: This area has general information about the Household plus Household Name, Nickname, and Source of the Household information.

    - **Free form text boxes**: The name fields can be typed in however you would like, so make sure punctuation and capitalization is correct. How it looks in these boxes is how it will look on a piece of mailing for this record.

    - **District Info:** Based off the mailing address, these fields will auto populate with district information.

    - **Communication Details:** Email address, mass email settings, phone number, and website address. A Household can have multiple addresses and/or phone numbers.

    - **Primary flags**: Provides a way for you to identify the preferred phone number, email address, or mailing address when there are multiple options to choose.

- **File Attachments:** You can attach up to five documents to each contact record. There is a limit of 2MB per item. You can only load image files, PDFs, Microsoft Office documents, and .CSV as attachments. *Please note* that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.

- **Communication Preferences:** Using the Communication Preferences panel you may select whether the Household does/does not wish to be contacted in a specific manner. When mailing, emailing, or creating merge letters, you can decide how you want to address them using the email, postal, and addressee fields.

    - **Email Greeting**: Salutation for sending emails through the system

    - **Postal Greeting**: Salutation for sending letters

    - **Addressee**: First line of the mailing address, which could be present on mailing labels, envelopes, or the address block in letters

    - **Privacy Options:** Use this area to check off options if a Household that asks to **not** be contacted in a specific manner

    - **Privacy Options Note:** Use this box to add a note as to why you selected a specific privacy option (i.e. Person called office asking to no longer receive postal mailings)

    - **Preferred Methods:** Use this area to check off options if a Household asks to be contacted in a specific manner

    - **Preferred Language:** Use this option to select a language if a Household's primary language is something other than English. *Please note: this does not change the language of Bluebird or forms of communication that you send. It is only for office use so you can better communicate with your constituents.*

- **Notes:** As you work with Households, you will begin to learn miscellaneous information about them, which can be tracked in the Notes area. The notes area is best used for general details such as details about their pets or if there is someone in the household with a disability.

- **Tags**: Tags are a classification system, divided into three tools:
    - **Issue codes:** hierarchal tree to classify the Household's interests
    - **Positions:** legislative bills the Household has expressed an interest in
    - **Keywords:** are a list of words and phrases created by the office

- **Groups**: Groups are used to organize records. There are Smart Groups and Static Groups. For more information, see the section titled **Groups**.

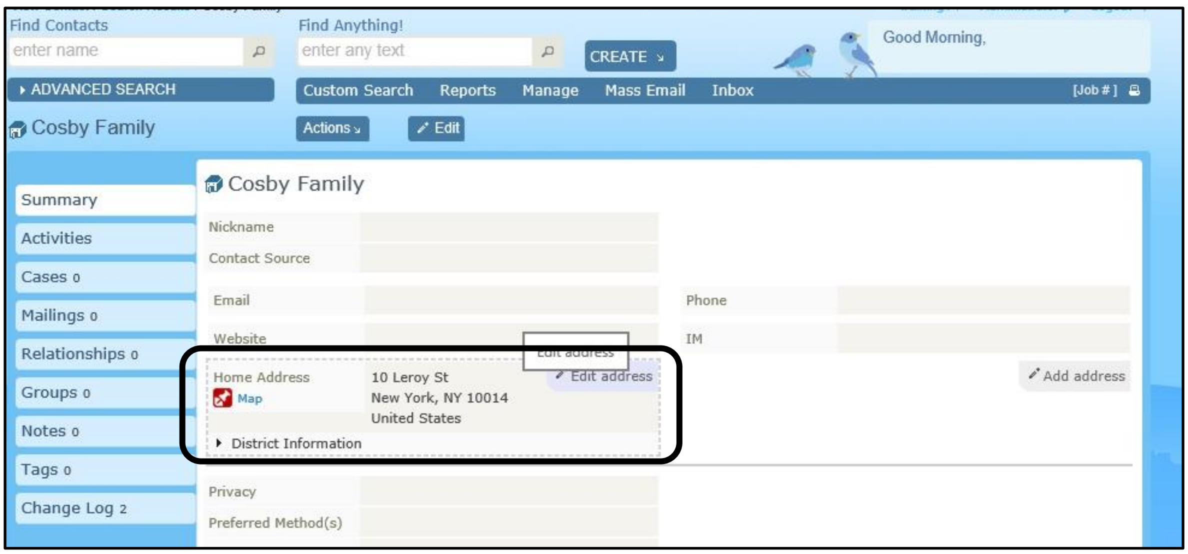
Editing a Household Record via the Edit button

1. Search the database to find the desired **Contact record**.
2. While viewing a Household record, click the **Edit** button next to Actions.
3. Make desired changes, then click **Save**.

Editing a Household Record via the Summary Screen

Several fields can be added or edited directly from the Summary screen. This feature allows you to add or change information without having to open up the full Edit screen.

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Summary tab**. Mouse over the box that has the field you would like to edit and click on **Edit** or **Add** button that appears in the top right corner of the dotted outlined box.



3. A field box will appear. **Type** in the desired information.
4. When done, click **Save**.

Deleting a new Household Record

You should only delete a record that is a duplicate or that has been created by accident. The delete option is available to people who have specific permissions within Bluebird.

If you choose to delete records, they will be placed in a trash bin. You can later retrieve or delete permanently.

1. Search the database to find the **Contact record** you want to delete.
2. From the contact record view screen, click **Actions** to the right of the name.
3. To the far right, click **Delete Contacts.**
4. Click **Delete contact(s)** to proceed.
5. When done, click the link **Return to home page**. (Clicking Cancel will return you to the contact record.)

Note: After a record has been deleted, the name of the contact will be crossed out in red.

Deleting Multiple Household Records

If you choose to delete records, they will be placed in the trash. You can later retrieve or delete permanently. This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.
3. After selecting the desired records, click the **down arrow** across from actions and then click **Delete contacts.** This will delete the contacts and place them in a Trash area where you can either restore them back in to the database.
4. Click **Go**.
5. Click **Delete contact(s)** to proceed.
6. A message box will indicate that contacts were deleted and bring up an empty search results screen.

Notes

Track miscellaneous information about Contacts in the Notes area.

Adding a Note

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click the **Notes tab**.
3. Click **Add Note**.
4. Fill in **desired information**, click **Save** when done.

Viewing a Note

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click the **Notes tab**.
3. Across from desired Note, click **View**. When finished click **Done**.

Editing a Note

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click the **Notes tab**.
3. Across from desired Note, click **Edit**. Make desired **changes** and click **Save**.

Adding a Comment to a Note

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click the **Notes tab**.
3. Across from desired Note click **More**, then click **Comment**.
4. Add desired **Comment** and click **Save**.

Note: You cannot search on Comment text, only the Subject and Body text.

Deleting a Note

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click the **Notes tab**.
3. Across from desired Note click **More**, then click **Delete**. Click **OK** when prompted.

Change Log

The Change Log is used to track the history of any changes made to the record.

Change Log will record the following:

Action: what was done to the information

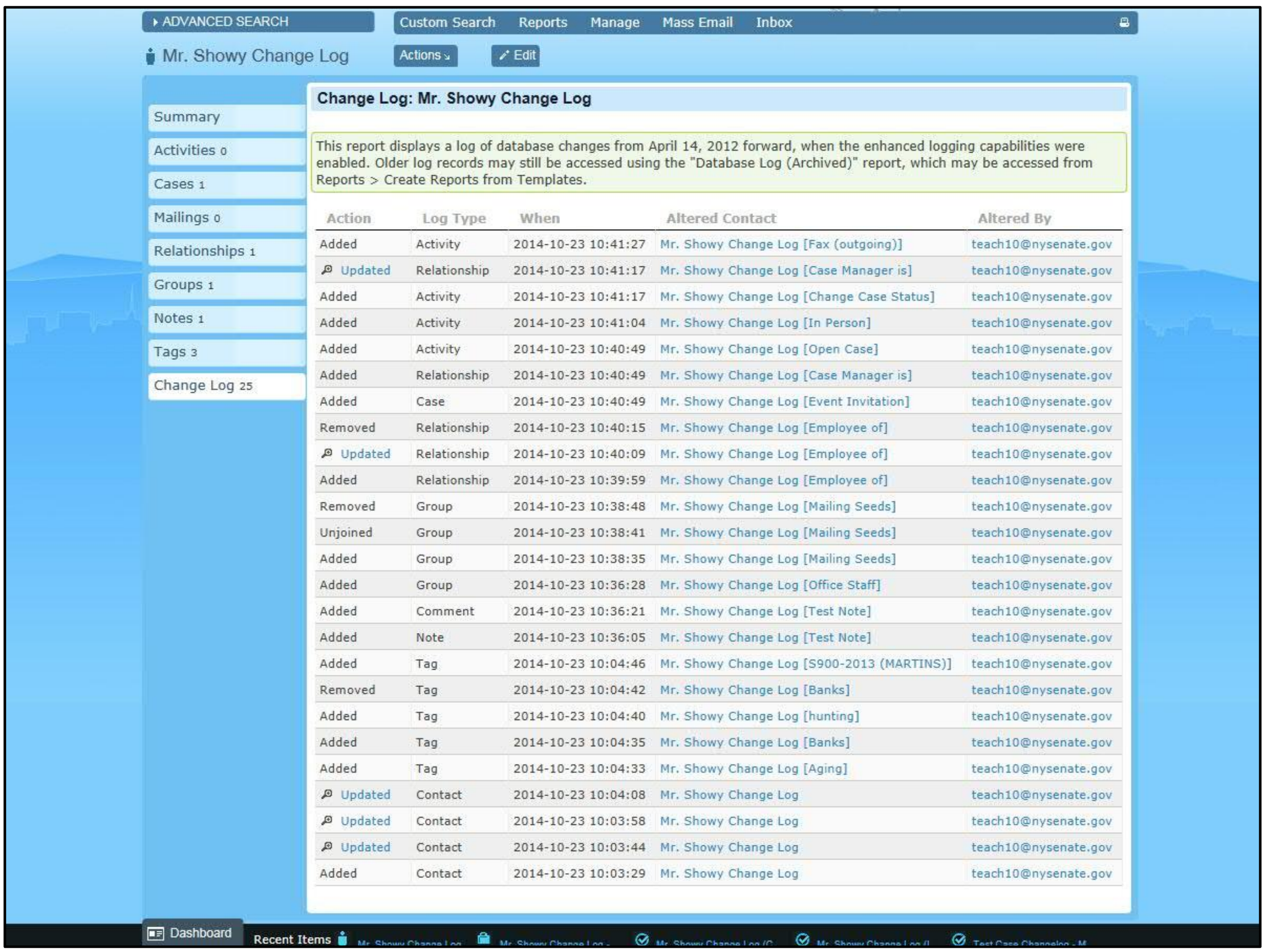
Log Type: what tab or field on the record was modified

When: the date and time of the change

Altered Contact: will show detailed information on changes made to the contact record

Altered By: staff person who changed the record

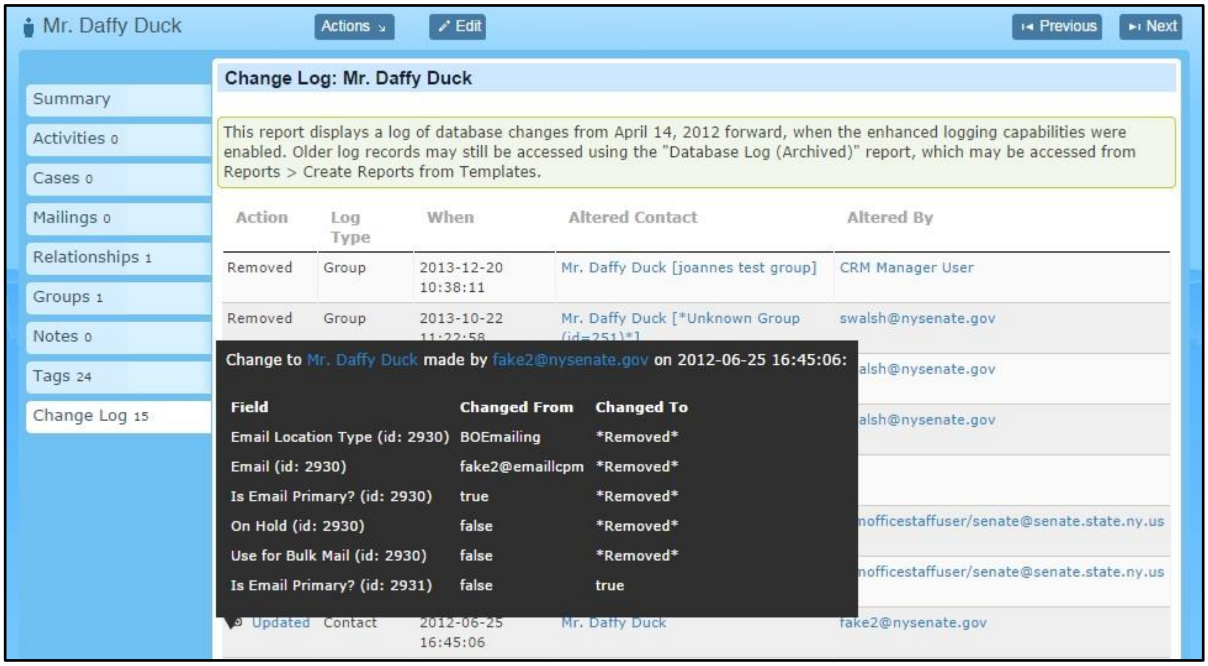
Below is an image of various changes that can be done to a record:



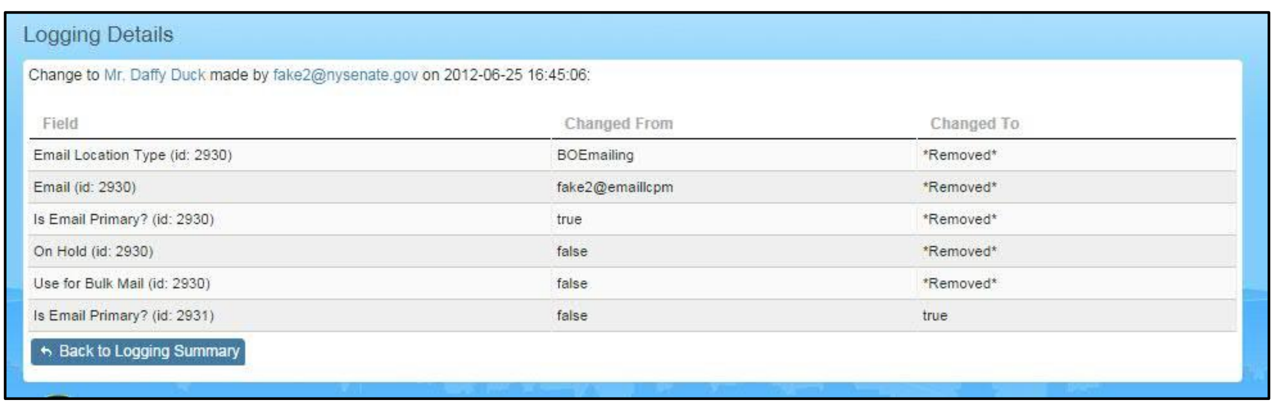
Action	Log Type	When	Altered Contact	Altered By
Added	Activity	2014-10-23 10:41:27	Mr. Showy Change Log [Fax (outgoing)]	teach10@nysenate.gov
Updated	Relationship	2014-10-23 10:41:17	Mr. Showy Change Log [Case Manager is]	teach10@nysenate.gov
Added	Activity	2014-10-23 10:41:17	Mr. Showy Change Log [Change Case Status]	teach10@nysenate.gov
Added	Activity	2014-10-23 10:41:04	Mr. Showy Change Log [In Person]	teach10@nysenate.gov
Added	Activity	2014-10-23 10:40:49	Mr. Showy Change Log [Open Case]	teach10@nysenate.gov
Added	Relationship	2014-10-23 10:40:49	Mr. Showy Change Log [Case Manager is]	teach10@nysenate.gov
Added	Case	2014-10-23 10:40:49	Mr. Showy Change Log [Event Invitation]	teach10@nysenate.gov
Removed	Relationship	2014-10-23 10:40:15	Mr. Showy Change Log [Employee of]	teach10@nysenate.gov
Updated	Relationship	2014-10-23 10:40:09	Mr. Showy Change Log [Employee of]	teach10@nysenate.gov
Added	Relationship	2014-10-23 10:39:59	Mr. Showy Change Log [Employee of]	teach10@nysenate.gov
Removed	Group	2014-10-23 10:38:48	Mr. Showy Change Log [Mailing Seeds]	teach10@nysenate.gov
Unjoined	Group	2014-10-23 10:38:41	Mr. Showy Change Log [Mailing Seeds]	teach10@nysenate.gov
Added	Group	2014-10-23 10:38:35	Mr. Showy Change Log [Mailing Seeds]	teach10@nysenate.gov
Added	Group	2014-10-23 10:36:28	Mr. Showy Change Log [Office Staff]	teach10@nysenate.gov
Added	Comment	2014-10-23 10:36:21	Mr. Showy Change Log [Test Note]	teach10@nysenate.gov
Added	Note	2014-10-23 10:36:05	Mr. Showy Change Log [Test Note]	teach10@nysenate.gov
Added	Tag	2014-10-23 10:04:46	Mr. Showy Change Log [S900-2013 (MARTINS)]	teach10@nysenate.gov
Removed	Tag	2014-10-23 10:04:42	Mr. Showy Change Log [Banks]	teach10@nysenate.gov
Added	Tag	2014-10-23 10:04:40	Mr. Showy Change Log [hunting]	teach10@nysenate.gov
Added	Tag	2014-10-23 10:04:35	Mr. Showy Change Log [Banks]	teach10@nysenate.gov
Added	Tag	2014-10-23 10:04:33	Mr. Showy Change Log [Aging]	teach10@nysenate.gov
Updated	Contact	2014-10-23 10:04:08	Mr. Showy Change Log	teach10@nysenate.gov
Updated	Contact	2014-10-23 10:03:58	Mr. Showy Change Log	teach10@nysenate.gov
Updated	Contact	2014-10-23 10:03:44	Mr. Showy Change Log	teach10@nysenate.gov
Added	Contact	2014-10-23 10:03:29	Mr. Showy Change Log	teach10@nysenate.gov

On the Change Log, you may see the term **Updated** in the Actions column. This appears when a change is made to the record's Summary tab. For example, an email address was changed or a phone number was added to the record. If you see Updated, there are two ways you can view this information:

You can **mouse** over the magnifying glass to the change in more detail



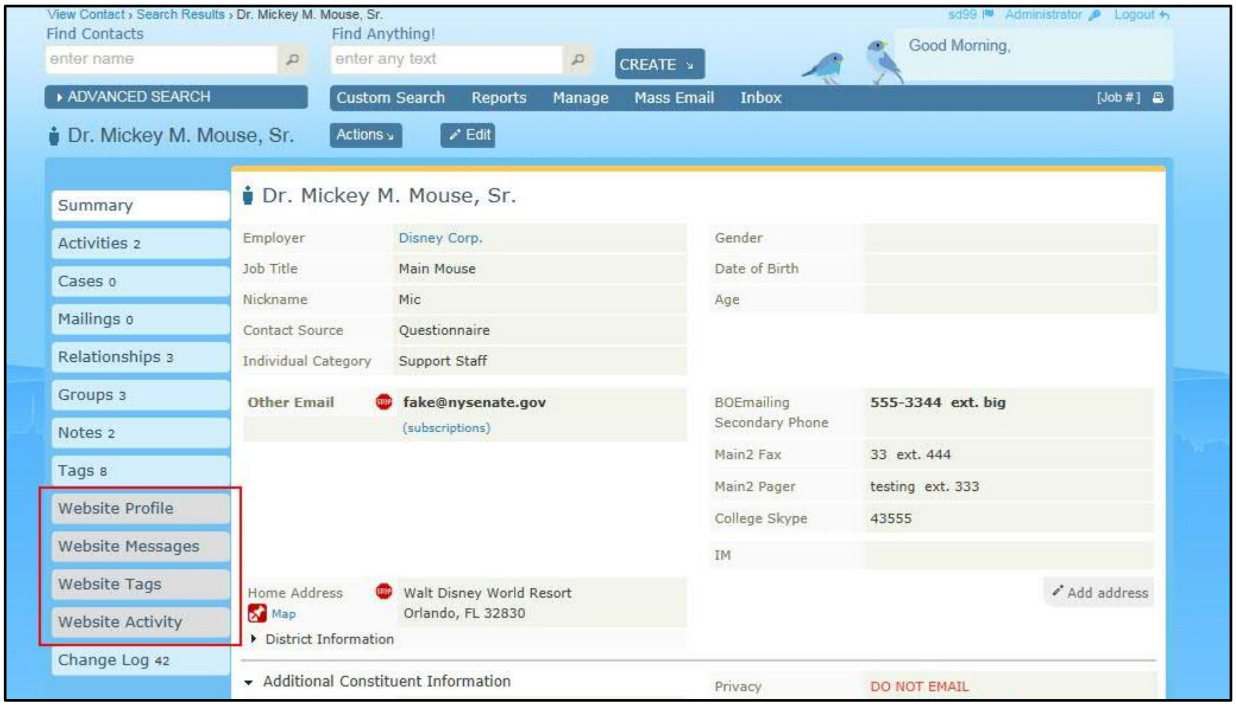
You may **click** on the magnifying glass to open a screen with the details listed out



After viewing the logging details, click on **Back to Logging Summary** to get back to the record's change log.

NYS Senate Website and Bluebird integration

There is Bluebird functionality that pulls data from the NYSenate.gov website and brings it into the appropriate Bluebird database. Website user actions, such as following a bill, following an issue, voting AYE or NAY on a bill, or editing a profile, all result in corresponding Bluebird updates for that contact. These changes can be seen within Bluebird in a constituent record with four new tabs: Website Profile, Website Messages, Website Tags, and Website Activity.



Website Profile: this tab collects all the basic information a constituent provides when signing up for a website account (First Name, Last Name, address, etc.).

Website Messages: this tab shows all messages sent to the Senator from the constituent, this page includes a Message Type column, a Date column, and a Message column. *Note: the subject line of the message will display in the first line of the Message column.*

Website Tags: this tab shows any Bills (Positions), Committees, Issues, or Petitions that the constituent has decided to follow. They are separated out by type. These can be searched within Advanced Search just like normal tagging can.

Website Activity: this tab shows all activity a constituent is doing within the website, similar to the Change Log of a record.

Tags

Bluebird has three types of Tags to allow you to categorize and organize your records. The three tag types are Issue Codes, Keywords, and Positions. There is no Save button on this page, by default this page auto-saves.

> **Note**: The Office Administrator role has the ability to merge, edit, or delete tags from the manage tags screen. See section titled **Office Administrators**.

Issue Codes

Issue Codes are a pre-defined list used to classify records. They help to indicate that the contact has a particular interest or concern in the selected areas. They are broken down into two categories:

- **Parent Codes:** These types of codes are vague.
- **Child Codes:** These types of codes reside under the parent codes and tend to be more specific.

Keywords

Keywords are especially useful for users that cannot manage tags. Keywords are free-form text that quickly and easily classify your records. For example, if one person writes in about a topic that is not already an issue code, you can create a Keyword for that topic. This allows staff to still record a person's interest.

As you begin typing a Keyword, a dropdown list will populate with possible matches. If the Keyword you are entering does not exist, the list will only display what you typed and give you the option to create it as a Keyword.

Positions

Positions allow you to track actual pieces of legislation that a constituent is concerned about by using pre-populated bill numbers. This information comes from Open Leg on nysenate.gov.

Selecting Issue Codes for a Single Record

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click **Tags**.
3. Under Issue Codes, click the **box** for each issue code you want to add to this contact's record. Use the search box at the top of the list to narrow down the list.

Deselecting Issue Codes from a Single Record

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Tags tab**. Selected issue codes will be checked off.
3. To deselect an Issue Code, click the **box** that is/are selected to remove the check.

Selecting Issue Codes for Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Tag Contacts (assign tags)**.
4. Click **Go**.
5. Check box for **desired Issue Code**.
6. Click **Tag Contacts**.

Deselecting Issue Codes from Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same last name).

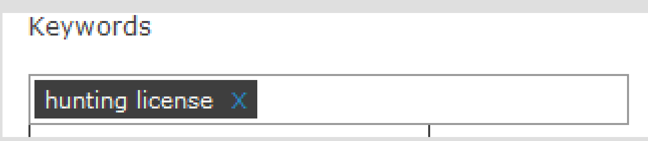
1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Untag Contacts (remove tags)**.
4. Click **Go**.
5. Check box for **desired Issue Code** that you want to remove.
6. Click **Remove Tags from Contacts**.

Selecting Keywords for a Single Record

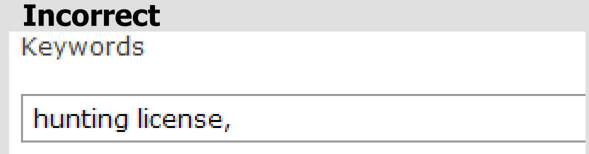
1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Tags tab**.
3. Click in the Keywords box and begin typing the **desired keyword**. (A minimum of 3 characters need to be entered before a list of existing Keywords will appear.)
4. Click the **desired option** from the dropdown list.

Note: When adding a Keyword, make sure the Keyword text appears within a black box with a blue X. If the entry appears as text, only it will not save.

Correct

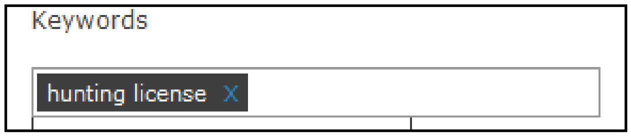


Incorrect



Removing Keywords from a Single Record

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Tags tab**.
3. In the Keywords box, click the **X** next to the Keyword that you want to remove.



4. When done, click the Summary tab and then click **refresh** on the browser.

Selecting Keywords for Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same zip).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Tag Contacts (assign tags)**.
4. Click **Go**.
5. Click in the Keywords box and begin typing the **desired keyword**. (*A **minimum of three characters*** need to be entered before a list of existing Keywords will appear. If the Keyword you are entering does not exist, the list will only display what you typed.)
6. Click the **desired option**. If necessary, repeat until all Keywords have been added.
7. Click **Tag Contacts**.

Removing Keywords from Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Untag Contacts (remove tags)**.
4. Click **Go**.
5. Click in the Keywords box and begin typing the **desired keyword**. (*A **minimum of three characters*** need to be entered before a list of existing Keywords will appear. If the Keyword you are entering does not exist, the list will only display what you typed.)
6. Click the **desired option**. If necessary, repeat until all Keywords have been added.
7. Click **Remove Tag Contacts**.

Adding Positions to a Single Record

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Tags tab**.
3. Click in the Positions box and begin typing the **desired bill number** beginning with an **S** for Senate or an **A** for Assembly. (A minimum of three characters need to be entered before a list of bills will appear.)
4. Click the **desired option**. If necessary, repeat until all Positions have been added.
5. The next time you view the Tags screen, there will be a link to OpenLeg (nysenate.gov) displaying more information about the bill.

Removing Positions from a Single Record

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Tags tab**.
3. In the Positions box, click the **X** next to the Position that you want to remove.

Adding Positions to Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Tag Contacts (assign tags)**.
4. Click **Go**.
5. Click in the Positions box and begin typing the **desired bill number** beginning with an **S** for Senate or an **A** for Assembly. (*A* ***minimum of three characters*** need to be entered before a list of bills will appear.)
6. Click the **desired option** from the dropdown list. (If necessary, repeat this step until all Positions have been added to the box.)
7. Click **Tag Contacts**.

Removing Positions from Multiple Records

This option only works when you are looking for records that have at least one field in common (i.e. same last name).

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click the **down arrow** across from actions and then click **Untag Contacts (remove tags)**.
4. Click **Go**.
5. Click in the Positions box and begin typing the **desired text** that you want to remove. Click the **desired option** from the dropdown list.
6. Click **Remove Tag Contacts**.

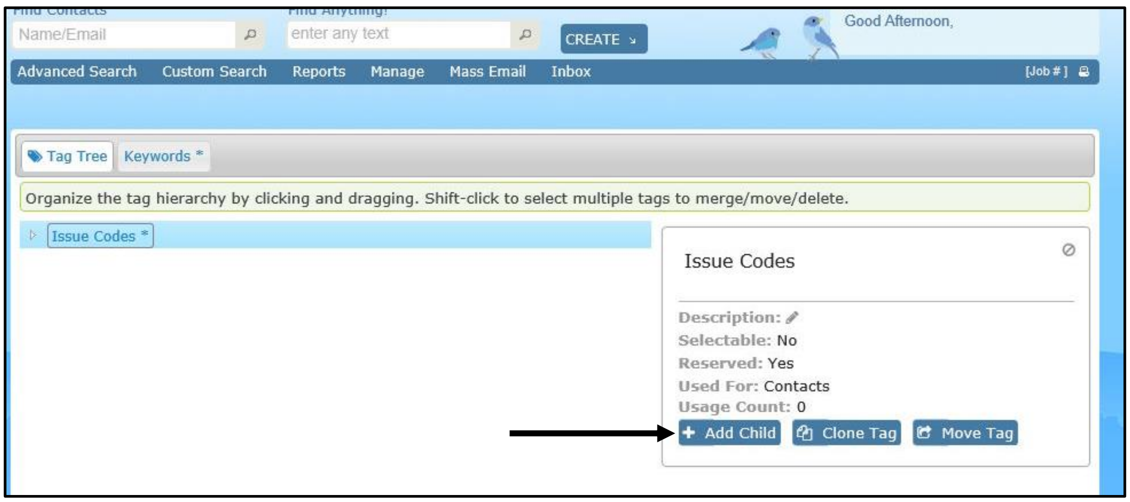
> **Note**: No role within Bluebird can delete Positions. The Positions are available based off what is available in OpenLeg. Since you are searching actual legislation, you need to be able to search all bills.

Managing Tags – Office Administrators Only

Note: If you do not see the Issue Code or the Keyword that you would like to change, refresh your browser (F5) to get the most up to date list. When the Manage Tags screen refreshes, it will put everything in alphabetical order.

Creating a New Issue Code

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Click on the **Tag Tree** button at the top of the screen.
3. Click on **Issue Codes** for the information box to appear on the right side of the screen.
4. To add an Issue Code click on the **Add Child** button that appears in information box.



5. Fill in the **name** of the Issue Code you want to add in the Name field. If desired add a **Description**. If creating a parent Issue Code **select Issue Code** in the Parent Tag drop down menu. If creating a child code under a parent Issue Code then select the **proper parent Issue Code (i.e. Aging)** within the Parent Tag drop down menu. Leave a **check box** in Selectable box. Click **Save**.

Note: The Reserved field is used to lock down an Issue Code. Office Administrators can uncheck this box, allowing them to delete the Parent Issue Code. Before you delete a Parent Issue Code make sure that all the Child Issue Codes are deleted first, and that no record is tagged with the Issue Code.

Editing an Issue Code

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Click on the **Tag Tree** button at the top of the screen.
3. Select the **Issue Code** from the tree that you need to edit. When the Issue Code is selected, the information for that Issue Code will show up in the box to the right of the tree. Within this box, you can use **inline editing** to make any necessary changes. After making edits to the any field, press **Enter** or click the **check mark** to save.

Creating a New Keyword

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Choose the **Keywords** button at the top of the screen.
3. Click on the **+Add Tag** button to the right of Keywords list.
4. Fill in **desired information**; keep the Selectable box **checked**; click **Save**.

> **Note**: The Reserved field is used to lock down a Keyword. Office Administrators can uncheck this box, allowing them to delete the Keyword. Before you delete a Keyword, make sure that no record is tagged with the Keyword.

Editing a Keyword

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Choose the **Keywords** button at the top of the screen.
3. Select the Keyword you would like to edit from the list.
4. When a Keyword is selected, the information for that Keyword will show up in the box to the right of the list. Within this box, you can use **inline editing** to make any necessary changes. After making edits to the any field, press **Enter** or click the **check mark** to save.

Moving an Issue Code to a Keyword

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.

2. Click on the **Tag Tree** button at the top of the screen.

3. Click the **triangle** to the left of Issue Codes to expand the tree. Select the **Issue Code** from the tree that you need to move. When the Issue Code is selected, the information for that Issue Code will show up in the box to the right of the tree. Within this box, select the **Move Tag** button.

4. In the Move to Tagset pop-up box that appears, click in the **Select Tagset** drop down menu and select **Keywords**, then click **Continue**.

5. The screen will refresh automatically and a pop-up message with say successfully moved.

Moving a Keyword to an Issue Code

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.

2. Click on the **Keywords** button at the top of the screen.

3. Select the Keyword from the list that you need to move. When the Keyword is selected, the information for that Keyword will show up in the box to the right of the list. Within this box, select the **Move Tag** button.

4. In the Move to Tagset pop-up box that appears, click in the **Select Tagset** drop down menu and select **Main Tag Tree**, then click **Continue**.

5. The screen will refresh automatically and a pop-up message will say Saved.

6. Select the **Tag Tree** button at the top of the screen, you will see the moved Keyword as an Issue Code now but it will be above the Issue Codes tree. Click the **triangle** to the left of Issue Codes to expand the tree.

7. Select one of the following options:

    - If you would like the Issue Code to be a **parent code** you can **click**, **drag**, and **drop** the new Issue Code at the top of the screen onto the word Issue Code to add it into the tree. The arrow pointer will show a green check mark when it is over the right spot and a red check mark when it is not over a proper spot on the screen.

- If you would like the Issue Code to be a **child code** you can select the new **Issue Code** at the top of the screen and **click** and **drag** the new **Issue Code** over the word **Issue Codes**, this will open the Issue Code tree automatically and allow you to scroll down the screen and look for the proper parent Issue Code. Once you see the preferred parent Issue Code, simply **release** your mouse directly over the parent Issue Code and it will be added to the tree. The arrow pointer will show a green check mark when it is over the right spot and a red check mark when it is not over a proper spot on the screen.

8. Once you have selected where to put the Issue Code within the list, it will move to that spot, however the list will not be in alphabetical order. The screen will need to refresh in order to re-sort. You can achieve this by pressing **F5** on the keyboard, clicking the **refresh button** within the browser, or clicking the **Dashboard** button within Bluebird and going back into the Manage Tags screen.

Merging Issue Codes

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Choose the Tag Tree button at the top of the screen.
3. Click the **triangle** to the left of Issue Codes to expand the tree. Select an **Issue Code** you would like to merge from the tree, hold the **Ctrl key** down on the keyboard and select all other **Issue Codes** you would like to merge from the Issue Code list, you may select more than two.
4. Once all Issues Codes are selected, click the **Merge Tags** button in the information box to the right of the Issue Code list.
5. A confirmation box appears, Bluebird will fill in a **name of the combined tag** for you, but you have the ability to edit this if necessary. When done, click **Merge**.
6. The Issue Codes tree will refresh with the new codes updated and you will see a pop-up confirmation that the tags were successfully merged together.

Note: To merge two Issue Codes both Issue Codes need to be unmarked reserved. The merging process can be slow depending on how many records are tagged with the merging Issue Code, please be patient, if the browser tag has a blue spinning circle it is still working.

Merging Keywords

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Choose the Keywords button at the top of the screen.
3. Select a **Keyword** you would like to merge from the list, hold the **Ctrl key** down on the keyboard and select all other **Keywords** you would like to merge from the Keyword list, you may select more than two.
4. Once all Keywords are selected, click the **Merge Tags** button in the information box to the right of the Keyword list.
5. A confirmation box appears, Bluebird will fill in a **name of the combined tag** for you, but you have the ability to edit this if necessary. When done, click **Merge**.
6. The Keywords list will refresh with the new Keywords updated and you will see a pop-up confirmation that the tags were successfully merged together.

Deleting an Issue Code or a Keyword

1. From the main navigation area, click on **Manage,** and then click **Manage Tags**.
2. Select the **Issue Code** or **Keyword** you would like to delete.
3. Click **Delete** button in the information box to the right of the list of tags.
4. A confirmation box will appear on the screen, click **Delete**.

Note: for all Issue Codes you will need to edit and uncheck the reserved box before deleting. In addition, in order to remove a parent Issue Code, you will need to move or remove all child Issue Codes beneath it.

Relationships

Relationships allow you to connect two contacts by creating a quick link within their records. In order to connect two records both contacts have to be in Bluebird. See section titled **Understanding Contact Records** in this manual to see more information.

Types of Relationships

Individual Relationship: A relationship connecting two Individual Contact records (i.e. spouse/spouse).

Organization Relationship: A relationship connecting an Individual Contact record and an Organization record (i.e. employer/employee).

Household Relationship: A relationship connecting Individual records all living at the same address to a Household record (i.e. Smith Family or Smith Household).

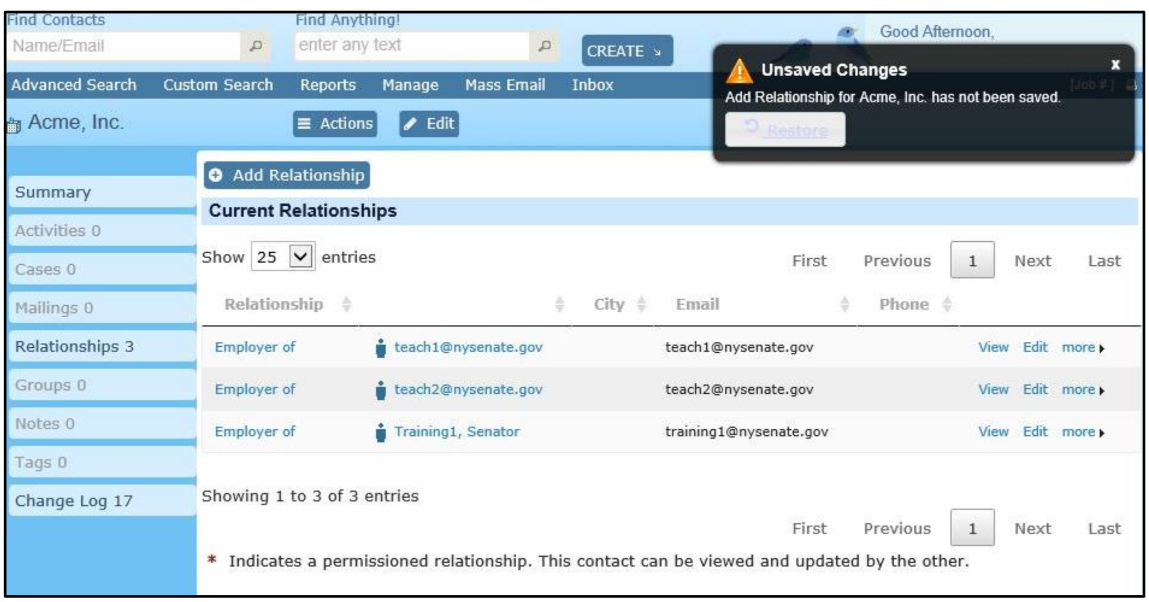
Relationship Type Dropdown Menu

The Relationship Type dropdown menu will differ based on what Record type you were viewing when selecting Add Relationship from their Relationship tab. This drop down menu will determine the results in the Select Contact auto fill box. You will see the most amount of options for an Individual record type.

Creating an Individual Relationship

1. Find one of the Contact records that you want to build a relationship.
2. From the contact record view screen, click the **Relationships tab**.
3. Click the **Add Relationship** button.
4. Click **the dropdown arrow** across from Relationship Type.
5. Click **the desired relationship choice** from the list.
   - If picking Employee/Employer relationship you will see a check box for current employee
6. Click in the **Contact(s) box** and begin **typing the last name** of the contact you want to add to the relationship.
7. Click the **desired name** from the auto-complete list so the name appears in the box. Use the Refined Search options to help narrow down the list.
8. If desired add a **description** and a **note**. Make sure **Enabled** stays **checked**.
9. Click **Save Relationship** button at the bottom of the box.

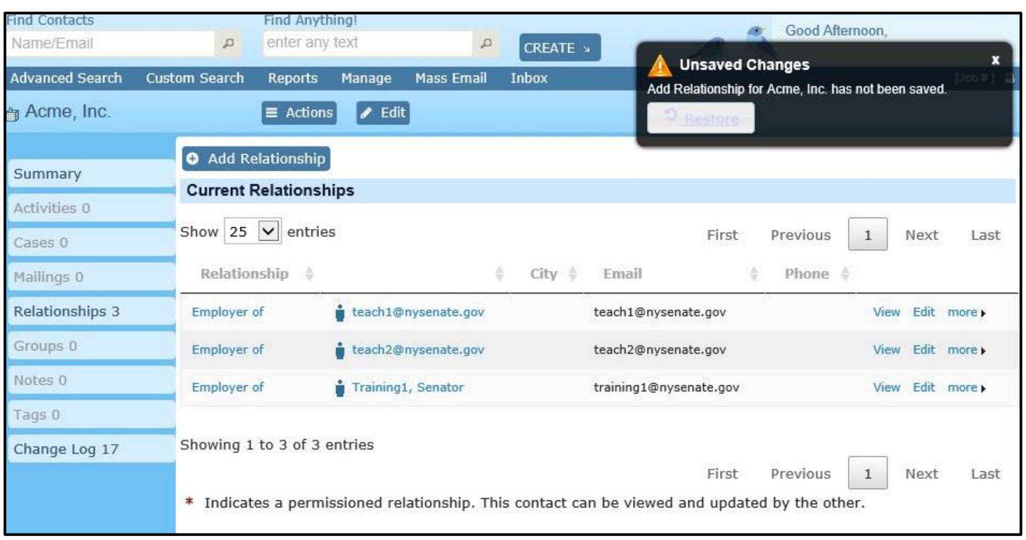
If you accidentally close out of the relationship box by clicking on Cancel or the X in the top right of the box, a pop-up message will come up with a Restore option so you can open the relationship box again. This message will go away after several minutes on its own.



Creating an Organization Relationship

1. Search the database to find the desired **Organization record.**
2. From the Organization record view screen, click on the **Relationships tab**.
3. Click on **Add Relationship**.
4. Click the **dropdown arrow** across from Relationship Type.
5. Click the **desired relationship** choice from the list.
6. Click in the **Contact(s) box** and begin typing the **last name** of the contact you want to add to the **Organization**.
7. Click the **desired name** from the auto-complete list so the name appears in the box. Use the Refined Search options to help narrow down the list.
    - If picking Employer/Employee relationship you will see a check box for current employee
8. If desired add a **Start Date** and **End Date** for this relationship. This can be used for employees of a certain business. This field can be edited later on if you would like to update their record once someone leaves a company.
9. If desired add a **description** and a **note**. Make sure **Enabled** stays **checked**.
10. Click **Save Relationship** button at the bottom of the box.

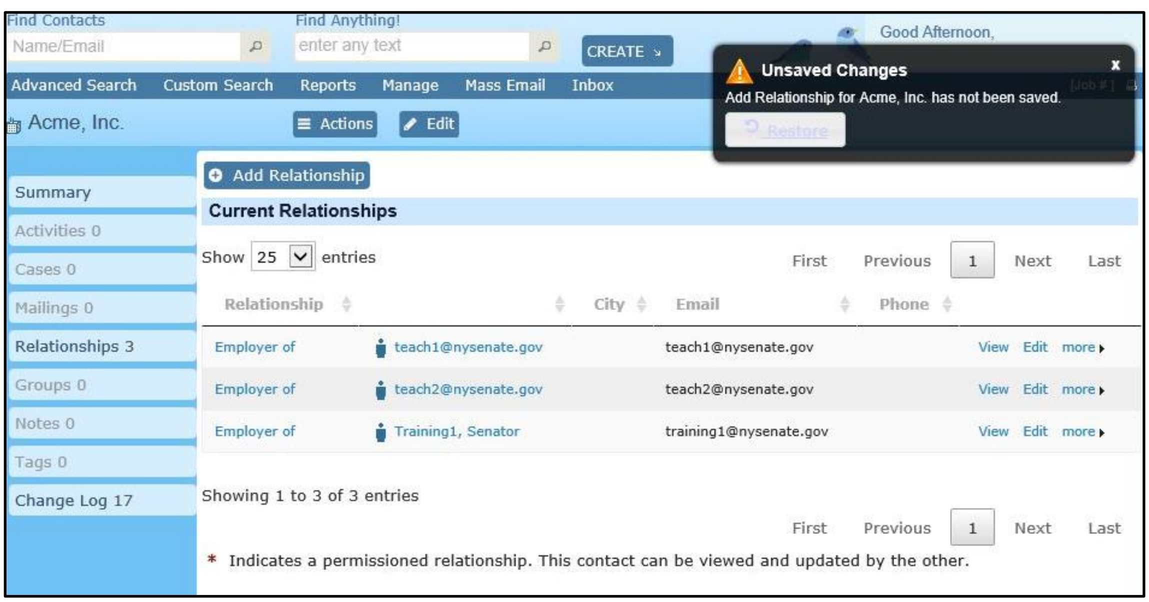
If you accidentally close out of the relationship box by clicking on Cancel or the X in the top right of the box, a pop-up message will come up with a Restore option so you can open the relationship box again. This message will go away after several minutes on its own.



Creating a Household Relationship

1. Find one of the household records that you want to build a relationship.
2. From the household record, click the **Relationships tab**.
3. Click the **Add Relationship** button.
4. Click **the dropdown arrow** across from Relationship Type.
5. Click **the desired relationship choice** from the list.
6. Click in the **Contact(s) box** and begin **typing the last name** of the contact you want to add to the relationship.
7. Click the **desired name** from the auto-complete list so the name appears in the box. Use the Refined Search options to help narrow down the list. If you need to add more than one contact to the relationship (i.e. adding multiple members of a family as members of the household) select the **name** from the auto-fill list, once the name is showing in the box, click to the **right of the name** and start searching again. Continue doing this until all of the records are selected.
8. If desired add a **description** and a **note**. Make sure **Enabled** stays **checked**.
9. Click **Save Relationship** button at the bottom of the box.

If you accidentally close out of the relationship box by clicking on Cancel or the X in the top right of the box, a pop-up message will come up with a Restore option so you can open the relationship box again. This message will go away after several minutes on its own.



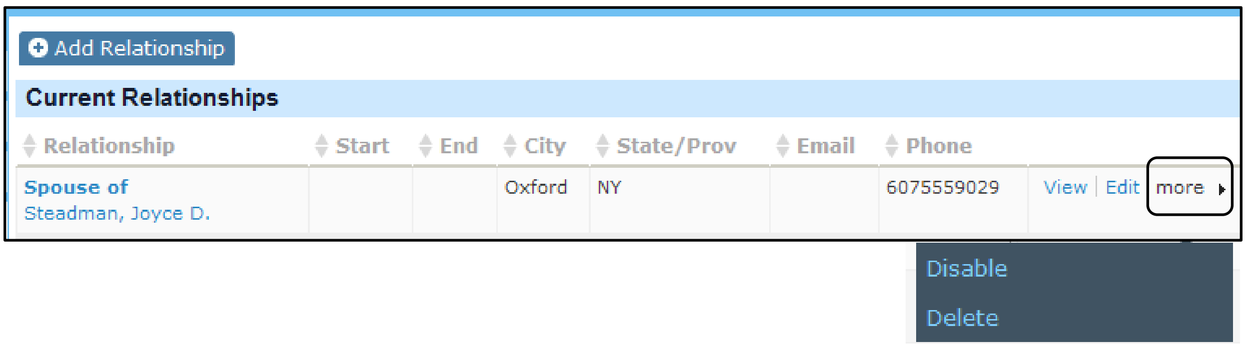
Disabling a Relationship from a Record

The advantage of disabling a relationship is that you are able to retain an ongoing history of the contact's interactions with other contacts.

1. Search the database to find the desired **Contact record** that you want to remove the relationship from.

2. From the contact record, click on the **Relationships tab.**

3. A listing of Current Relationships will display. Click **more** across from the desired choice.



4. Click **Disable** from the menu. Click **OK** at the prompt.

This contact now appears in the Inactive Relationships section.

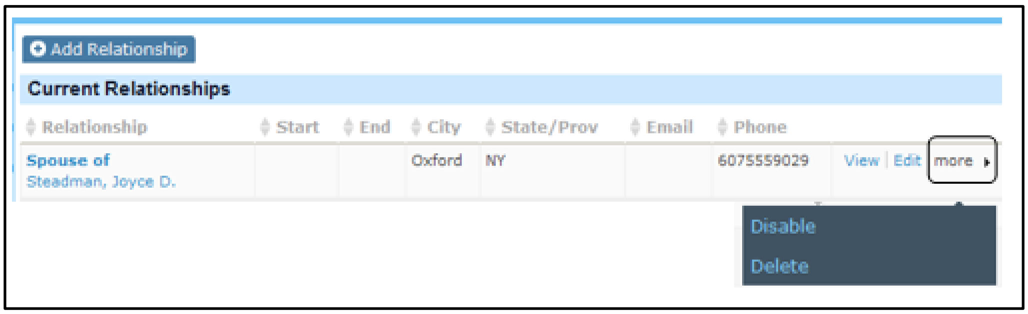
Deleting a Relationship from a Record

You should only delete a Relationship if you made a mistake; otherwise, you should use the Disabling a Relationship option.

1. Search the database to find the desired **Contact record** that you want to delete the relationship from.

2. From the contact record view screen, click **Relationships.**

3. A listing of Current Relationships will display. Click **more** across from the desired choice.



4. Click **Delete** from the menu. Click **OK** at the prompt.

Groups

Understanding Groups

Groups are used to collect and organize records. Within Bluebird, you can create either Static Groups or Smart Groups.

- **Static Groups** provide a way for you to organize contacts that might not have similar criteria. In this case, you will need to look up each contact record to add to a specific static group.

  For example, you might want to keep track of principles within a school district. You would create a static group and then manually add contacts to the static group you created. This can be done through the contact's Groups tab or from the Manage menu on the main navigation area.

- **Smart Groups** provide a way for you to organize your records by criteria. Smart Groups are created after running a search, where the search criteria create the rules for the group. Saving a smart group does not save the records in the result list; it saves whatever criteria you defined in the search. That means every time you view the smart group you are pulling an updated list of contacts who meet that criteria.

  For example, if you searched for all female constituents in Albany, you could save that search for future use and title it Albany Women Smart Group. If another staff person enters a new contact that is female and lives in Albany, she would appear in the Albany Women Smart Group results the next time it is run because she meets the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, click **New Group**.
2. Type a **name for** the group.
3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
4. If planning to send a mass email to this group **check** the **email list** box.
5. If desired, choose a **Parent Group**.
6. Click **Continue**.

Creating a Static Group from a Search

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click **actions**, then click **Group** - **add contacts.**
4. Click radio button in front of **Create New Group**.
5. In the Group Name box, type a **name** for the group.
6. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
7. If planning to send a mass email to this group **check** the **email list** box.
8. If desired, choose a **Parent Group**.
9. Click on **Add to Group**.

Adding a Single Contact to a Static Group

1. Search the database to find the desired **Contact record** you want to add to the static group.
2. From the contact record view screen, click the **Groups tab**.
3. Click **Add to a group** and click the **desired group**.
4. Click **Add.**

You will now see the Group listed in the Contact Record's Groups tab under Regular Groups.

Adding Multiple Contacts to a Static Group

1. Search the database to find all of the desired **Contact records** you want to add to the static group.
2. Select the **desired records** and then click **Actions**.
3. Click **Group - add contacts**.
4. Make sure the radio button is for **Add Contacts to Existing Group** is selected.
5. Click the **down arrow** across from Select Group and then click on the **desired group**.
6. Click **Add to Group.**

Editing a Static Group

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.
2. Click on **more**, across from the Group that you would like to edit.
3. When you click on **more**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**, click on **Settings**.
4. Make **desired changes**.
5. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

Removing a Contact from a Static Group

1. Search the database to find the desired **Contact record** you want to remove from the static group.

2. From the contact record view screen, click on the **Groups tab**.

3. Click **Remove** across from the Group you want to remove.

When someone has been removed from a Group, they are not deleted. Instead, they are placed into a Past Groups section on the contact record's Groups tab. They can be added back by clicking **Rejoin Group**.

Disabling a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to disable.

3. Click **Disable** from the menu. Click **OK** at the prompt.

The Disabled group will appear in a lighter font shade (see Guilderland Central School District below).

The next time you return to the Manage Groups screen, you will **not** be able to view disabled groups until you apply the check mark next to Disable in the upper right hand corner.

Note: To Enable an Inactive Group: click on the **Manage menu**, then click on **Manage Groups**, remove the check mark from Enable and apply the check mark for Disable, click **Search**. Then across from the Group, click **More**, **Enable**, click **OK** at the prompt.

Deleting a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to delete.

3. Click **Delete** from the menu.

4. Click **Delete Group**. The message popup box will indicate that the Group has been deleted.

Adding Staff Members to the Email Seeds Static Group

To add one person at time:

1. Search the database to find the **office staff record** you want to add to this group.
2. While looking at the record of the office staff member, click on the **Groups** tab.
3. Click the **dropdown arrow** across from Add to a group and click **Email Seeds** from the list.
4. Click **Add.** This contact is now added into this group.

To bulk add

1. Click in the Find Contacts search box type **%@nysenate.gov** (This will narrow down your search to help find staff records.)
2. Press **Enter**.
3. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
4. After selecting the desired records, click **Actions**, then click **Group - Add Contacts**.
5. Across from Select Group, click the down arrow and choose **Email Seeds**.
6. Click **Add to Group**.
7. A message will appear at the top of the screen to let you know how many contacts were added to the Group.

Working with Smart Groups

Creating a Smart Group

1. Search the database to find the **desired common** records.

Note: The Find Anything, Find Cases, and Find Activities search options will not allow you to create a group from your search results.

2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)

3. Click **Actions**, then click **Group – create smart group.**

4. Type a **name** for the Smart Group. (**Tip**: When you create a new Smart Group, it will appear in the listings with the Static Groups. Therefore, when viewing the list of groups, there is no way to determine what type of group it is. When entering the name of a Smart Group you might want to put a notation of Smart Group within the name.)

5. If desired, enter in a description.

6. If planning to send a mass email to this group **check** the **email list** box.

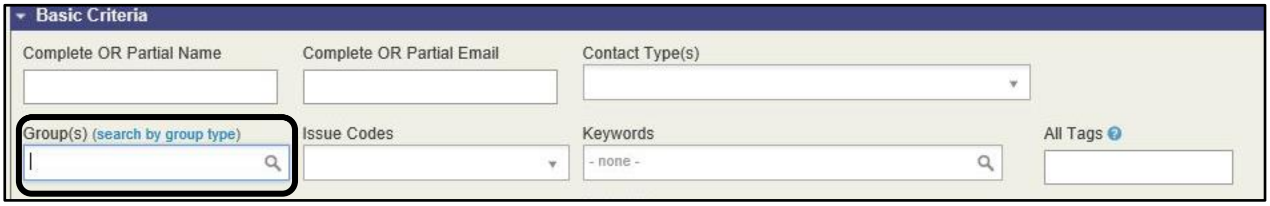
7. Click **Save Smart Group**.

8. A message will display in the message area that the Smart Group has been created. Click **Done**.

Viewing a List of Contacts in a Smart Group

1. From the main navigation area, click **Advanced Search**.

2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



3. Click the **desired Group**.

4. Click **Search** to display a list of names.

Editing a Smart Group Name, Description or Email List status

1. From the main navigation area, click **Manage**, and then click **Manage Groups**.

2. Click on **More**, across from the Group that you would like to edit.

3. When you click on **More**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; click on **Settings**.

4. Make **desired changes**. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

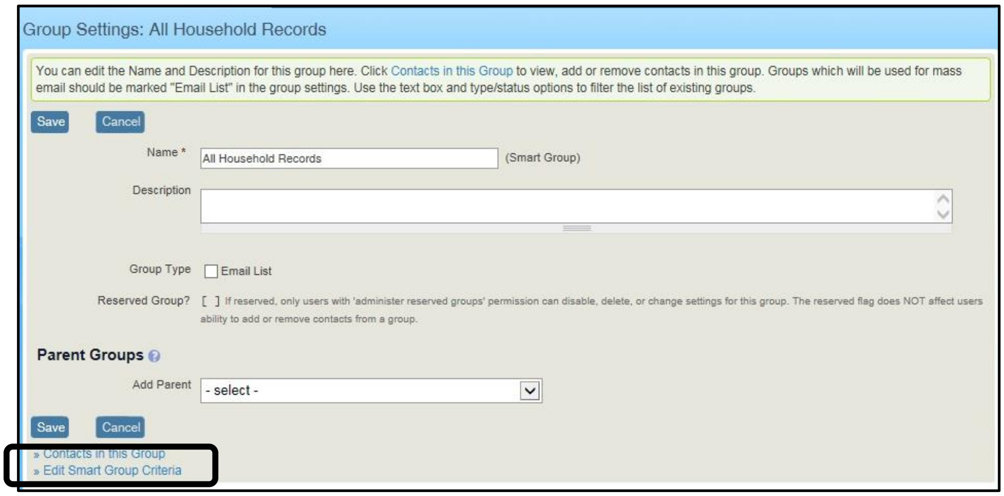
Editing Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.

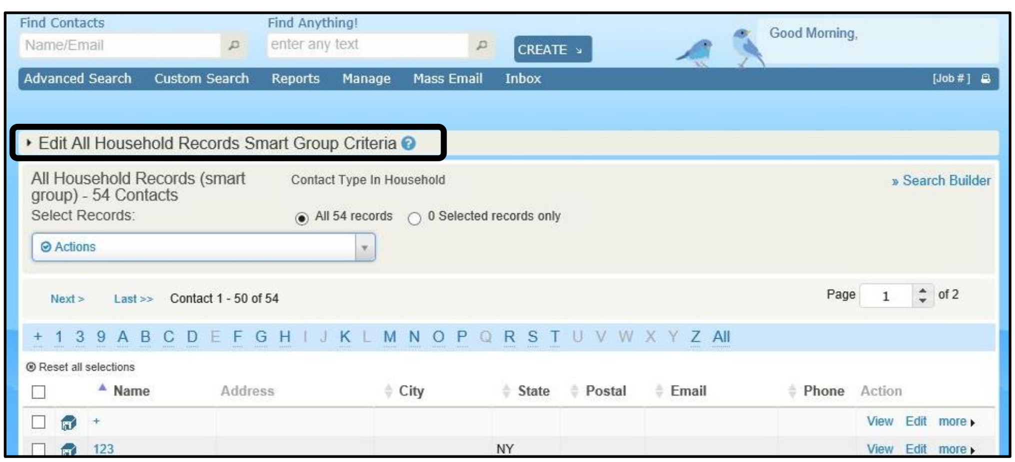
2. Click on the **More** link, across from the Smart Group that you would like to edit.

3. When you click on the **More** link, a menu will appear that gives you three options: Settings, Disable, or Delete; click on **Settings**.

4. On the Group Edit Screen, click on **Edit Smart Group Criteria** in the bottom left of that box

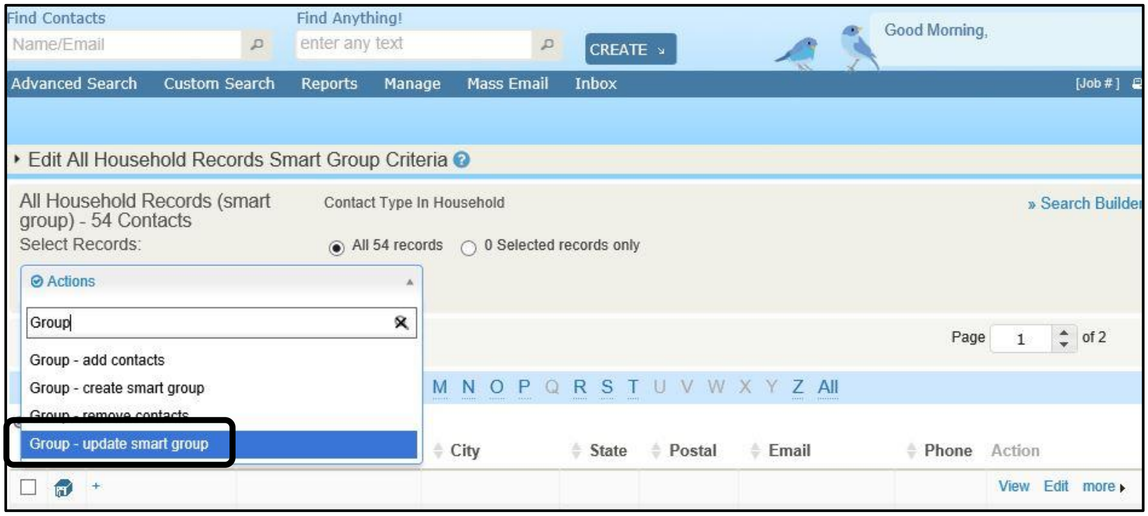


5. On the next screen, you will see the Advanced Search results for the Smart Group that you are viewing. Click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

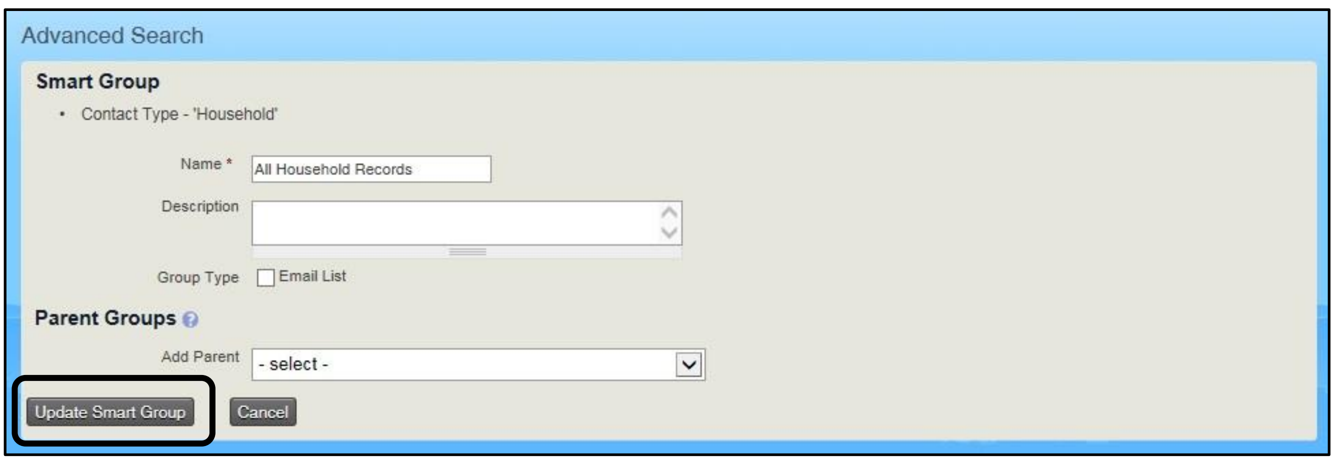


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, click in the Actions box and in the white box that appears, type **Group**. In the filtered list select **Group - update smart group**.



8. On the Smart Group page, select **Update Smart Group** button in the bottom corner of the screen.

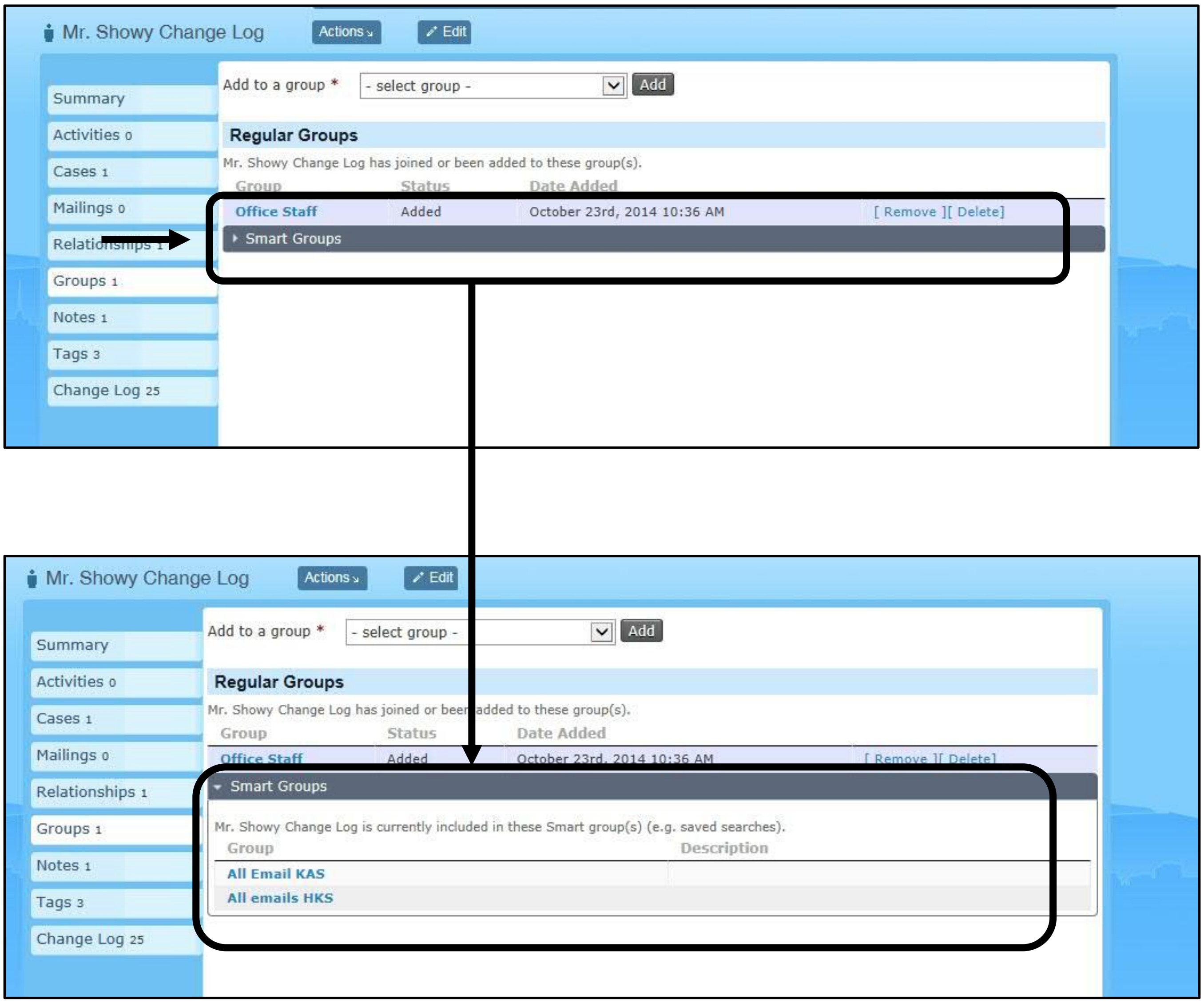


9. You will see the button change to Processing, and then a message popup box will tell you the Smart Group has been saved. On the next page, click **Done**.

Note: This will bring you back to the Edit Advanced Search criteria page. You can click Dashboard to clear this page.

Wondering if a contact is in a specific Smart Group?

Go to the desired **Contact** record and click on the **Groups** tab. On the Groups screen, you will see an expandable panel titled **Smart Groups**. Expand this panel by clicking on the **triangle** to the left of Smart Groups. The panel will expand and show all Smart Groups that the contact currently meets.



What are Activities and Cases?

One of the primary purposes of Bluebird is to track communication to and from constituents. This is done through **Activities** and **Cases**.

Activities track simple, one-time communications. For example, if a constituent calls and asks, "What is the Senator's web address," this is usually something that can quickly be answered over the phone with the constituent. This action may be recorded within Bluebird as a Phone Call (received) activity with a brief description of how the staff person resolved the issue and followed-up (if necessary).

Cases are available as a way of grouping activities that pertain to the same topic that the constituent has contacted the office about. For example, if someone calls the office regarding storm damage you can open up a case for them and then record multiple activities. This way, all of your steps in solving this issue will be grouped together in one area. (If you use Activities instead of Cases, related issues will not be grouped together within the Activities Tab, but rather listed in a chronological order based on date of entry, which would make it harder to see the progress with a certain issue.)

> **Note**: If you create an Activity and it starts to become more involved, you can create a Case and then move the Activity information into the Case. To see instructions on how to do this, go to section titled *Changing an Activity to a Case (File on Case)*.

Activities

Understanding Activities

Activities are records of communication between constituents and staff. Activities are created from the contact record's Activity tab or from the Create menu.

In addition to searching for activity records using Advanced Search, you can also use the **Find Activities** search located under Custom Search.

Visit a record's Activities tab to review a history of past communication. From this tab, you can delete or edit existing activities. For example, you may return to a scheduled activity record to mark it complete and add some final notes.

Adding an Activity to a Contact Record

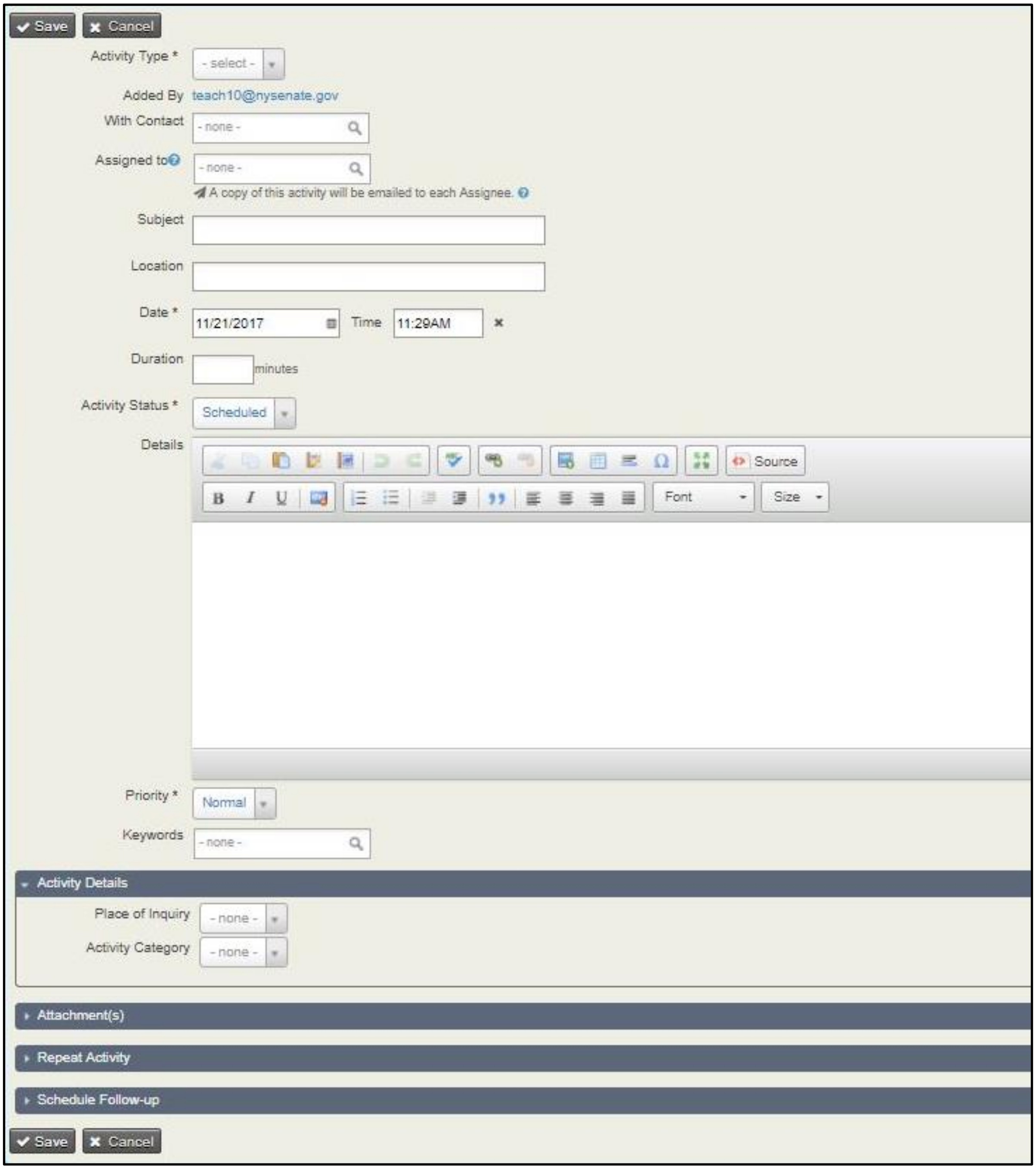
1. Search the database to find the desired **Contact record.**
2. From the contact record view screen, click on the **Activities tab**.
3. Click the **blue Actions** button next to the Edit button at the top of the record.
4. Click on desired **Activity Type** in the left column under Record Activity.
5. The corresponding activity page will display. Fill in the **desired fields**. *(For more details, see the subsection in this manual titled **Parts of an Activity Screen** located within the Activities section. Refer to the table of contents for page number.)*
6. When finished recording the activity, click **Save**.

Bulk Adding an Activity to Multiple Contact Records

Activities may be added to multiple contact records at the same time.

1. First **search** for the desired contact records.
2. Select desired contact records.
3. Click the **Actions** dropdown menu and select **Add activity.**
4. Select an **activity type** and fill in desired **fields**. When done, click **Save**. This will refresh the screen and bring you to the Find Activities search screen.

Parts of an Activity Screen



- **Activity Type:** this is the type of activity you selected; if you have made a mistake, you can change it from the drop down menu.
- **Added By:** will be prefilled with the name associated with the account currently logged in. (If the name is incorrect, make sure you are logged into Bluebird with the correct userid and Lotus Notes p password.)

- **With Contact:** section will be prefilled with the contact's name if you create an activity from the contact record screen; if you select New Activity from the Create menu then you will need to fill in this box yourself.

- **Assigned To**: You can choose to assign this activity to a staff person. A copy of the activity will be emailed to each assignee. As you type the staff person's name, wait for the list to populate and then select the **name**. The Assigned To field is pulled from an auto-complete field and is limited to contacts found in the Office Staff static group only.

> **Note**: As with all the auto-complete fields within Bluebird, you will need to type in **at least three letters** in the **Assigned to** box for the list to appear. Each office is responsible for adding the necessary staff members into the existing Office Staff group in their Bluebird database. See section titled **Adding a Staff Member to the Office Staff Group** in this manual for more information.

- **Subject**: A very brief description of this activity.

- **Location**: Used to designate the source or indicate where a meeting or event will take place.

- **Date**: A required field, used to record the date & time of the activity.

- **Duration**: Total time spent on this activity (in minutes).

- **Activity Status**: A required field, used to select the status of this activity. An activity with a **Scheduled** status works like a dated task and will appear on the activity dashlet. A scheduled status will turn red if the activity date is in the past. The **Completed** status is used to record past activities (i.e. a phone call that took place this morning) or a finished task.

- **Details**: Used for adding a more detailed description of the activities.

- **Priority**: A required field, used to assign an activity as having a Low, Normal, or Urgent priority.

- **Keywords:** You can add a Keyword to this Activity.

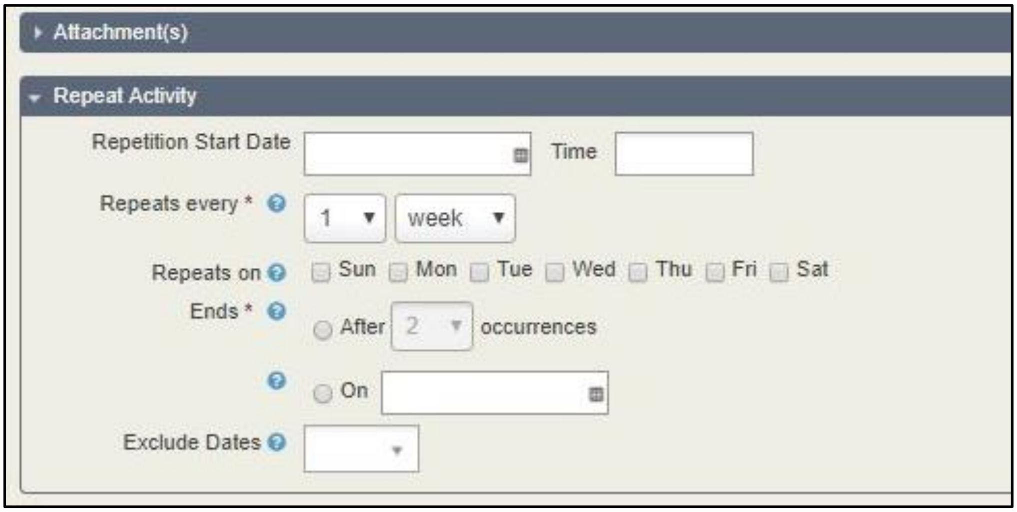
- **Activity Details:** includes Place of Inquiry and Activity Category.

    - **Place of Inquiry:** Used to designate where the Activity originated.

    - **Activity Category:** Used to classify the record by the nature and purpose of the communication (i.e. Legislative Position).

- **Attachment(s)**: You may attach up to five files to this Activity.

- **Repeat Activity**: this allows you to create duplicate activities for repeating times. For example if you have a repeating phone call every Friday from the same person regarding the same topic you can create one activity with all the information and then have it repeat once a week. However, all of the activities will be created at the same time; it does not appear once a week when it repeats. Therefore, if you have an activity that you want repeated 10 times once a week, when you save this activity you will see ten activities pop up with the term **Repeating** in bold next to the activity type. Next to repeating will be the number of times it will occur.



- **Schedule Follow-up**: Allows you to create a new activity from within an activity edit screen. However, you will receive limited options when choosing this feature. If you decide to do a follow-up activity, make sure to be detailed in the subject line so you will know which activity it refers to when looking at the activity tab of a record. Using the term "Follow-up" in the Subject is a good rule of thumb. You can also **assign** the Follow-up activity to a co-worker. Once saved, you will be able to **edit** the activity from the contact record's Activity tab where you will see additional options that are usually available for Activities.

Deleting an Activity

You should only delete an Activity if you made a mistake and added it to the wrong record.

1. Search the database to find the desired **Contact record.**
2. From the contact record's view screen, click the **Activities** tab**.**
3. A list of Activities will display. Click **More** across from the desired choice.
4. Click **Delete** from the menu. Click **Delete again**. You will see a prompt when the deletion is complete.

Changing an Activity to a Case (File on Case)

If you created an Activity and it has become more involved, you can "move" it into a Case. You will need to create the Case first, see section titled **Creating a Case** in this manual for more information then follow the steps below.

1. Search the database for the **contact record** containing the activity you need to move.
2. From the contact record's view screen, click **Activities.**
3. A listing of Activities will display. Click **more** across from the Activity you want to move.
4. Click **File on Case** from the menu.
5. In the Select Case field, begin typing the **contact's last name**. A list of existing Cases will appear for this contact. Click the **desired case** from the list.
6. Use the With Contact(s) box if you want to attach this Activity to an additional contact record. Click in the box and begin typing the **last name** of the contact.
7. If desired, type a Subject.
8. When done click **OK**.

Cases

Understanding Cases

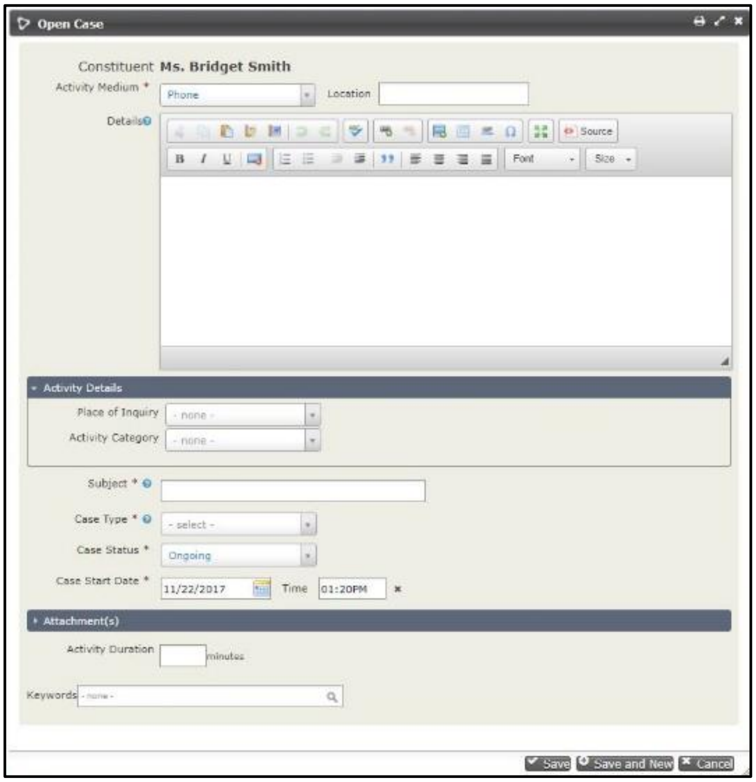
Cases are **collections of activities**. When constituents contact you and require assistance resolving an issue that may involve multiple steps and several pieces of communication, you will want to create a case record. Doing so keeps all of the related activities grouped together and organized.

Case records are created from the contact record's Cases tab, Actions Menu, or from the Create menu on the main navigation area.

Adding a Case to a Contact Record

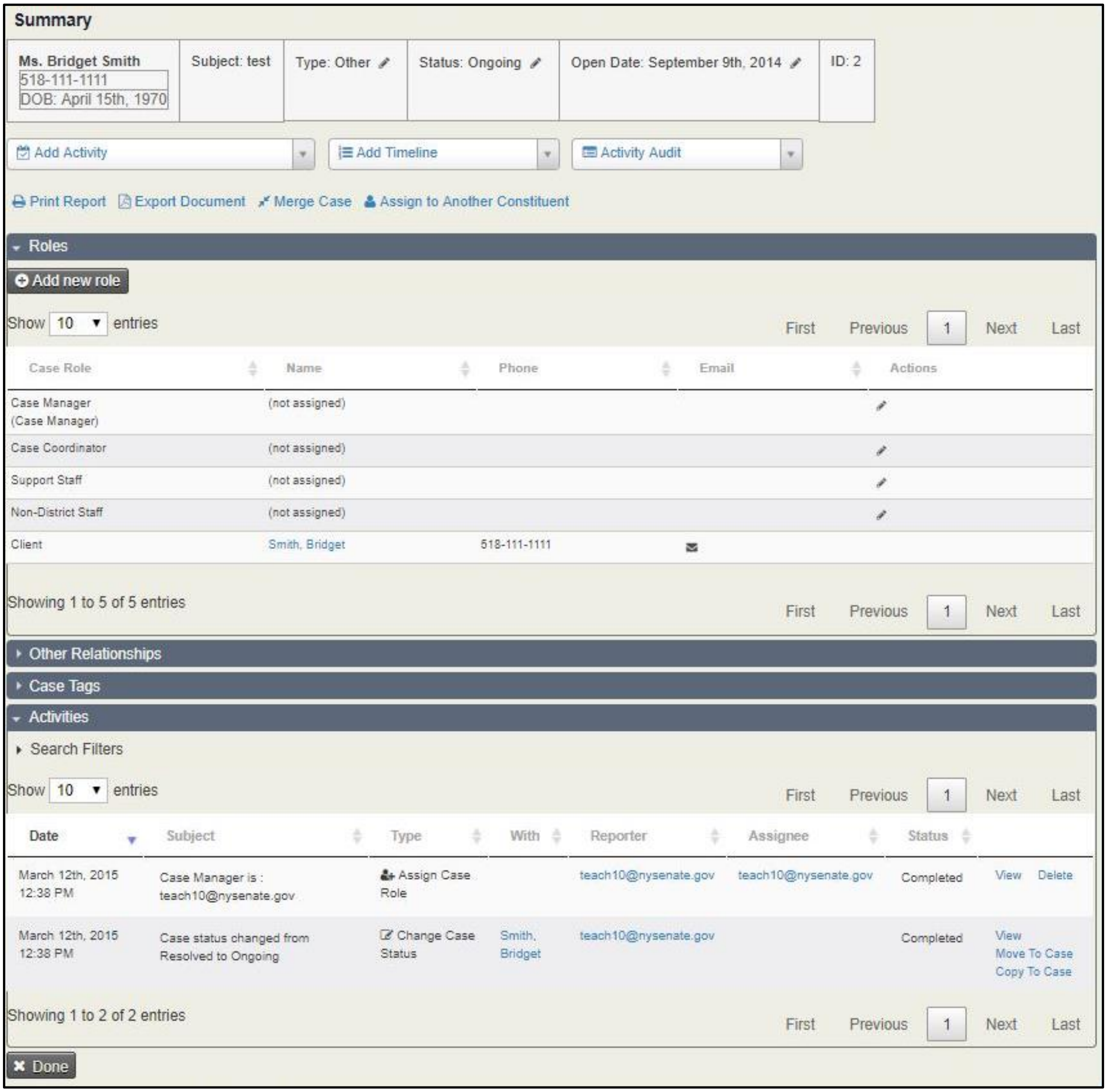
1. To create a case, search the database to find the **Contact record**.
2. From the contact record's screen, click **Actions**.
3. Click the **Add Case** option in the middle column.
4. The Open Case pop-up box will display. Fill in **desired fields**. *(For more details, see the subsection in this manual titled **Parts of a Case Screen** located within the Cases section. Refer to the table of contents for page number.)*
5. Click **Save,** or if you want to add another Case to this contact, click **Save and New**.
6. Once you have created a Case, the screen refreshes and you are looking at the Case tab of a contact record. To start adding information into the Case you have created click **Manage** across of the desired case.
7. Within the case summary screen add **desired information**. When done adding information you can click **Done** in the bottom left corner to return to the contact record's Cases tab.

Parts of the New Case Screen



- **Activity Medium**: Required field used to identify how the office was contacted.
- **Location**: This field can be used to further designate the source or indicate where the Case information was obtained.
- **Details**: Used to record notes relevant to the Case problem.
- **Activity Details:** This panel's information is stored in the first activity within the Case.
- **Subject**: A required field used to capture a brief description of the Case.
- **Case Type**: A required field used to indicate the purpose of the case.
- **Case Status:** A required field used to indicate the status of the Case.
- **Case Start Date:** A required field used to indicate the date that the Case was started.
- **Attachment(s)**: You may attach up to five files.
- **Duration**: Total time spent on the Case (in minutes).
- **Keywords:** You can add a Keyword to a Case to help track the issue.

Parts of the Case Summary Page



- **Summary boxes**: Displays important contact information.
- **Add Activity** dropdown menu: Add an activity for the case.
- **Print Report** link: Allows you to print out a report of the Case and all associated activities.
- **Export Document** link: Opens the Print/Merge Document activity type.

- **Merge Cases** link: Allows you to merge two cases together.
- **Assign to Another Constituent**: Allows you to move a case to a different record if there was a mistake, for example, if you accidentally added the case to a spouse's record or a family member's record this allows you to move it without having to recreate and re-type the case information.
- **Roles**: Senate staff may assign specific roles within a Case, representing the assignee's responsibilities. For example, you might have one person responsible for Case Management and a second person assigned as a supporting backup role. Case roles are individuals *directly involved* in case resolution.
- **Other Relationships**: Case Relationships and Case Resources are used to track contacts who are indirectly involved in case resolution. Case relationships will pre-populate the contacts existing relationships (i.e. employer or spouse). Case Resources is populated from the Case Resources group and serves as a contact directory list.
- **Case Tags**: Cases may be classified using Keyword text.
- **Case Activities**: The heart of Case Management is the ability to record a series of Activities to and from the constituent as case resolution is pursued. In this way, you maintain a running history of steps taken toward resolution. This section works with the New Activity dropdown menu found at the top of this page.

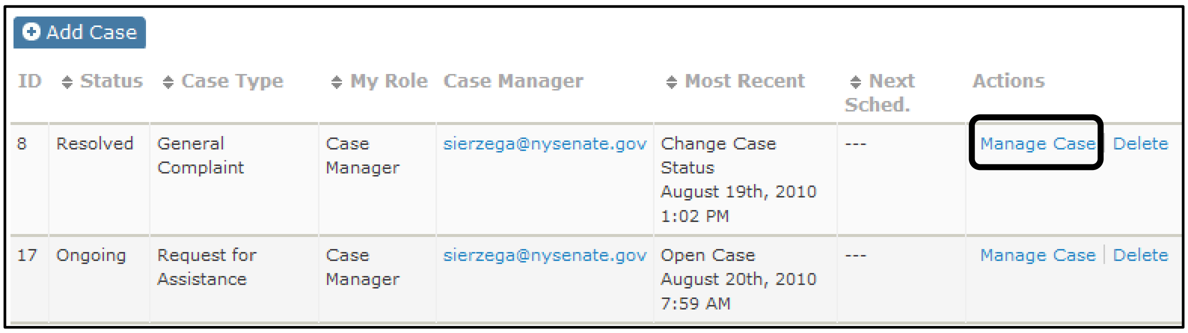
Editing Case Role

When a staff person creates a Case, the Case Manager role will automatically be assigned to them. The client is the name of the contact record you are working with. The other Case Roles will have "not assigned" listed. The names populated in the Case Roles are pulled from the Office Staff static group. Therefore, if someone is not in the list of possible choices they need to be added to the Office Staff static group. *(See section titled* ***Adding a Staff Member to the Office Staff Group****).* Complete the following steps to edit a Role:

1. Search the database to find the desired **Contact record**.

2. From the contact record's view screen, click the **Cases** tab.

3. Across from the desired Case, click **Manage Cases**.



Add Case

ID	Status	Case Type	My Role	Case Manager	Most Recent	Next Sched.	Actions
8	Resolved	General Complaint	Case Manager	sierzega@nysenate.gov	Change Case Status August 19th, 2010 1:02 PM	---	Manage Case Delete
17	Ongoing	Request for Assistance	Case Manager	sierzega@nysenate.gov	Open Case August 20th, 2010 7:59 AM	---	Manage Case | Delete

4. Open the Roles panel if it is not already displayed. Under Case Role, click the **pencil icon** across from the role you want to change under the Actions column.

Add new role

Case Role	Name	Phone	Email	Actions
Case Manager (Case Manager)	sierzega@nysenate.gov			
Case Coordinator	(not assigned)			
Support Staff	(not assigned)			

5. Click in the box and type the **name or email address** of the office staff you want to assign to the case. Click on their name from the list and click **Save**.

6. The screen will refresh back to the Case Summary screen. When finished working with the Case Summary form, click **Done.**

Note: If you need to add a new Case Role, click the **Add new role** button, select **Relationship type** and type **name or email address** of desired contact. Click **OK**.

Managing Cases

New Case Activity

1. Search the database to find the desired **Contact record**.
2. From the contact records view screen, click on the **Cases tab.**
3. Across from the desired Case, click the **Manage link**.
4. Click the **add activity** and select the **desired activity**.
5. Add **desired information** to the Case Activity form:
   - **Activity Type**: This field will automatically be filled in with whatever option you chose from the dropdown list.
   - **Reported By:** This is a required field, and it will be automatically filled in with the logged-in user's email.
   - **Assigned To**: You can choose to assign this activity to a staff person. A copy of the activity will be emailed to each assignee. As you type the staff person's name, wait for the list to populate and then select the **name** from there. The Assigned to field is pulled from an auto-complete field and is limited to contacts found in the Office Staff static group only. (**Note**: as with all the auto-complete fields within Bluebird, you will need to type in at least three letters in the box for the list to appear.) This group has already been created for the Senator's bluebird instance, but each office is responsible for adding the necessary staff members into that group. (See section titled **Adding a Staff Member to the Office Staff Group**)
   - **Subject**: A very brief description of this activity.
   - **Medium**: This is a required field, used to identify how the individual contacted you (i.e. In Person).
   - **Location**: Used to designate the source or indicate where a meeting or event will take place.
   - **Date**: A required field, used to record the date & time of the activity.
   - **Duration**: Total time spent on this activity (in minutes).
   - **Status**: A required field, used to select the status of this activity. An activity with a **Scheduled** status works like a dated task and will appear on the activity

dashlet. A scheduled status will turn red if the activity date is in the past. The **Completed** status is used to record past activities (i.e. a phone call that took place this morning) or a finished task.

- **Priority**: A required field, used to assign an activity as having a Low, Normal, or Urgent priority.
- **Details**: Used for adding a more detailed description of the activities.
- **Activity Details**: *Place of Inquiry* and *Activity Category* help to further categorize the contact record and the case and makes it easier to search for the case later on.
- **Attachment(s)**: You may attach up to 3 files to this Activity.
- **Send a Copy:** Email a complete copy of this activity record to other people involved with the case.
- **Schedule Follow-up**: Allows a user to create a new activity from within an activity edit screen. However, the user will receive limited options when choosing this feature. They will only be able to fill in the Activity Type, number of days, in which the follow-up activity will take place, and the subject line. If you decide to do a follow-up activity, make sure to be detailed in the subject line so you will know which activity it was that you created when looking at the activity tab, using the term "Follow-up" in the Subject is a good rule of thumb. Otherwise, you make have multiple Phone Call (outgoing) activity types with generic subject lines and will not be able to tell the difference. Once saved, from the contact record's Activity tab, you will be able to edit the activity and then you will see the additional options that are usually available for Activities, and from here, you may also adjust the Subject line as necessary.

6. Click **Save**. When finished working with the Case Summary form, click **Done**.

Editing a Case Activity

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Cases tab.**
3. Across from the desired Case, click **Manage Cases**.
4. Under Case Activity, click **Edit** across from the Activity you want to modify.
5. At the next page, make the **necessary changes** to the form and then click **Save**.
6. When finished working with the Case Summary form, click **Done**.

Deleting a Case Activity

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Cases tab.**
3. Across from the desired Case, click the **Manage link**.
4. Under Case Activity, click **Delete** across from the Activity you want to remove.
5. Click **Delete** again to remove this activity from the listing.
6. When finished working with the Case Summary form, click **Done**.

Deleting a Case

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Cases tab.**
3. Across from the desired Case, click **Delete**.
4. Click **Delete** again.

Moving or Copying a Case Activity to another Case

You can use this option to either move or copy an Activity to another Case. This would be used if you added the Case Activity to the wrong Case (move) or if you have multiple contacts with the same Case and you want to log the same Activity into each of their records (copy).

1. Search the database to find the desired **Contact record**.
2. From the contact record view screen, click on the **Cases tab.**
3. Across from the desired Case, click the **Manage link**.
4. Under Case Activity, click **Move to Case** or **Copy to Case** across from the Activity you want to modify. (Move will move the Activity to another Case. Copy will keep the original Activity in this record and add a copy to another Case.)
5. In the Select Case field, begin typing the **contact's last name** and then select from the list.
6. If desired, use the With Contact(s) box to attach the case to an additional contact record by clicking in the box and typing the **last name** of the contact.
7. If desired, type a Subject.
8. When done click **OK**.

Searching for a Case by Type

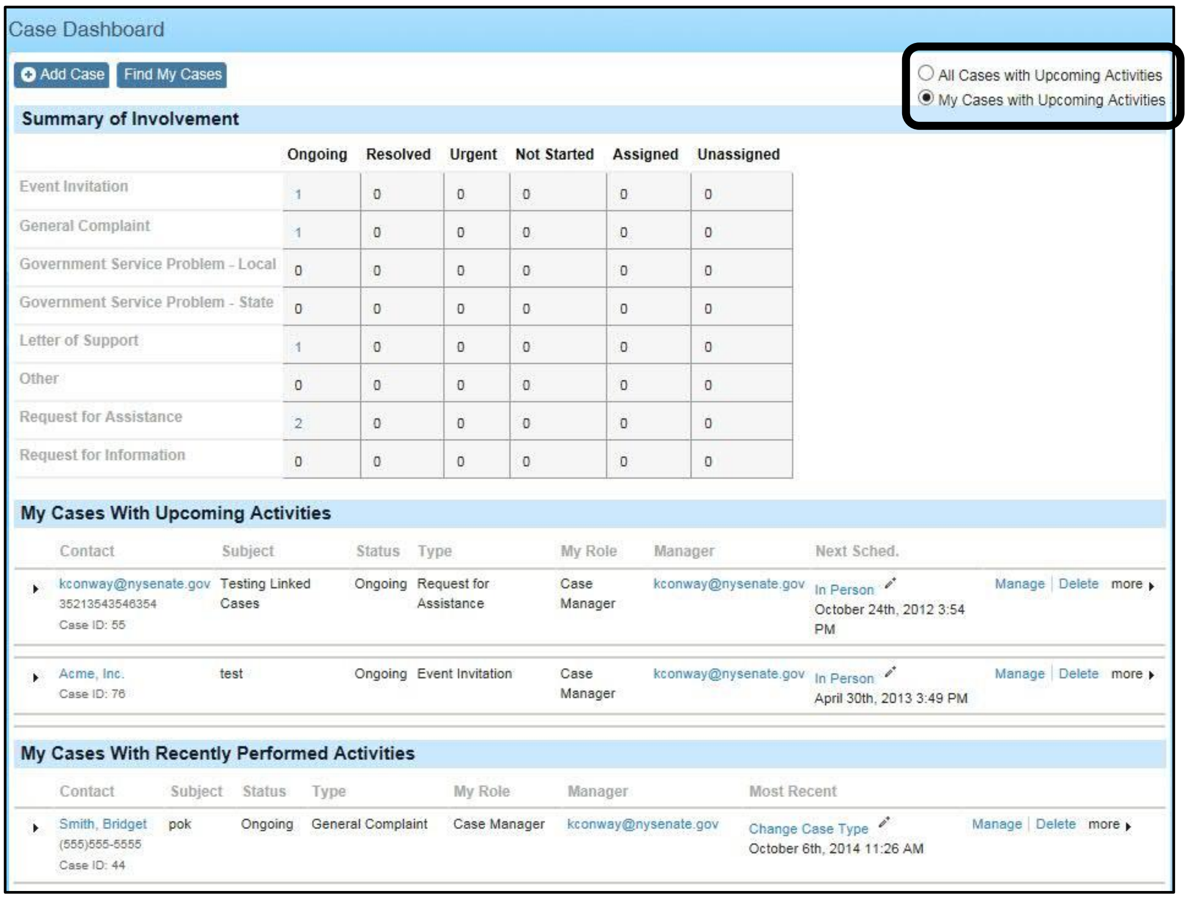
1. From the main navigation area, click on the **Custom Search menu.**
2. Click **Find Cases**.
3. Select the **desired search option(s)**.
4. Click **Search**.

> **Note**: You will only be able to delete cases or export cases from this search result screen.

Understanding the Case Dashboard

From the Case Dashboard you can see **All Cases with Upcoming Activities** within the database or **My Cases with Upcoming Activities**. You can toggle back and forth between these options by selecting the appropriate radio button at the top of the screen. You can also see counts for various casework in the chart.

Click on the **Manage** menu then click on **Case Dashboard** to get to the Case Dashboard.



Case Reports

There are three options for Case Reports in Bluebird:

- Case Summary Reports
- Case Time Spent Reports
- Contact Demographics Reports
- Case Detail Report

Case Summary Report

This report provides a summary of cases and their duration by date range, status, staff member and/or case role.

1. From the main navigation area, click on the **Reports menu**, and then click on **Create Reports from Templates**.
2. On the next screen, click on **Case Summary Report** under Case Report Templates.
3. Choose your display columns, date range, status, staff member, and staff relationship.
4. Click **Preview Report**.

Case Time Spent Report

This type of report aggregates time spent on case and/or non-case activities by activity type and contact.

1. From the main navigation area, click on the **Reports menu**, and then click on **Create Reports from Templates**.
2. On the next screen, click on **Case Time Spent Report** under Case Report Templates.
3. Select your display columns, group by columns, and set filters then click on Preview Report.

Contact Demographic Report

Demographic breakdown for case clients (and/or non-case contacts) in your database. Includes custom contact fields.

1. From the main navigation area, click on the **Reports menu**, and then click on **Create Reports from Templates**.
2. On the next screen, click on **Contact Demographic Report** under Case Report Templates.
3. Select the display columns and set filters then click on Preview Report.

Case Detail Report

1. From the main navigation area, click on the **Reports menu**, and then click on **Create Reports from Templates**.
2. On the next screen, click on **Case Detail Report** under Case Report Templates.
3. Select the display columns and set filters then click on Preview Report.

Reports

The Reports menu is accessed through the main navigation area.

Within the Reports menu, there are two main tools:

Report **Templates**

and

Report **Instances**

- A **Report Template** *defines the features* of a report. This includes what fields are available to the report, options for grouping and filtering, display choices, and any other options available.

- A **Report Instance** selects and saves *specific criteria and options* you wish to view. For example, you may want to view a constituent summary report displaying all contacts in Group A. Later, you may create a second instance of the constituent summary report displaying all contacts in Group A and Group B.

> **Note**: A template will be reused many times as different criteria and display options are selected to meet specific needs. After generating a report, you may print it or export as a .csv file.

Creating a New Report Instance

1. From the main navigation area, click on the **Reports menu** and then click **Create Reports from Templates**.

2. Click the **report template name** that you wish to use (i.e. Constituent Report Summary).

3. There are three buttons at the top of the screen with choices:

   - **Columns**: this allows you to choose the columns that are displayed on the results screen of the report

   - **Sorting**: allows you to choose how the results are shown (i.e. alphabetically by ascending order)

   - **Filters**: contains all of the filter options you have within the report you chose (i.e. only show all of the constituent cases I have opened up)

   Choose **the desired criteria** and **options** and then click **View Results** at the bottom of the screen.

4. If there are desired changes, click on the **buttons** along the top to adjust. There will be three additional buttons:

   - **Titles and Format**: allows you to name the Report and provide a description

   - **Email Delivery**: allows you to send an email report, you need to contact your OSR to let them know the name of the report and the frequency (daily, weekly) you want the report to be sent. If you do not inform STS, this option will not work properly because a setting needs to be activated by a STS programmer.

   - **Access**: allows you to select options for viewing the Report

     i. **Include Report in Navigation Menu?** By default, all report instances are automatically included in the Reports Listing page but checking this box also adds the report to the Reports menu in the Main Navigation Area.

     ii. **Add to my Reports?** By checking the box, you can have the report appear in the My Reports section of the reports listing page and will only be visible to you.

     iii. **Available for Dashboard?** Allows you to turn a report into a dashlet so it can be added to the Dashboard. Once a report has been created as a dashlet, it will become available to any user throughout the senate district. The user will need to reconfigure their Dashboard to add the report dashlet.

5. When finished, click **Refresh results**. This will update the results screen with any additional changes you have made.

6. Complete one of the following:

    - Click **Actions** to Name, Save, Print, Export, or Delete the Report
    - Click **Add Contacts to Group** box to add the Report Result contacts to a Group
    - Click **Existing report(s) from this template** link to see other Reports using the same template
    - Click **Dashboard** to get out of the Reports screen.

Note: To view all existing saved reports, click on the **Reports menu** from the main navigation area and then click **Report Listings**. From this page, you have the ability to delete any reports the office no longer needs.

Exporting Records

You can export records for various reasons. For instance, you might want to create a CSV file, which you can work with in Microsoft Excel, or you may want to use the exported list to create a mail merge within Microsoft Word.

When exporting lists, you have several options of selecting the fields that you want to export:

- **Export PRIMARY fields**: Provides the most commonly used data values. This includes primary address information, preferred phone, and email. Select this option and click Continue to immediately generate and save the export file. *(Note: this option provides about 65 columns in an excel document.)*
- **Select fields for export**: Allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a field mapping so you can use it again later. There are three types of field mappings that are already created for each office: **Standard Export**, **Basic Export**, and **Email List Export**.

Export Using the Export Primary Fields Option

1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
2. Click **Actions** and then click **Export Contacts.**
3. From the Selected Fields box select **Export PRIMARY fields**.

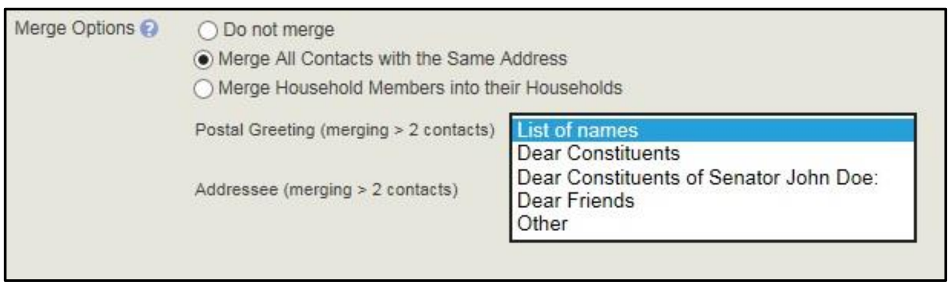
4. If desired, select any additional export options.

Merge Options

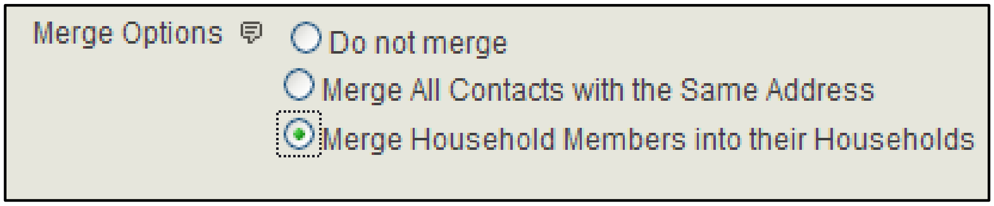
- *Do not Merge:* Use this option to avoid merging records when exporting.

- *Merge Contacts with the Same Address:* This option will combine any records having the same address (street address, city, postal code) into a single record. If a household record already exists in which multiple individuals share an address, the household will be exported as the combined record. If no household record exists, the records will be combined and the Addressee field will list the contact names, comma-separated.

  Note: If you select this option, you will be given the choice of how you want the Postal Greeting and Addressee fields to appear in the mailing.



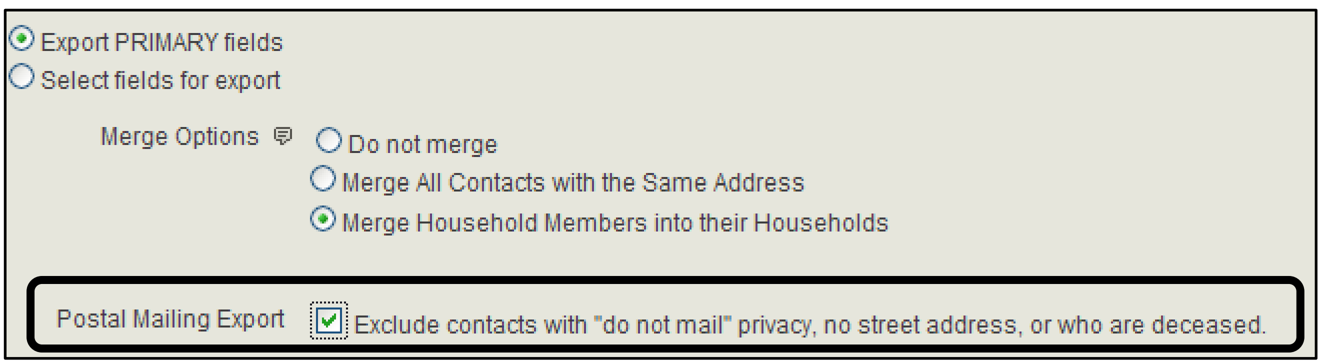
- *Merge Household Members in their Households:* This option will export the household record for any contacts sharing a household address. Bluebird addresses the letters with whatever Postal Greeting option was selected in the Household record.



Note: To view Household records in your Bluebird database, go to **Advanced Search** and in the Basic Criteria section, click the **Contact Types** drop down menu to select **Households**. Click **Search** to view the results.

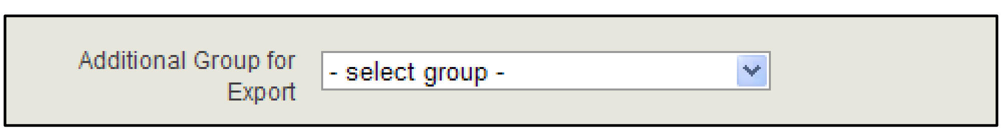
Postal Mailing Exclusions – IMPORTANT

In order to exclude contact records that have the "do not mail" privacy setting selected, have no street address data in their record, or who are marked as deceased be sure to check off the **Postal Mailing Export** option on the export screen.



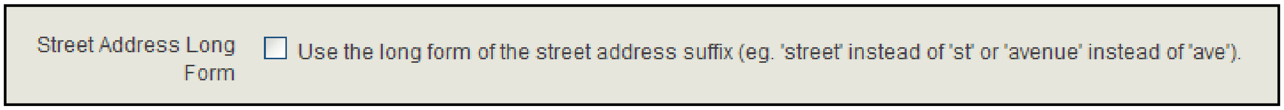
Additional Group for Export

This option is available for you to select an additional group to mail to such as your Mailing Seeds group. Click the **drop down** and select the **desired group**.



Street Address Long Form

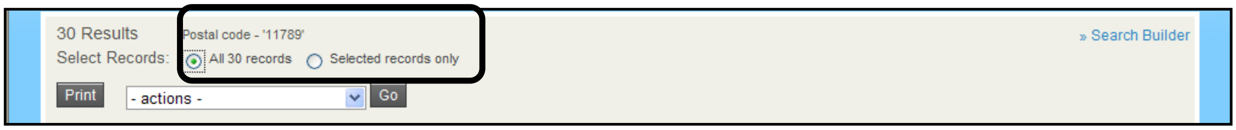
Select this option to display addresses in long form (i.e. Street instead of St. or Avenue instead of Ave.)



5. Click **Export**. At the File Download box, click **Save As** to save the file or **Open** to open the CSV file.
6. If you clicked **Save As**. The Save As dialog box will appear. Select the desired location and name the file. (Do not change the Save as Type in this window.)
7. Click **Save**.
8. At the download complete dialog box either click **Open** to open the saved file or click **on the X** to close out of this box and continue working in Bluebird.
9. After the Download Complete dialog box is closed, you will still be on the export screen within Bluebird. Click **Back** to return to your search results. From here, you can Record a Letter (outgoing) Activity for all of these contacts. (See steps in this manual titled **Bulk Adding an Activity to Multiple Contact Records.**) You can also **Tag** these records if necessary from the actions drop down menu.
10. If you are done working with this list, click the **Dashboard** button.

Export Using the Select Fields for Export Option

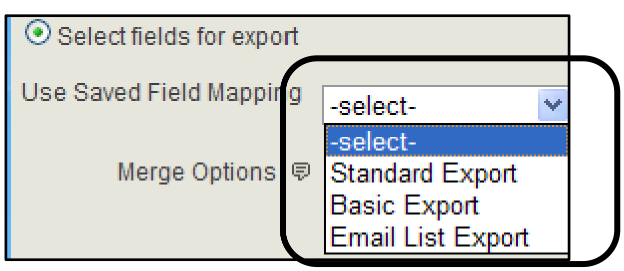
1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)



2. After selecting the records, click the **down arrow** across from actions and then click **Export Contacts.** Click **Go**.

3. From the Selected Fields box, choose **Select fields for export**.

4. Once you click the Select Fields for export option, the Use Saved Field Mapping box becomes available. Click the **drop down arrow** and then click the **desired choice**.



Standard Export: This option will provide the primary fields of Internal Contact ID, the Contact Type, Display Name, First Name, Middle Name, Last Name, Suffix, Job Title, Current Employer, Birth Date, Street Address, Mailing Address, City, State, Postal Code, Postal Code Suffix, Addressee, Postal Greeting, District Information (SD, AD, ED, and CD), Website, Phone, and Email for all Individuals, Organizations, and Households in your search results.

Basic Export: This option will provide the primary fields of Internal Contact ID, Contact Type, Display Name, First Name, Middle Name, Last Name, Job Title, Current Employer, Building, Street Address, Mailing Address, City, State, Postal Code, Postal Code Suffix, Addressee, and Postal Greeting of all Individuals, Organizations, and Households in your search results.

Email List Export: This option will provide the primary fields for Internal Contact ID, First Name, Last Name, Display Name, Email Greeting, and Email Address for all Individuals and Households in your search results.

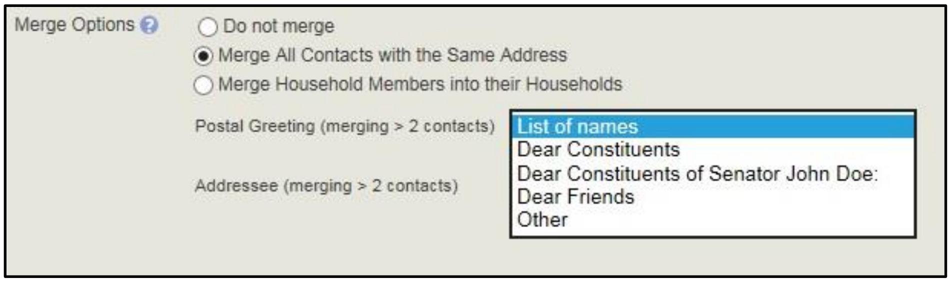
5. If desired, select any additional export options.

Merge Options

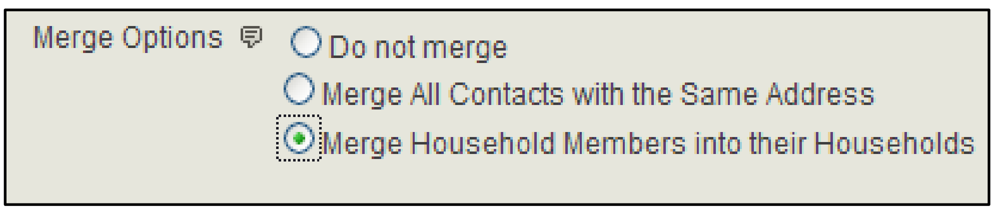
- *Do not Merge:* Use this option to avoid merging records when exporting.

- *Merge Contacts with the Same Address:* This option will combine any records having the same address (street address, city, postal code) into a single record. If a household record already exists in which multiple individuals share an address, the household will be exported as the combined record. If no household record exists, the records will be combined and the Addressee field will list the contact names, comma-separated.

Note: If you select this option, you will be given the choice of how you want the Postal Greeting and Addressee fields to appear in the mailing.



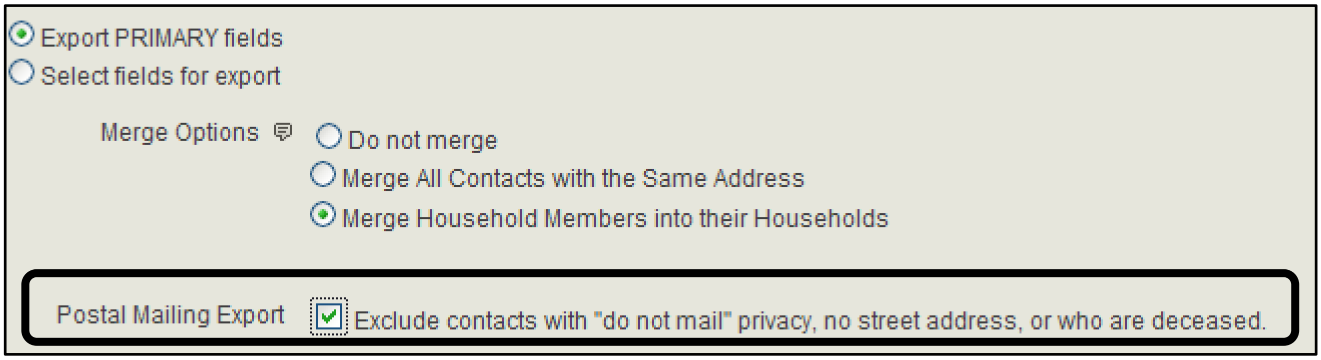
- *Merge Household Members in their Households:* This option will export the household record for any contacts sharing a household address. Bluebird addresses the letters with whatever Postal Greeting option was selected in the Household record.



> **Note**: To view Household records in your Bluebird database, go to **Advanced Search** and in the Basic Criteria section, click the **Contact Types** drop down menu to select **Households**. Click **Search** to view the results.

Postal Mailing Exclusions – IMPORTANT

In order to exclude contact records that have the “do not mail” privacy setting selected, have no street address data in their record, or who are marked as deceased be sure to check off the **Postal Mailing Export** option on the export screen.

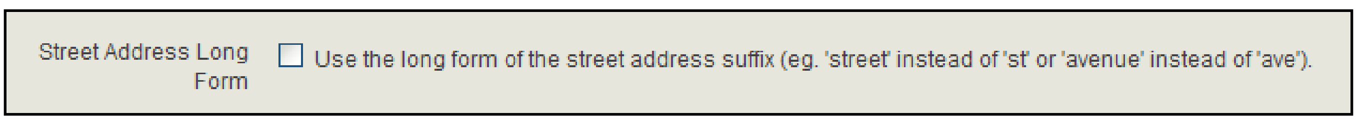


Additional Group for Export

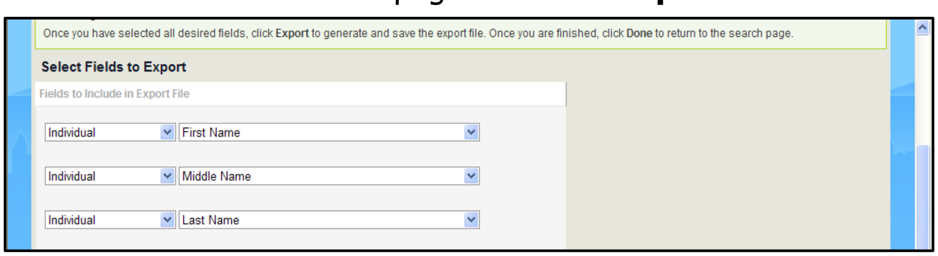
This option is available for you to select an additional group to mail to such as your Mailing Seeds group. Click the **drop down** and select the **desired group**.

Street Address Long Form

Select this option to display addresses in long form (i.e. Street instead of St.)



6. Click **Continue**. The **Select Fields to Export** page will appear with the preset fields of whichever Saved Field mapping you selected. You can either adjust these fields or scroll down to the bottom of the page then click **Export**.



7. Click **Export**. At the File Download box, click **Save As** to save the file or **Open** to open the CSV file.

8. If you clicked **Save As**. The Save As dialog box will appear. Select the desired location and name the file. (Do not change the Save as Type in this window.)

9. Click **Save**.

10. At the download complete dialog box, either click **Open** to open the saved file or click **on the X** to close out of this box and continue working in Bluebird.

11. After the Download Complete dialog box is closed, you will still be on the Select Fields to Export screen within Bluebird. Click **Back** to return to your search results. From here, you can Record a Letter (outgoing) Activity for all of these contacts. (See steps in this manual titled **Bulk Adding an Activity to Multiple Contact Records.**) You can also **Tag** these records if necessary from the actions drop down menu.

12. If you are done working with this list, click the **Dashboard** button.

Record Locking

When a user edits a record Bluebird is aware that it is being edited and prevents two people from editing the same record at the same time. There are two screens within Bluebird that this can affect: editing a record and tagging a record.

Editing a Record

- User A opens an Edit screen of a record and does not click Save
- At the same time, user B opens, Edits, and Saves the same record before user A tries to save it
- When user A clicks Save, a notification will display giving the following options:
  - **Save Anyway:** the changes that user A put in will overwrite user B's changes
  - **Reload Page:** the page will refresh with user B's changes thus losing any changes user A made
  - **View Modified Contact in New Window:** a new browser window will open displaying user B's changed record; at this point user A can go to the Change Log tab to see what user B changed and then make changes to the record if necessary

Tagging a Record

When trying to add an Issue Code within the Tags tab of a contact record, the following steps show how this feature works:

- User A clicks on the Tags tab of a contact record but does not select an Issue Code

- User B clicks on the Tags tab of the same contact record and selects an Issue Code (Budget)

- User A then tries to select the same Issue Code (Budget) but receives an pop-up error message: unable to add tags

If this Error occurs, refresh the screen by pressing **F5** on the keyboard or clicking the **refresh button** within the browser, this will refresh the contact record and you will be on the Summary screen, click on the **Tags** tab to see the updated list of Tags.

Setting Permissions – Office Administrator Role

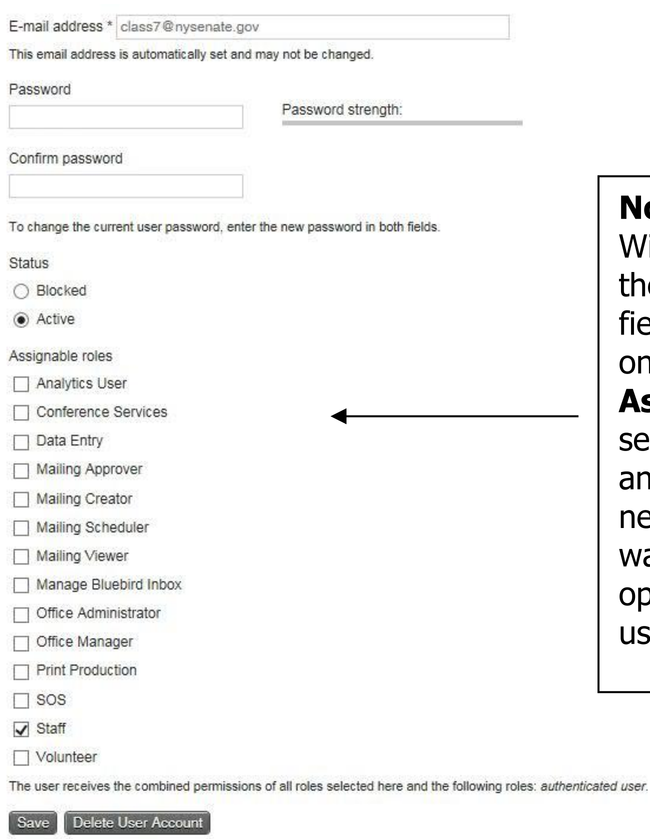
The Office Administrator role has the ability to manage permissions for staff members within their Senate District. These roles determine what the staff member can access, create, edit, or delete within Bluebird. (This role requires a memo or email from the Senator or Chief of Staff stating that a particular employee will need this type of access. For more information, see the section titled **Permissions and Roles within Bluebird**.)

Setting Permissions

1. From the main navigation area, click on the **Manage menu**, click **Manage Users**.
2. Click **Edit** across from the desired user name.

> **Note**: If a staff person is not listed, DO NOT add them. Instead, have them follow the steps in this manual titled "Establishing your Identity in Bluebird."

3. Under the Assignable Roles section, check off **one box** next to the **desired role** (Office Manager, Staff or Volunteer). **Note**: if a user already has a role, and you just need to edit it, please uncheck their current role first before checking their new role.


E-mail address * class7@nysenate.gov
This email address is automatically set and may not be changed.
Password
Password strength:
Confirm password
To change the current user password, enter the new password in both fields.
Status
- ( ) Blocked
- (•) Active

Assignable roles
- [ ] Analytics User
- [ ] Conference Services
- [ ] Data Entry
- [ ] Mailing Approver
- [ ] Mailing Creator
- [ ] Mailing Scheduler
- [ ] Mailing Viewer
- [ ] Manage Bluebird Inbox
- [ ] Office Administrator
- [ ] Office Manager
- [ ] Print Production
- [ ] SOS
- [x] Staff
- [ ] Volunteer

The user receives the combined permissions of all roles selected here and the following roles: *authenticated user*.
Save | Delete User Account

> **Note:**
> Within this page, there are many fields, but you should only change the **Assignable Roles** section. Changing any other options can negatively affect the way the system operates for this user.

4. Click **Save** at the bottom of the page

5. When done, click the **back to Bluebird** link in the upper right hand corner of the screen.