New York State Senate

BLUEBIRD

Introduction

Constituent Relationship Management Software

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 will be four main roles that office staff will be assigned:

- Volunteer: Add and view contacts and related records.
- Data Entry: Add, view, and edit contacts and related records.
- Office Staff: Data Entry permissions plus ability to trash contacts, delete related records, create groups, and work with cases.
- Office Manager: Office Staff permissions plus ability to manage tags, merge duplicate contacts, and access inbox polling.
- Office Administrator: Office Manager permissions plus ability to set permissions for the staff in the Senator's office and permanently delete records.

Accessing Bluebird

Account Information

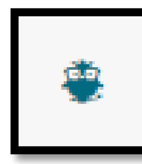
Before you receive access to Bluebird you must:

- Have a Senate 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 the Senate network.

- In a web browser go to **https://my.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.
- Click the **Bluebird Icon link**(top right-hand corner). You will only see this when you are signed into Mysenate.



- Enter your Senate **username** and **password** at the login screen.
- 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:

- 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.

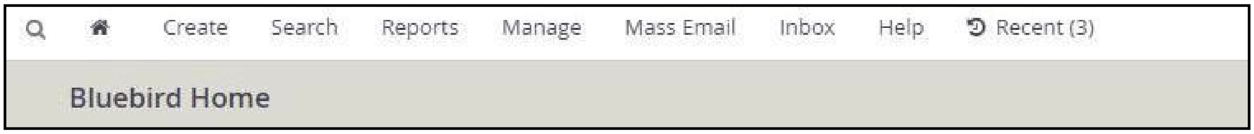
Personalizing Your Bluebird Record

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.

Quick Search: This box allows you to search for First Name, Last Name, Email, Phone, Street Address, City, and Postal Code.

Home Icon: this acts as a Home button and returns your screen to the Dashboard.

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

Search Menu: Bluebird offers many search options, which allows you to search for Contacts, Activities, 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: This menu is based on the permissions you have. The Office Administrator role will manage tags and users from this menu.

Help: This menu provides PDF versions of all of the Bluebird manuals. If you would like a printed copy of any of these manuals, call the Help Line at ext. 2011.

Recent Items Area: This area tracks recent activity. To return to an item that you were working with click Recent Items, then the item you were working on. This menu will hold the last ten recent items. Recent items at the bottom of the screen will hold the last five most recent items.

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.

Quick Search (magnifying glass)

- Click on the **magnifying glass** and select your desired search parameter. As you begin to type characters, a list of possible matches will appear.
- If the search item you are looking for appears in the list, you can **click on it** to open the corresponding record or you can press **enter** to display a detailed search results screen.

Note: 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**.

- You may use the percent symbol (**%**) as a **wildcard** for this search box. The wildcard may be used before, after, or in the middle, of search text. You may also use the wildcard as a way to see a list of the category you are searching. For example, if you want to see a list of all phone numbers in the database, select **Phone**, type in **%**, then **type Enter**. You can sort the results if needed.

- 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.

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 manually 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.

Individuals

Adding a New Individual Record

1. First search the database to make sure the person does not already exist.
2. Click **Create**, **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

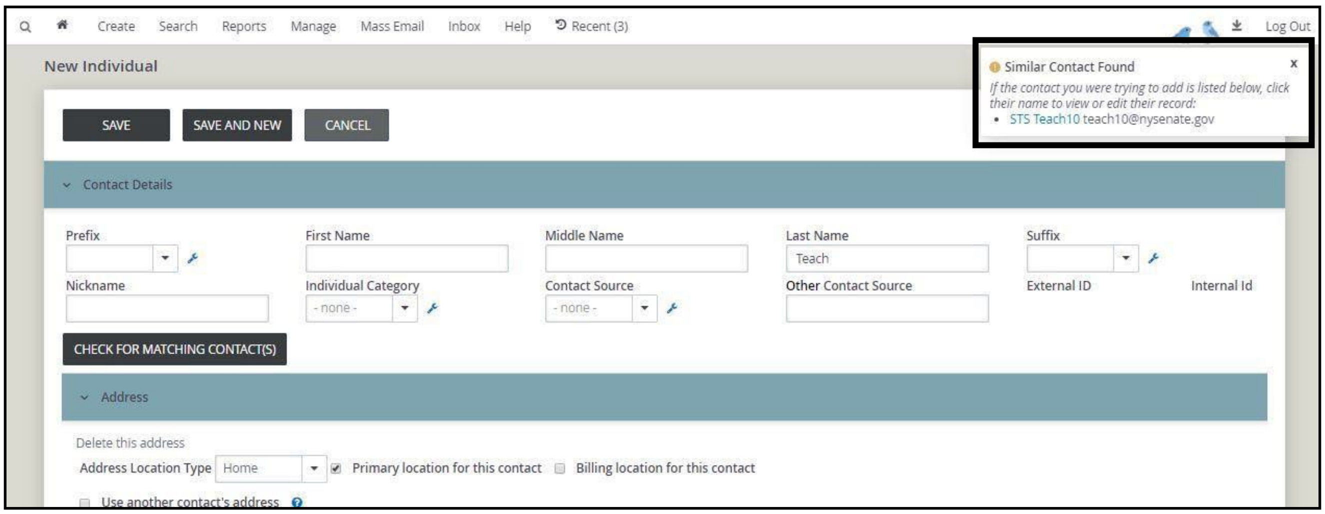
- **Contact Details**: General Information about the individual. An individual can have multiple addresses and/or phone numbers.
  - **Prefix Field**: To ensure that letters are addressed correctly be sure that the Prefix field is filled in. If you do not know the prefix, make sure to adjust the Postal Greeting and Addressee fields within the Communication Preferences of the record. Custom options are available.
  - **Free form text boxes**: The name fields and preferred pronouns boxes can be typed in however you'd 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 of 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 easily identify the preferred phone number, email address, or mailing address when there are multiple options to choose from.
- **Additional Constituent Information:** Additional information such as, are they interested in volunteering, are they an active constituent, friend of the Senator etc.
- **Attachments:** You can attach up to five documents to each contact record. There is a limit of 2MB per item. *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**
  - **Email Greeting**: Salutation for sending emails through the system (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 can 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 the office asking to no longer receive postal mailings).
  - **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 family members' names, pets, or facts.
- **Demographics:** This section contains gender options, ethnicity options, religion text field, 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:** a hierarchal tree to classify the individual's interests and areas of concern.
  - **Positions:** legislative bills the individual has expressed an interest in.
  - **Keywords:** 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 in this manual 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 of the **LAST or FIRST NAME** field. As soon as you click off the **LAST NAME** field the box will auto-generate. If there are no contacts in your database that match the **NAME** that you entered, then you will not see the box and can continue adding the record.

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.



Organizations

Adding a new Organization Record

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

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

3. In the Organization Name box, **type the name of the Organization**.

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

Parts of an Organization Record

- **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'd 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 of 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 easily identify the preferred phone number, email address, or mailing address when there are multiple options to choose from.

- **File Attachments:** You can attach up to 5 documents to each contact record. There is a limit of 2MB per item. *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 and areas of concern.
    - **Positions:** legislative bills the organization has expressed an interest in.
    - **Keywords:** 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 in this manual titled **Groups**.

Households

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 on the **Create menu** 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. Complete the **Address** information for the household. If desired, complete any additional information about the Household.

5. When done, click the **Save** button.

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'd 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 of the mailing address, these fields will auto populate with district information.

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

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

- **File Attachments:** You can attach up to 5 documents to each contact record. There is a limit of 2MB per item. *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 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:** a hierarchal tree to classify the Household's interests and areas of concern.
  - **Positions:** legislative bills the Household has expressed an interest in.
  - **Keywords:** 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 in this manual titled **Groups**.

Editing and Deleting a Contact Record

Editing a Record via the Summary Screen

There are several fields that 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**.

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

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

Deleting a new Record

Records should be deleted if they are 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**.
3. To the far right, click **Delete Contacts.**
4. Click **Delete contact(s)** to proceed.
5. Click on the **Home** icon to get out of the record.

Deleting 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 **Actions.**
4. In the filter box, type in delete and then click **Delete contacts.**
5. Click **Delete contact(s)** to proceed. A message will indicate deletion.

Notes

Are used to track miscellaneous information about contacts in the notes tab of a contact record.

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. If desired, type a **Subject** for the note.
5. Click in the note box and **type** the **desired note**. 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 **the three dot menu**, then click **Comment**.
4. Add desired **Comment** and click **Save**.

Note: You cannot search on Comment 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 **the three dots**, then **Delete**.

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

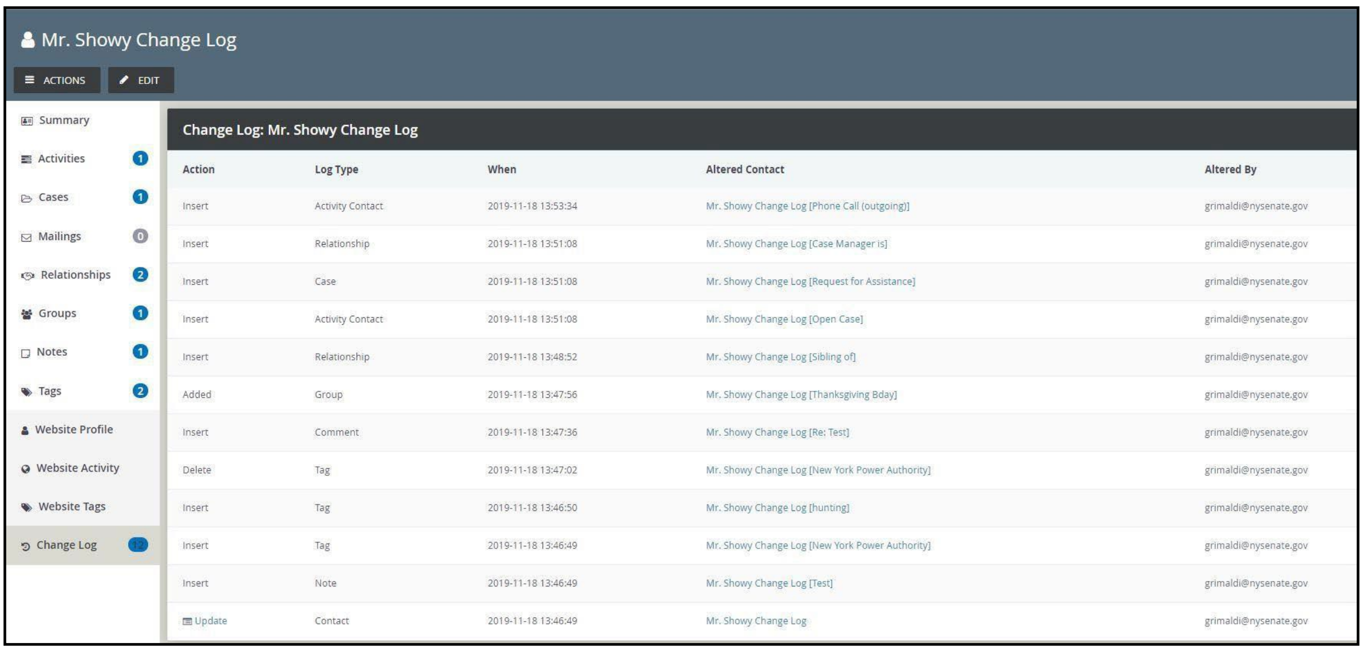
Log Type: what tab or field on the record was modified

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:

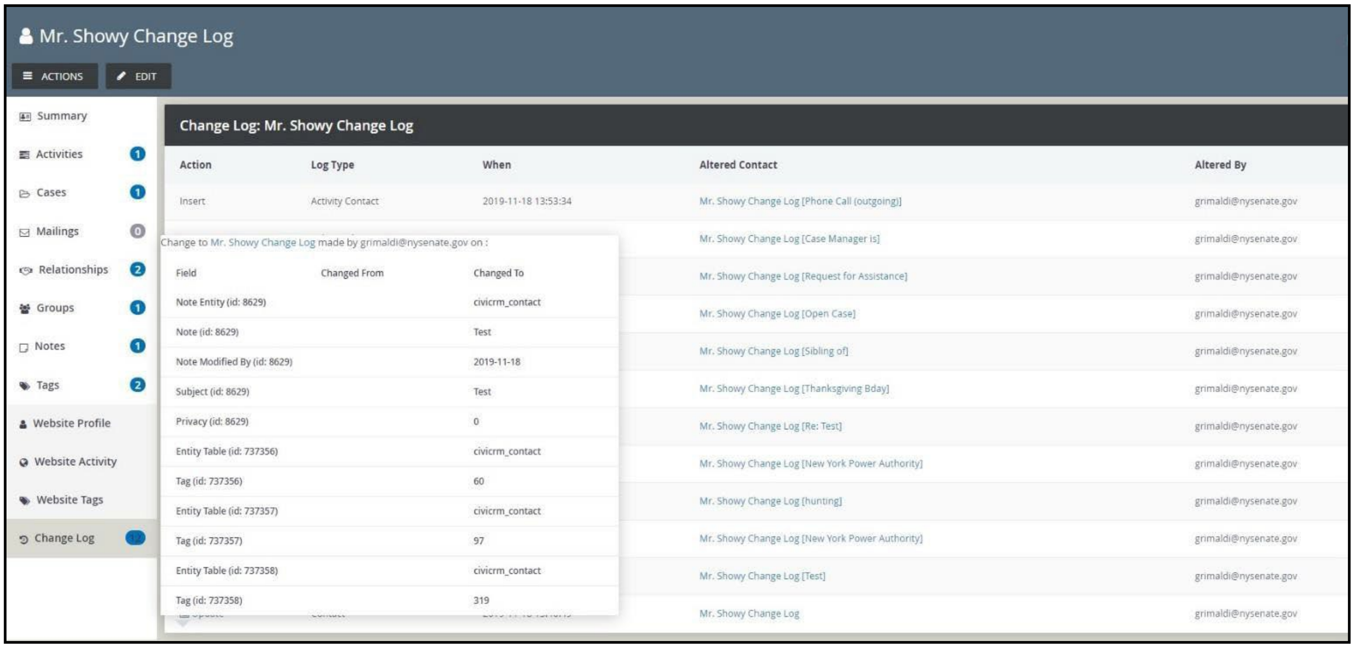


Action	Log Type	When	Altered Contact	Altered By
Insert	Activity Contact	2019-11-18 13:53:34	Mr. Showy Change Log [Phone Call (outgoing)]	grimaldi@nysenate.gov
Insert	Relationship	2019-11-18 13:51:08	Mr. Showy Change Log [Case Manager is]	grimaldi@nysenate.gov
Insert	Case	2019-11-18 13:51:08	Mr. Showy Change Log [Request for Assistance]	grimaldi@nysenate.gov
Insert	Activity Contact	2019-11-18 13:51:08	Mr. Showy Change Log [Open Case]	grimaldi@nysenate.gov
Insert	Relationship	2019-11-18 13:48:52	Mr. Showy Change Log [Sibling of]	grimaldi@nysenate.gov
Added	Group	2019-11-18 13:47:56	Mr. Showy Change Log [Thanksgiving Bday]	grimaldi@nysenate.gov
Insert	Comment	2019-11-18 13:47:36	Mr. Showy Change Log [Re: Test]	grimaldi@nysenate.gov
Delete	Tag	2019-11-18 13:47:02	Mr. Showy Change Log [New York Power Authority]	grimaldi@nysenate.gov
Insert	Tag	2019-11-18 13:46:50	Mr. Showy Change Log [hunting]	grimaldi@nysenate.gov
Insert	Tag	2019-11-18 13:46:49	Mr. Showy Change Log [New York Power Authority]	grimaldi@nysenate.gov
Insert	Note	2019-11-18 13:46:49	Mr. Showy Change Log [Test]	grimaldi@nysenate.gov
Update	Contact	2019-11-18 13:46:49	Mr. Showy Change Log	grimaldi@nysenate.gov

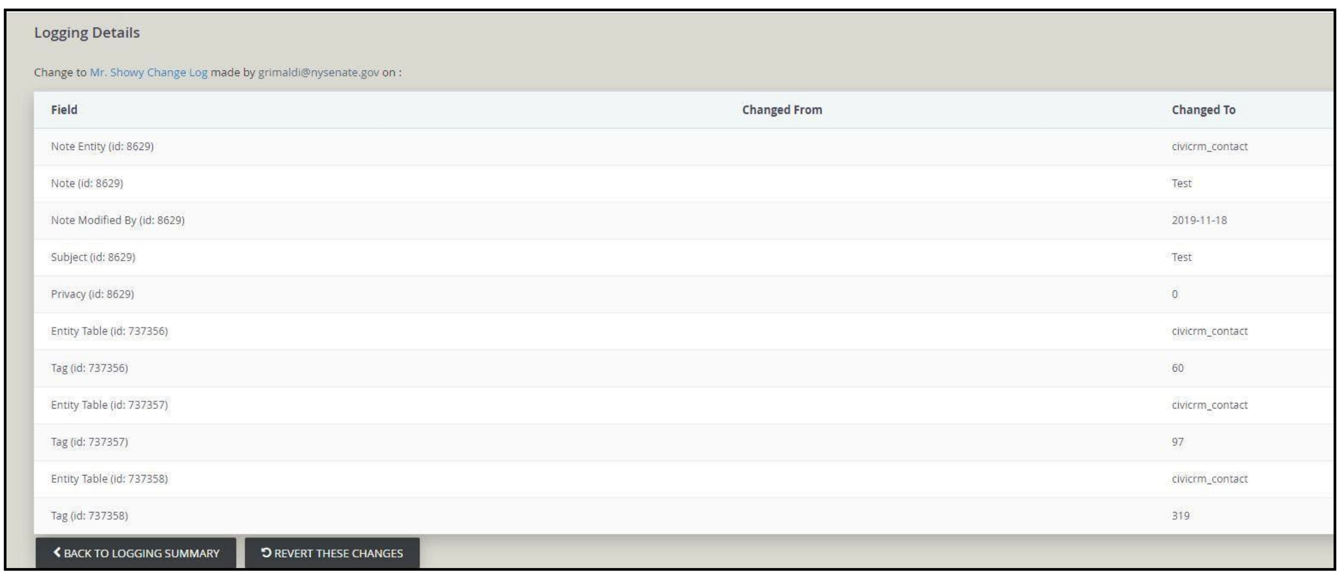
On the Change Log you may see the term **Updated** in the Actions column. This appears when a change is made to the record's Summary tab. For example, an email address was changed or a phone number was added to the record.

If you see Updated, there are two ways you can view this information:

1. You can **mouse** over the **ID card icon** to see the change in more detail.



2. You can **click** on the **Update** link to open a screen with the details listed out.

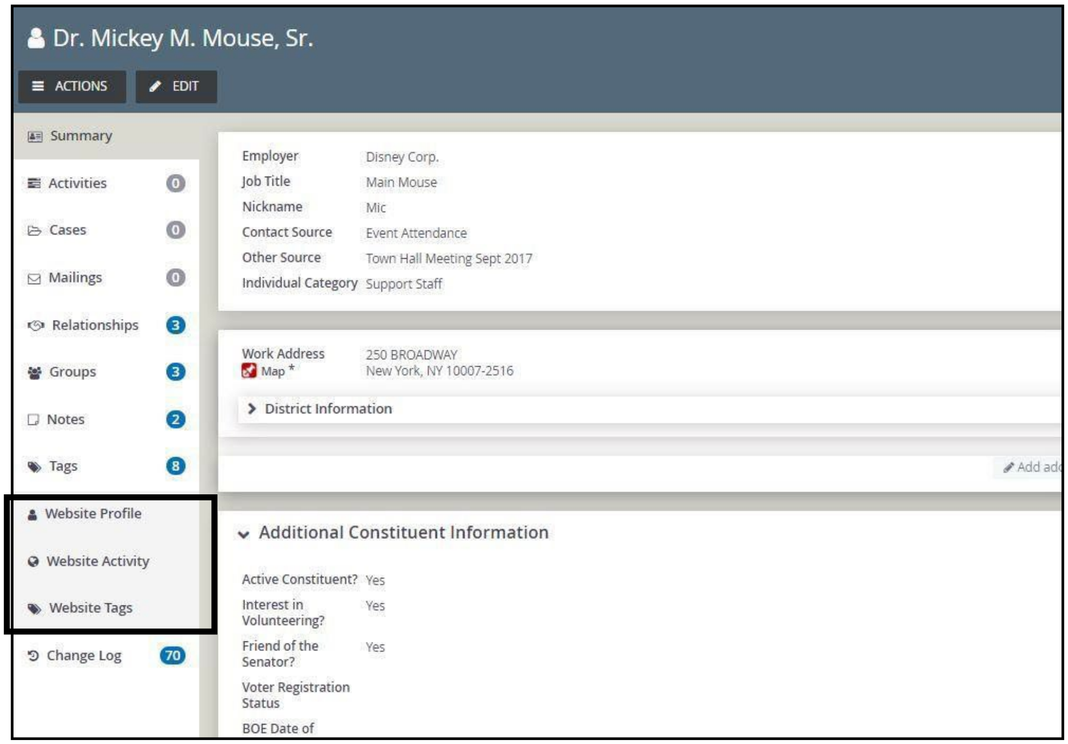


If you need to revert the changes that you see, you do have that option by clicking on the **Revert These Changes** button. Click **Ok** at the prompt.

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 3 tabs: Website Profile, Website Activity, and Website Tags.



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

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.

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 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 – add to contacts.**
4. Check box for **desired Issue Code**.
5. 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 **Tag-remove from contacts.**

4. Check box for **desired Issue Code** that you want to remove.
5. Click **Remove Tags from Contacts**.

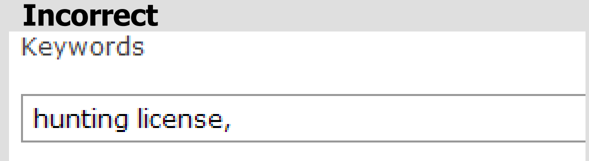
Selecting Keywords for a Single Record

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**.
4. Click the **desired option** from the dropdown list.

Note: To add a new keyword, type the keyword and then hit enter.

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, the page will autosave your changes.

Selecting Keywords for Multiple Records

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

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-add to contacts.**
4. Click in the Keywords box and begin typing the **desired keyword**. (*A minimum of 3 characters* needs 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.)
5. Click the **desired option**. If necessary, repeat until all Keywords have been added.
6. 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 **Tag-remove from contacts.**
4. 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. If the Keyword you are entering does not exist, the list will only display what you typed.)
5. Click the **desired option**. If necessary, repeat until all Keywords have been added.
6. Click **Remove Tag from Contact(s)**.

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 3 characters needs 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. When completed the tag screen will link to OpenLeg. Links to each bill will be located at the bottom of the tag page.

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-add to contacts.**
4. 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 3 characters* need to be entered before a list of bills will appear.)
5. Click the **desired option** from the dropdown list. (If necessary, repeat this step until all Positions have been added to the box.)
6. 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 **Tag-remove from contacts.**
4. Click in the Positions box and begin typing the **desired text** that you want to remove. Click the **desired option** from the dropdown list.
5. Click **Remove Tag from Contact(s)**.

Note: No role within Bluebird can delete Positions. The Positions are available based off of 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

Creating a New Issue Code or Keyword

Note: This option is only available to Office Administrators.

1. From the main navigation area, click on the **Manage menu** and then click **Manage Tags**.
2. On the next screen choose the tab that you would like to add, either **Issue Codes** or **Keywords**.
    - For **Issue codes** go to the tree to find where you would like to add the Issue Code, if it is a parent code then mouse over Issue Codes at the top of the list, if it is a child code mouse over the appropriate parent code.
        1. Select the **+ Add Child** to add tag.
        2. In the popup box add a **Tag Name** and if desired a description, click **Save.**
    - For **Keywords** mouse over Keywords in the list
        1. Select the **+ Add Keyword** to add tag.
        2. In the popup box add a **Tag Name** and if desired a description, 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 or a Keyword

1. From the main navigation area, click on the **Manage** menu and then click **Manage Tags**.
2. On the next screen choose the tab that you would like to edit, either **Issue Codes** or **Keywords**.
    - For **Issue Codes** go to the tree and click on the Issue Code you want to edit.
        - In the box on the right of the screen, click on the name of the Issue Code, and then click on the **pencil**.

        - In the box, edit the **Tag Name** then click **the blue check.**
- For **Keywords** click the Keyword in the list, you want to edit.
    - In the box on the right of the screen, click on the name of the Keyword, and then click on the **pencil**.
    - In the box, edit the **Tag Name** then click **the blue check.**

Moving an Issue Code

1. From the main navigation area, click on the **Manage** menu, click **Manage Tags**.
2. On the next screen choose the **Issue Codes** tab.
3. Go to the tree and mouse over the **Issue Code** you need to move.
4. **Click and drag** into the part of the tree you want the Issue Code to go.

Converting a Keyword to an Issue Code

1. From the main navigation area, click on the **Manage menu**, click **Manage Tags**.
2. On the next screen choose the **Keywords** tab.
3. Go to the list of Keywords and click on the **desired Keyword** you want to convert.
4. Select the **move tag button**.
5. In the popup box, select **Main Tag Tree** in the select Tagset drop down menu. Click **Continue**.
6. Click **Issue Code** tab. The Keyword will now show at the top of the Issue Code tree. You can move the newly converted **Issue Code** to anywhere on the tree by clicking and dragging.

Merging two Issue Codes

1. From the main navigation area, click on the **Manage menu**, click **Manage Tags**.
2. On the next screen choose the **Issue Codes** tab.
3. Go to the Issue Code tree and **click one of the Issue Codes** you want to merge.
4. Holding the Ctrl key on your keyboard, select the other Issue Code you want to merge. Once two Issue Codes are selected a Merge Tags button will appear on the right of the screen. Click the **Merge Tags** button.
5. In popup box **type in a new name** of the combined Issue Code and select **Merge.**
6. The screen will refresh with an updated list of Issue Codes reflecting the merge.

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 two Keywords

1. From the main navigation area, click on the **Manage menu**, click **Manage Tags**.
2. On the next screen choose the **Keywords** tab.
3. Go to the Keywords list and **click one of the Keywords** you want to merge.
4. Holding the Ctrl key down on your keyboard, select the other Keyword you want to merge. Once two Keywords are selected a Merge Tags button will appear on the right of the screen. Click the **Merge Tags** button.
5. In the popup box **type in a new name** of the combined Keyword and select **Merge.**
6. The screen will refresh with an updated list of Keywords reflecting the merge.

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 is refreshed it will put everything in order alphabetically.

Deleting an Issue Code or a Keyword

1. From the main navigation area, click on the **Manage menu**, click **Manage Tags**.
2. On the next screen choose the tab that has the tag you would like to delete, either **Issue Codes** or **Keywords**.
    - For **Issue codes** go to the tree, **select** the Issue Code you want to delete.
        - Select the **Delete** button to delete the Issue Code.
        - In the popup box click **Delete.**
    - For **Keywords** click on the Keyword in the list you want to edit.
        - Select the **Delete** button to delete the Keyword.
        - In the popup box click **Delete**.

Note: You will not be able to delete a Tag if it is marked as Reserved. If you have a Tag that you want to delete that is reserved call the Help Line (x2011).

Relationships

Relationships allow you to connect two contacts by creating a quick link within their records.

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 are viewing when selecting Add Relationship from the 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.

Creating an Individual Relationship

1. Find one of the Contact records that you want to build a relationship with.

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.

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. You also have the option to create a record from this screen.

8. If desired, fill in the optional fields, and then click the **Save Relationship** button.

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(s)** of the Individual Record(s) you would like to add from the auto-complete list so the name(s) appears in the Contact(s) box.

8. If desired, fill in the optional fields.

9. Make sure there is a checkmark ✓ in the **Enabled** box.

10. When done, click the **Save Relationship** button.

Creating a Household Relationship

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

2. From the Household record view screen, click on the **Relationships tab**.

3. Click on **Add Relationship**. Click the dropdown arrow across from Relationship Type.

4. Click the **desired relationship** choice from the list.

> **Note**: If you bulk add you will be adding all people in that household as *Members of* the household. If need be, you can go back and edit a particular person's record and change them to *Head of Household*.

5. Click in the **Contact(s)** box and begin typing the **last name** of the contact, you want to add to the Household. Click the name from the auto-complete list so the name appears in the Contact(s) box. Add more names if necessary.

6. If desired, fill in the optional fields.

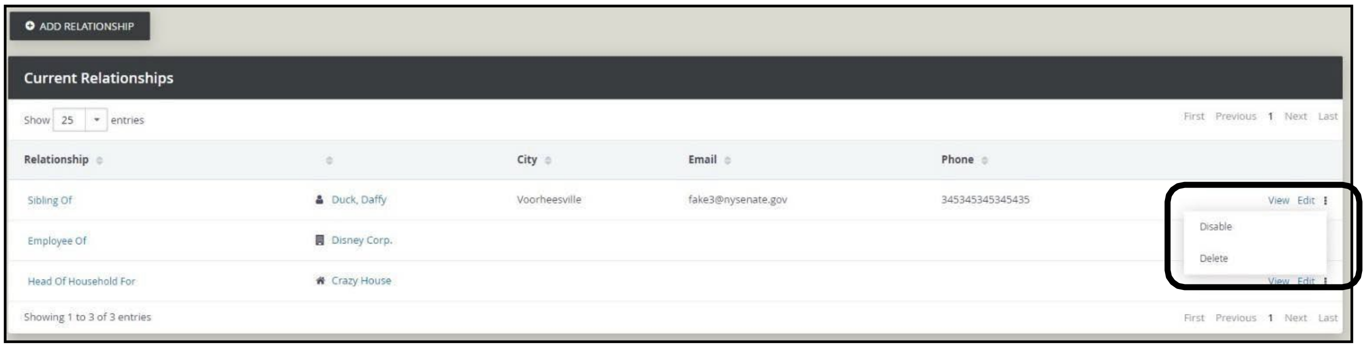
7. Make sure there is a checkmark in the **Enabled** box.

8. When done, click the **Save Relationship** button.

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 view screen, click on the **Relationships tab.**
3. A listing of Current Relationships will display. Click **the three dots** across from the desired choice.



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

This contact now appears in the Inactive Relationships section.

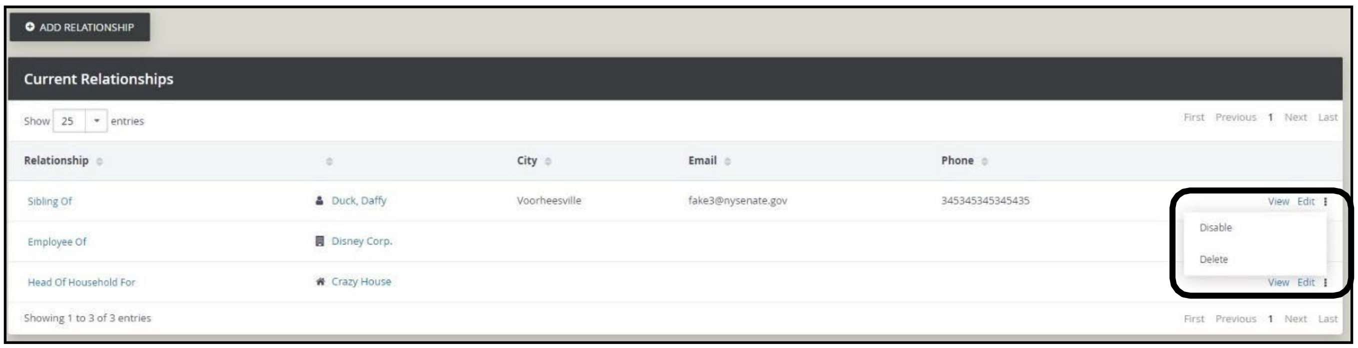
Deleting a Relationship from a Record

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

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 **Delete** 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 constituents in Albany County, you could save that search for future use and title it Albany County Smart Group. If another staff person enters a new contact that lives in Albany County, they would appear in the Albany County Smart Group results the next time it is run because they meet the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, and then click **New Group**.

2. Type a **name for** the group in the Group Title box.

3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*

4. If desired, choose a **Parent Group**.

5. Click **Save**.

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,** and 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 you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.

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** button and type in the filter box the name of the **desired group**. Click **the group** and then 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 **records** and then click **Actions**.

3. Click **Group – Add Contacts**.

4. Make sure the radio button is selected next to **Add Contacts to Existing Group**.

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 **the three dot menu**, across from the Group that you would like to edit.

3. When you click on **the three dot menu**, 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. In the Current Groups listing 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 **the three dot menu** across from the Group you want to disable.

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

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**. Across from the Group, click **the three dot menu**, **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 **the three dot menu** across from the Group you want to delete.

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

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

Adding Staff Members to the Office Staff Group

In order to use the *Assign To field* within Activities and Cases, you first need to have your office staff listed in the Office Staff Group. Complete the steps below.

To add one person at a time:

1. Search the database to find the **Office staff user record** you want to add to this group.
2. From the Office staff user's record view screen, click on the **Groups tab**.
3. Click **Add to a group** and select **Office Staff** from the list.
4. Click **Add.** This contact is now added into this Group.

To bulk add:

1. Click in the **Quick Search** box and select the radio button next to Email.
2. Type **%@nysenate.gov** and then press **Enter** on your keyboard.
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** and click **Group - Add Contacts**.
5. In the select group drop down menu, choose **Office Staff**.
6. Click **Add to Group**.
7. A message popup box 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

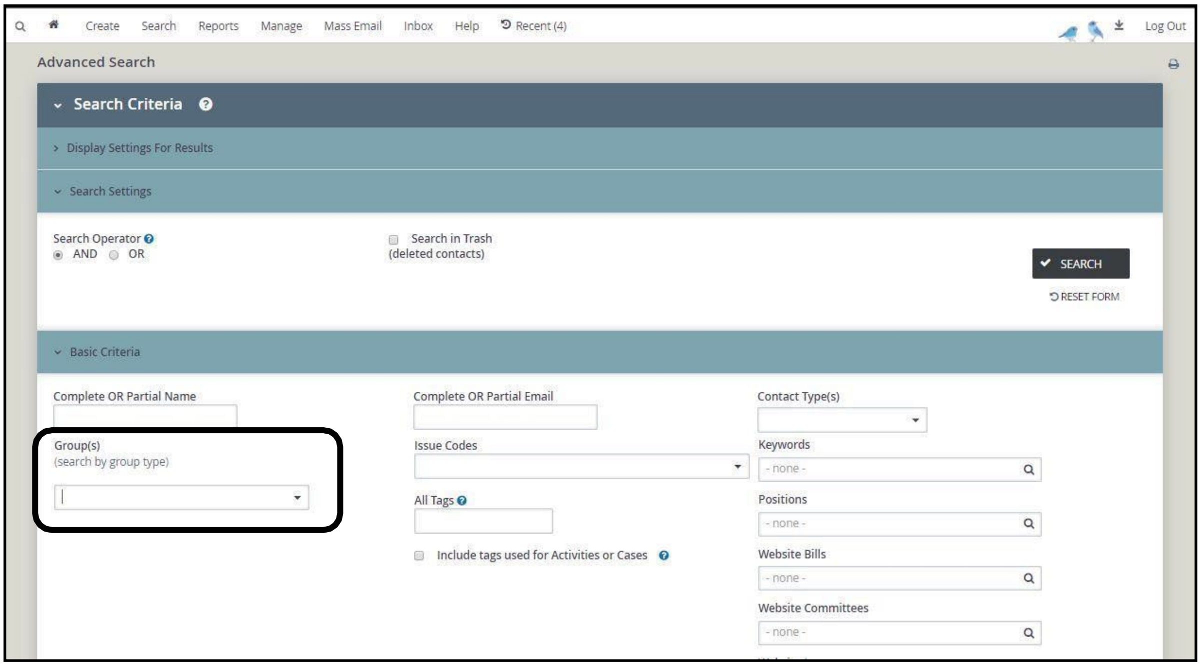
1. Search the database to find the **desired common** records.

> **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. After selecting the desired records, click **Actions** and then click **Group – Create new smart group.**
4. Type a **name** for the Smart Group. If desired, enter in a description.
5. If you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.
6. Click **Save Smart Group**.
7. 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 **Search**, then click **Advanced Search**.
2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



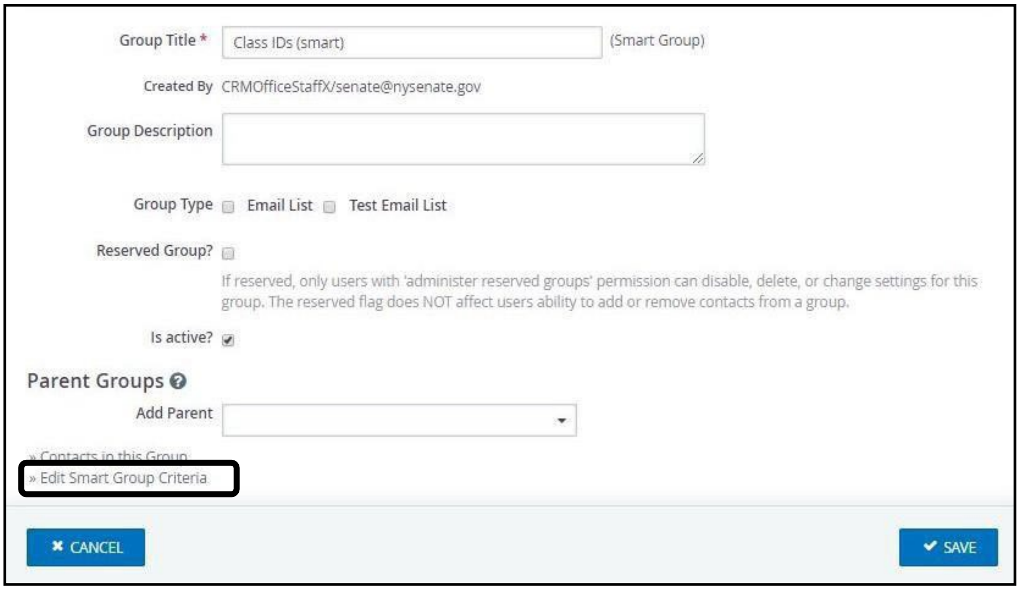
3. Click the **desired Group**.
4. Click **Search** to display a list of names.

Editing Smart Group Name, Description, or Email List

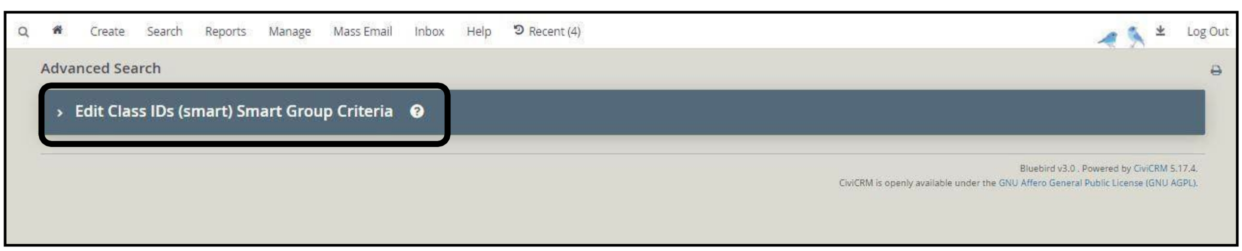
1. From the main navigation area, click **Manage**, and then click **Manage Groups**.
2. Click on the **three dot menu**, across from the Group that you would like to edit.
3. When you click on the **three dot menu**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; 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 a Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.
2. Click on the **three dot menu** link, across from the Group that you would like to edit.
3. When you click on the **three dot menu** 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

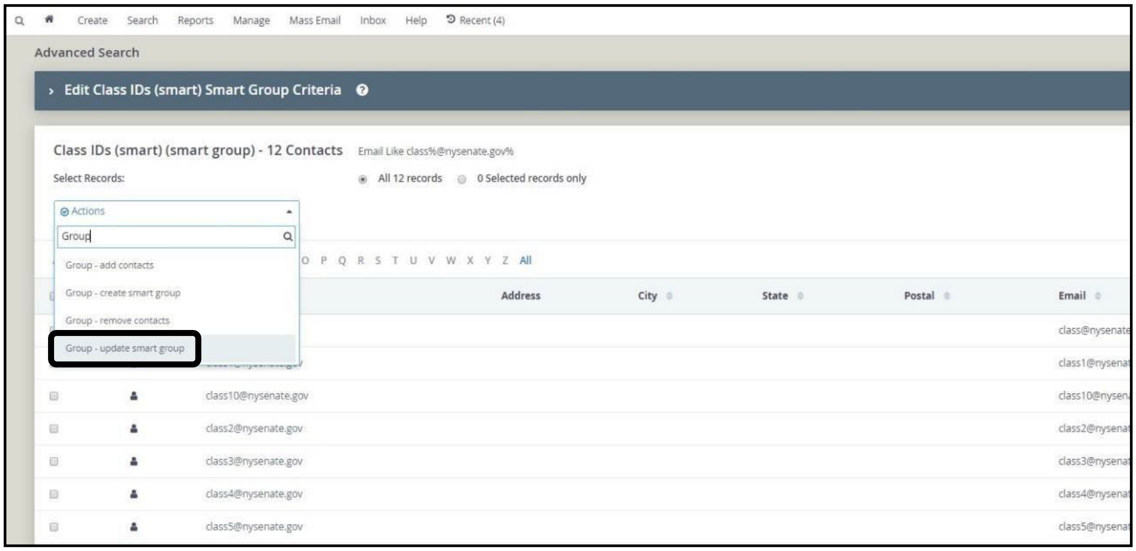


5. On the next screen click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

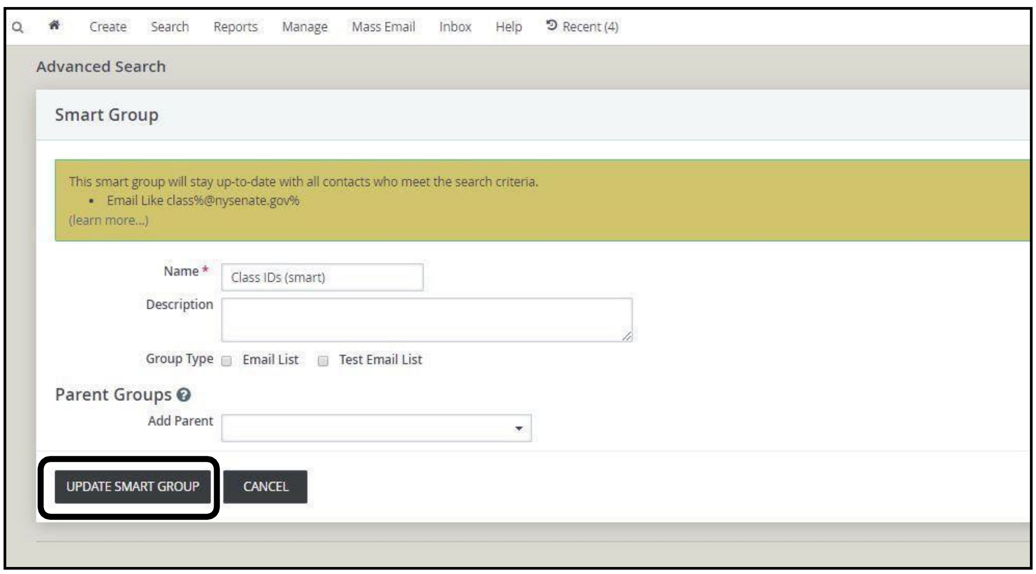


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, select **Update Smart Group** from the dropdown Actions menu, click on Go.



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

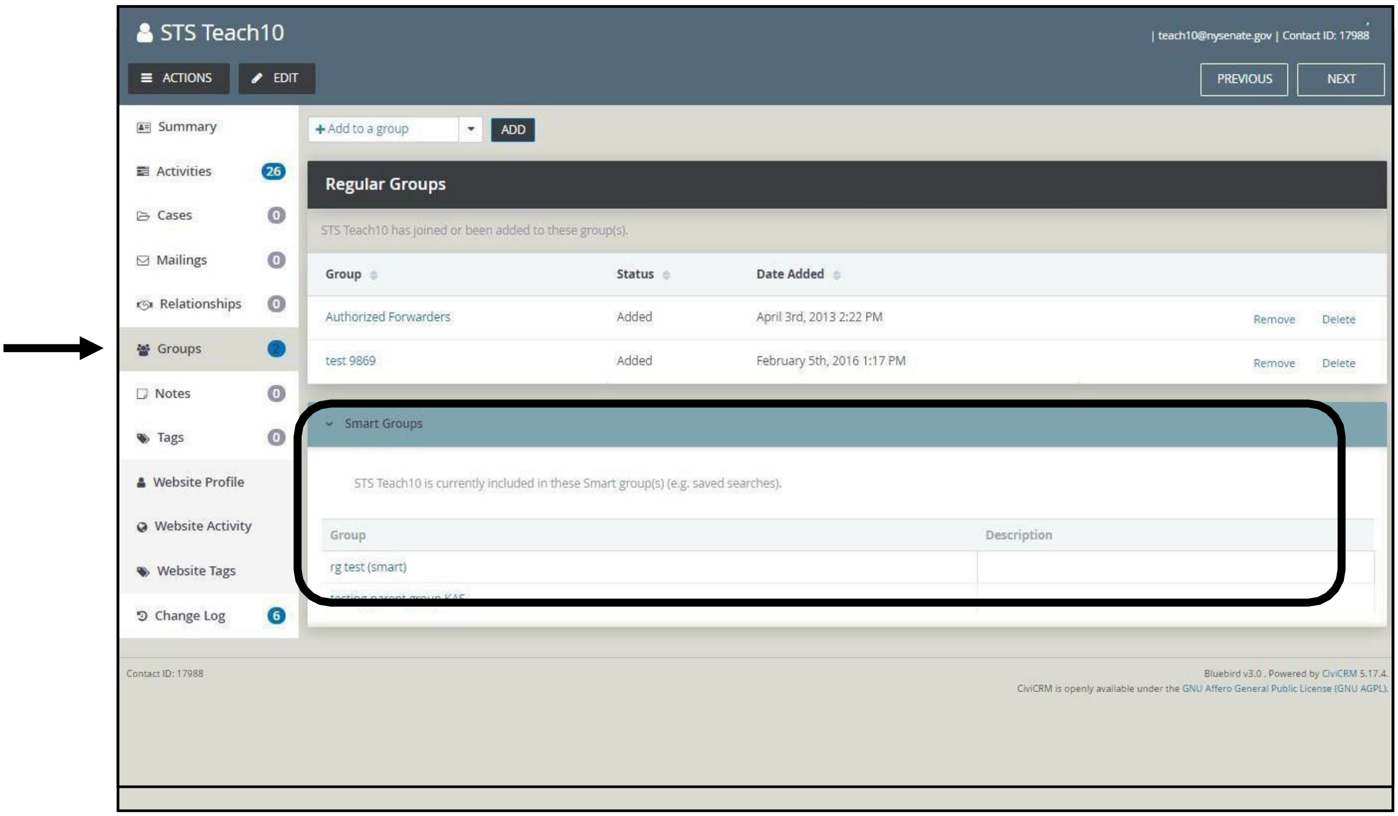


8. You will see the button change to Processing, then a message popup box will tell you the Smart Group has been saved. On the next page, click Done.

Note: This will bring you back to the Edit Advanced Search criteria page. You can click the Home icon 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 have used Activities instead of a Case, related issues will not be grouped together within the Activities Tab, but rather listed in a chronological order based on 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 the communication between constituents and staff.

Activities differ from Issue Codes and other tagging mechanisms in that they record more information about the type of communication taking place such as time, date, location, and how they contacted the office.

In addition to searching for activity records using the Advanced Search screen, you can also use the **Find Activities** search option listed under the Search menu in the main navigation area. This type of search will allow you to retrieve activity records by type, status, and other values.

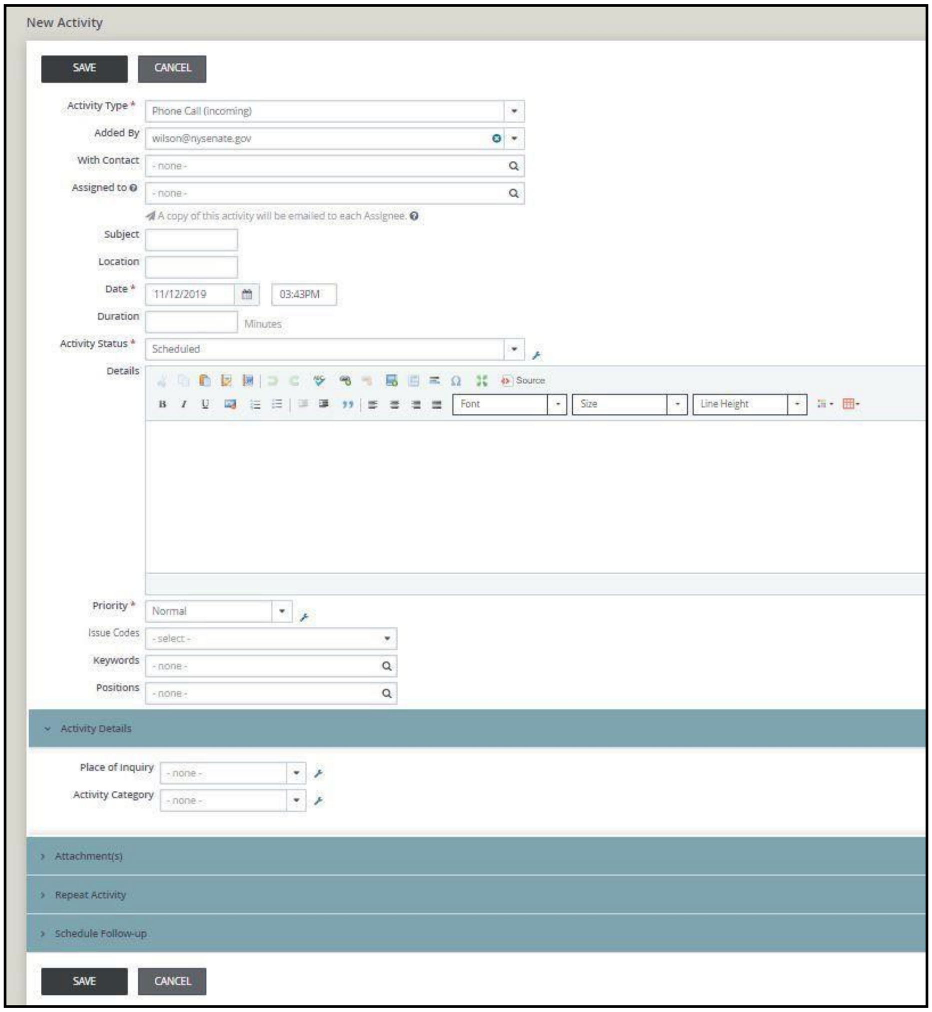
Visit a contact's Activities tab to review a history of past communication records. From this tab you can delete or edit existing activities. For example, you may return to a scheduled activity record to mark it complete and add some final notes.

Activities are created from the contact's Activity tab or from the Create menu on the main navigation area.

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 **New Activity** button.
4. Click on desired **Activity Type** (i.e. the method of communication).
5. The Activities page will display. Fill in the **mandatory fields** and add any additional fields.
6. When finished recording the activity, click **Save**.

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 password.)
- **With Contact:** section will be prefilled with the contact's name.
- **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. 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 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).
- **Status**: A required field, used to select the current 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.
- **Tags:** You can add an Issue Code, Keyword, or Position to an 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).
- **Attachments:** You can attach up to five documents to each Activity. There is a limit of 12MB per item. *Please note that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.*
- **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, using the term "Follow-up" in the Subject is a good rule of thumb. Once saved, you will be able to edit the activity from the contact record's Activity tab. You will also see additional options that are usually available for Activities and adjust the Subject line as necessary.

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** button and select **Add activity.**
4. You will then be given options to select an **activity type**, as well as enter in **details** regarding the activity. When you have filled out the information you need, click the **Save** button. This will refresh the screen and bring you to the Find Activities search screen.

> **Note: Activity Separation-** Create a separate activity for each contact check box: By default, a single activity record will be created and linked to all the contacts listed above. If you think you might be editing the activity later check this box to create separate activity records. This will allow you to edit each record without affecting the whole selection.

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 **the three dot menu** across from desired choice.
4. Click **Delete** from the menu. On the pop up box, click **Delete**. 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.

1. Search the database to find the desired **Contact record.**
2. Create a Case for this Contact. (See section titled **Creating a Case**)
3. From the Contact record's view screen, click **Activities.**
4. A listing of Activities will display. Click **the three dot menu** across from the Activity you want to move.
5. Click **File on Case** from the menu.
6. 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 (You also have the option to create a case from here).
7. 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.
8. If desired, type a Subject.
9. When done click **Save**.
10. The activity will still show in the current record but the Subject line will change to (filed on case #).

Cases

Cases are basically **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 can be created from the contact's Cases tab, Actions Menu, or from the Create menu on the main navigation area.

Creating a Case

1. To create a case, search the database to find the **Contact record**.
2. From the contact record view screen, click **Cases**.
3. Click **Add Case**.
4. The Open Case page will display. Fill in **mandatory fields** listed below.

Case Information

- **Medium**: This is a required field, used to identify how you were contacted by the individual (i.e. In Person).
- **Location**: This field can be used to further designate the source or indicate where the Case information was obtained from (i.e. if you were at an event and someone came up to you and asked for assistance).
- **Details**: Used to record notes relevant to the Case problem.

Case Activity Details

- **Place of Inquiry:** Used to designate where the Case originated.
- **Activity Category:** Used to classify the record by the nature and purpose of the communication (i.e. a legislative position).
- **Subject**: This is a required field, used to capture a brief description of the Case.

- **Case Type**: This is a required field, used to indicate the purpose of the case. When creating a Case, the most important step is to select the correct Case Type. The following Case Types are available:

    - *General Complaint:* General complaint about government, government service, or private organizations.

    - *Request for Assistance:* Asking for assistance with an issue they are having a problem with.

    - *Request for Information:* Request for general information.

    - *Event Invitation:* Invitation to attend or participate in a constituent event.

    - *Government Service Problem – Local:* Problem with a local government entity.

    - *Government Service Problem – State:* Problem with a state government entity.

- **Case Status:** This is a required field, used to indicate the status of the Case.

- **Case Start Date:** This is a required field, used to indicate the date that the Case was started.

- **Attachments:** You can attach up to five documents to each Case. There is a limit of 12MB per item. *Please note that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.*

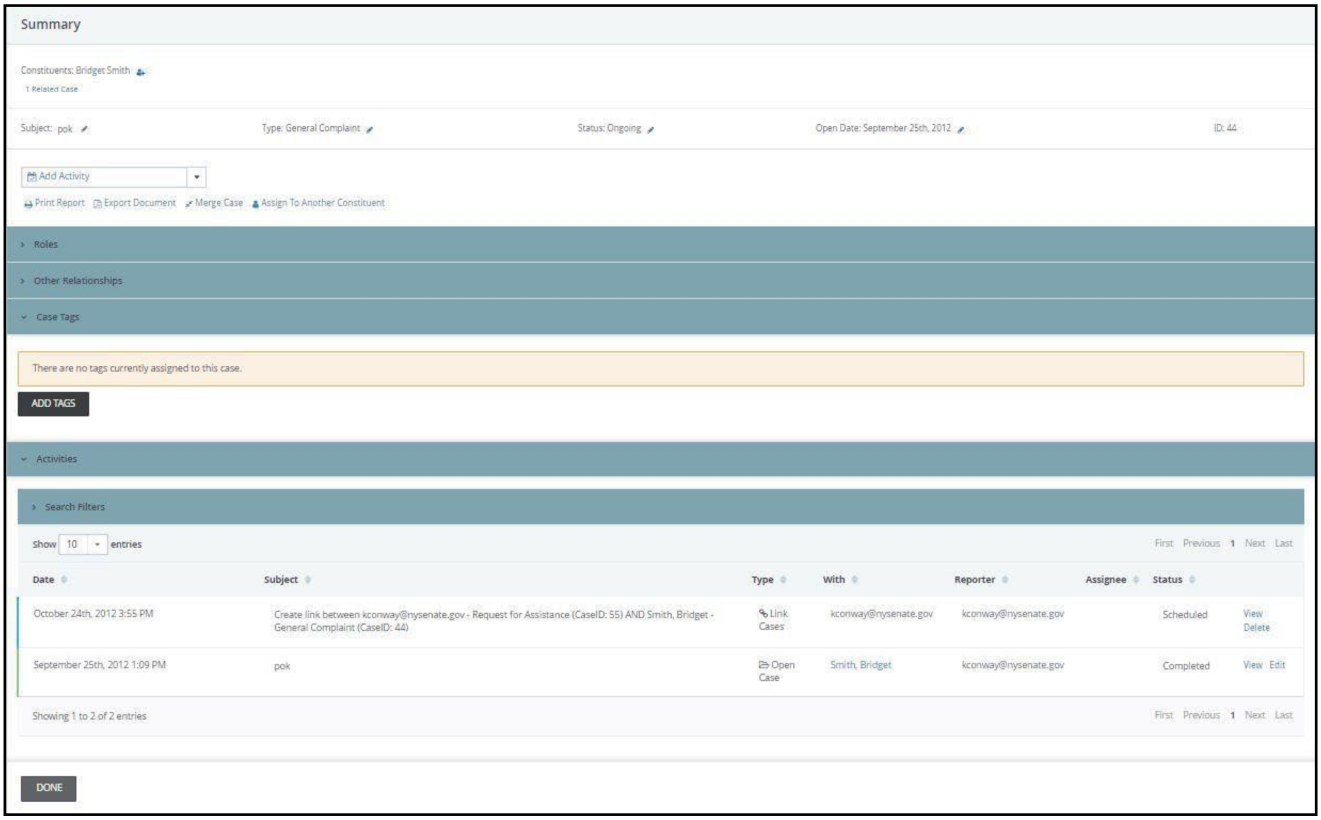
- **Duration**: Total time spent on the Case (in minutes).

- **Tags:** You can add an Issue Code, Keyword, or Position to this Case.

5. When finished completing the Case form, click **Save,** or if you want to add another Case to this contact, click **Save and New**.

> **Note**: Once you have created a Case, you are directed to the Case Summary page. If you need to record more activities associated with this Case, you can do so from here. If you are finished working with the Case, click **Done** at the bottom of the page to return to the contact's record.

Parts of the Case Summary Page



The Case Summary page works with four Case tools:

- **Case 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 Issue Codes, Keywords, or Positions.

- **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 first creates the Case, the role of Case Manager 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**.
4. Under Roles, click the **pencil icon** across from the role you want to change.
5. Click in the box and type the **last name** of the office staff person you want to assign. Click on their name from the list and click **Save**.
6. 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 **last name** of desired contact. Click **Save**.

Managing Cases

New Case Activity

1. Search the database to find the desired **Contact record**.
2. From the contact record's view screen, click on the **Cases tab.**
3. Across from the desired Case, click the **Manage** link.
4. Click **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.
    - **Subject**: brief description of this activity.
    - **Medium**: This is a required field, used to identify how you were contacted by the individual (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.
    - **Place of Inquiry:** Used to designate where the Case originated.
    - **Activity Category:** Used to classify the record by the nature and purpose of the communication (i.e. a legislative position).
    - **Details**: Used for adding a more detailed description of the activities.

- **Duration**: Total time spent on this activity (in minutes).
- **Attachments:** You can attach up to five documents to each Case Activity. There is a limit of 12MB per item. *Please note that if you add an attachment in a box that already contains an attachment, the existing attachment will be overwritten without warning.*
- **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, the subject line, and the assignee fields. 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.
- **Status**: A required field, used to select the current 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.
- **Tags:** You can add an Issue Code, Keyword, or Position to this Case.

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's view screen, click on the **Cases** tab**.**
3. Across from the desired Case, click **Manage**.
4. Under Activities, 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's 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's 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

“Moving” is used when a case activity is entered on the wrong case.

“Copy” is used to log the same activity across multiple contacts with the same case.

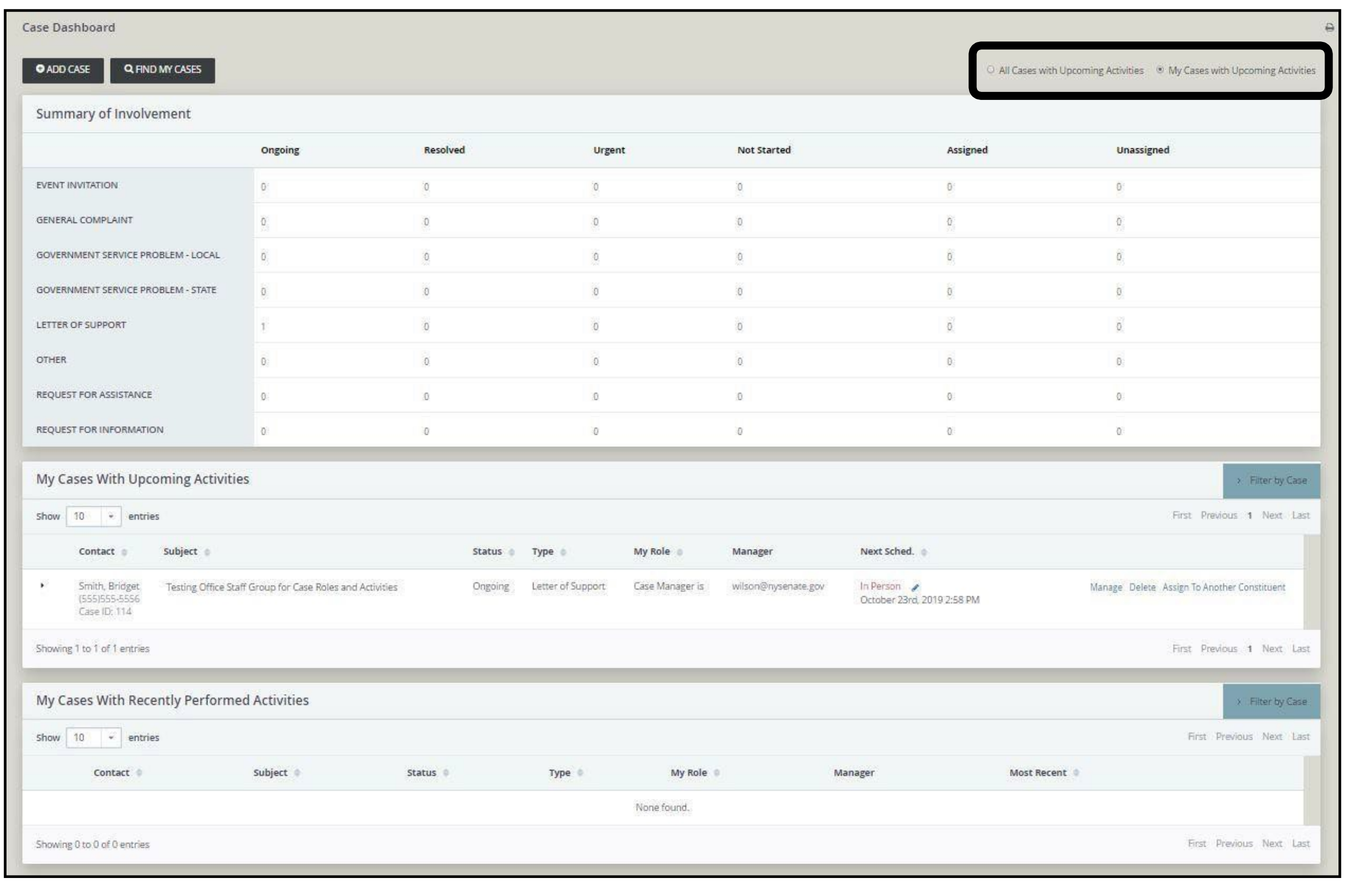
1. Search the database to find the desired **Contact record**.
2. From the contact record’s view screen, click on the **Cases** tab.
3. Across from the desired Case, click the **Manage** link.
4. Click the three dots Under Case Activity, then click **Move to Case** or **Copy to Case** across from the 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 **Save**.

Searching for a Case by Type

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

Understanding the Case Dashboard

The Case Dashboard is found under the **Manage menu**. 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.



Case Reports

There are four options for Case Reports in Bluebird:

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

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

Contact Demographics Reports- Demographic breakdown for case constituents in your database. Includes custom contact fields.

Case Detail Report- This report gives details of the case and activities within the case such as the most recent activity information.

Case Summary Report

1. From the main navigation area, click on the **Reports menu**, 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

1. From the main navigation area, click on the **Reports menu**, 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

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 reporting area there are two main tools:

- 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. At a later time, 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). This will generate the report.

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

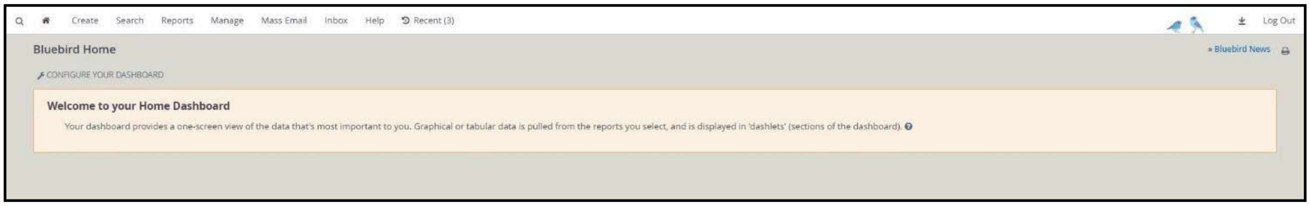
4. Open the Create Report section by clicking on the action bar, click in the **Report Title field** and type a **name for the report.**

5. When finished, click **Create Report**. A message will appear at the top of the screen to let you know your report has been created successfully.

> **Note**: To view all existing saved reports, click on the **Reports menu** off 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.

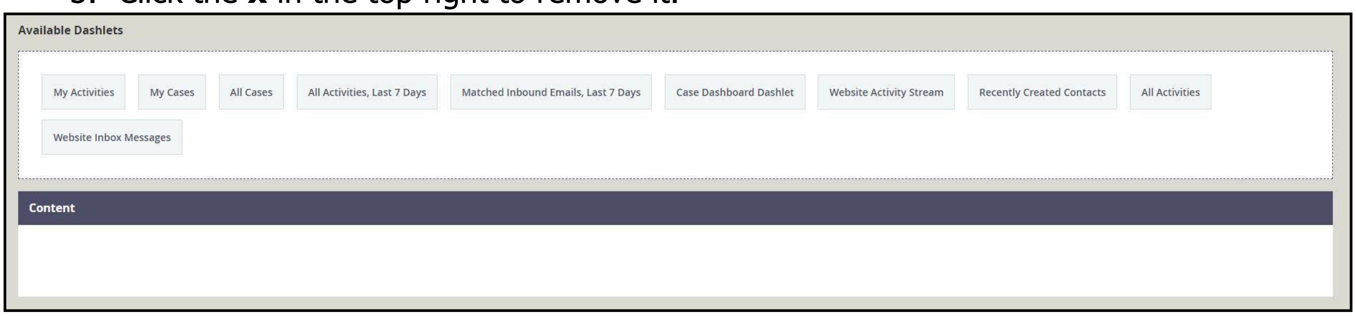
The Dashboard

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



Configuring the Dashboard

1. Click the **Configure Your Dashboard** button.
2. Drag the **desired dashlet** into the content area.
3. Click the **x** in the top right to remove it.



Default Dashlets

Below is a list of default dashlets every Bluebird instance is given along with a brief explanation of each:

- **All Cases**: Displays Cases with scheduled activities.
- **My Cases**: Displays Cases you have opened that have scheduled activities.

- **All Activities**: Displays scheduled Activities.
- **All Activities, Last 7 Days:** Displays any Activities that were created in the past 7 days, including Activities within a Case.
- **Matched Inbound Emails, Last 7 Days**: This option works with Inbound Email.
- **Website Activity Stream:** Displays activity from the Senator's nysenate.gov site.
- **Case Dashboard Dashlet:** Displays Cases that have upcoming activities in chart format. This can show all cases or specifically your cases.

Creating a Dashlet

You can only create a dashlet from a Report. Once you decide what you would like your dashlet to show, complete the following steps:

1. Click **Reports Menu** then click **Create Reports from Templates.**
2. Select the appropriate **Report**. Fill in **desired filters** and **columns**.
3. Click **View Results** button**.**
4. Make any **edits** to the Report if needed by selecting tabs along the top of the screen.
5. To create a dashlet, click the **Access** tab **check off** Available for Dashboard? checkbox.
6. Click in the Title and Format box and **name** report.
7. Click **Refresh Results**. Click **Actions.**
8. Click **Create Report** and then **Continue**.

Returning to the Dashboard

You can return to the Dashboard at any time by clicking the **Home icon** in the Main Navigation area of the screen.

Search Menu

Advanced Search

General Information

Used to search for virtually any information available in the database.

- Click **Search,** from the main navigation menu, and then **Advanced Search** to open the search interface, 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 fields let you set multiple criteria by using a comma separator.

- 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 Activities or Cases.

- 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 search results.

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

By selecting **AND** under Search Operator**, Aging** under Issue Code(s), and typing **11720** in the Zip Code field the result will show all contacts with the Issue Code Aging who live in Zip Code 11720.

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

By selecting **OR** under Search Operator, **Aging** under Issue Code(s), and typing **11720** 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 11720 even if they do not have the Issue Code Aging.

Conducting an Advanced Search

1. Select the **Search** menu, and then 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.
    - **Contact icon**: shows basic details about the contact through a popup screen.

> **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. Select the **Search** menu, and then click **Advanced Search**.
2. Under the Search Settings panel click the check box titled **Search in Trash (deleted contacts)**.
3. Click the Search button to display the search results list.
4. Under the actions drop down menu at the top of the screen you can restore contacts. Check the contacts you wish to restore.

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

Find Cases

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

- Cases by Constituent Name, Email, or Subject
- Case Start/End Dates
- Case Type
- Status
- Case Tags
- Case ID

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)
- Activity Type
- Activity Dates
- Activity Text
- Activity Status
- Activity Tags
- Location
- Website Survey
- Priority
- Follow-up

Find Anything

You can search for records containing a word or phrase in any text field - including name and email fields, notes, activity subject and descriptions, as well as any searchable custom text and note fields. Narrow your search by selecting a specific table / type of record. Wildcards are automatically added to your search term. Searches are NOT case-sensitive.

EXAMPLE: You can enter *fiesta*, and get a match on a contact with a note containing *Fall Fiesta.*

Search and Sorting

- Select the **Search** menu, and then click **Find Anything Search.** Type desired text into the Find * box and select a table option from drop down list.
- To view the attachment, click on the paperclip icon and the attachment will download onto your computer.

Search Builder

This Search allows you to build your own searches based on fields and operators. You can save your searches once they are built.

Proximity Search

This search finds records residing in the same postal code.

1. Click **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 the middle of the postal code.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

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 **Search** menu, then click **Birthday Search**.
2. Fill in **desired information**.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

Include/Exclude Search

This search allows you to include or exclude certain groups from your results. A common reason for this search is if you want to do a district wide constituent postal mailing but would like to exclude members of the press. 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 **Search** menu, then click **Include/Exclude Groups/Tag**.
2. From the Include/Exclude fields, select the **desired Group/Tag to Include and Exclude**.
3. Select and/or search option.
4. Click the **Search** button. The search results window will appear showing the total number of records found.

Tag/Group Changelog Search

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

Tag Count Search

Use this search to generate counts for Tags based on date ranges for when the tag(s) were added. You can search for contact, activity and case tags.

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.

Tag Demographic Search

This search allows you to group Tags and Demographics together to get a count in your database.

For example, I want to see how many people in each postal code in my database are interested in the Issue Code of Aging. I can conduct this search by selecting Aging as my Tag and then Postal Code as my demographic; the results will give me a screen with all of my postal codes with a count of how many records are tagged with Aging.

This type of search is different from Advanced Search because it is only giving a count; you will not get a result of contact names with this search OR receive the actions menu to then do other things to this list (i.e. Tag all results).

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 the down arrow across from actions and then click the desired option.

Exporting Contacts

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 it 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.
- **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. After selecting the records, click **Actions** and then click **Export Contacts.**
3. From the Selected Fields box select **Export PRIMARY fields**.

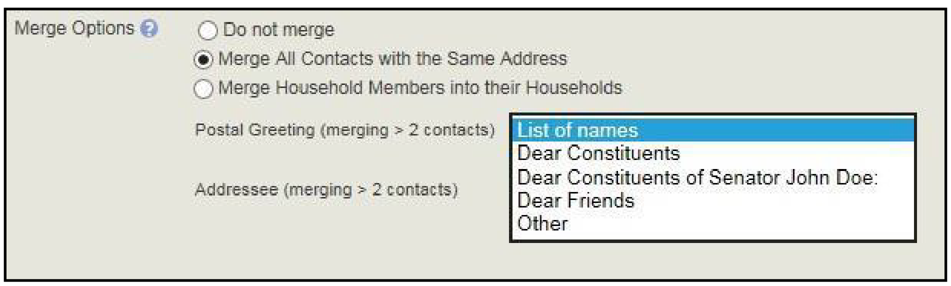
4. If desired, select any additional export options. Click continue to export file.

Merge Options

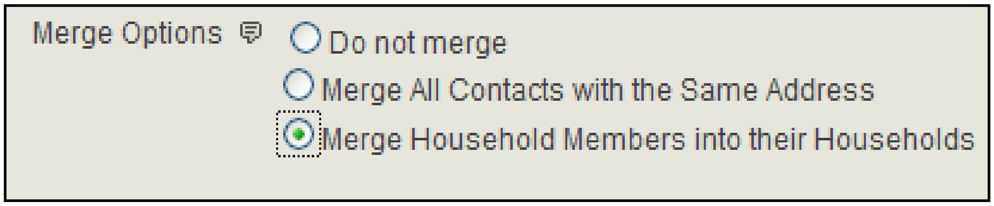
- *Do not Merge:* Use this option to avoid merging records when exporting.

- *Merge Contacts with the Same Address* will combine any records having the same address (street address, city, postal code, country) 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.



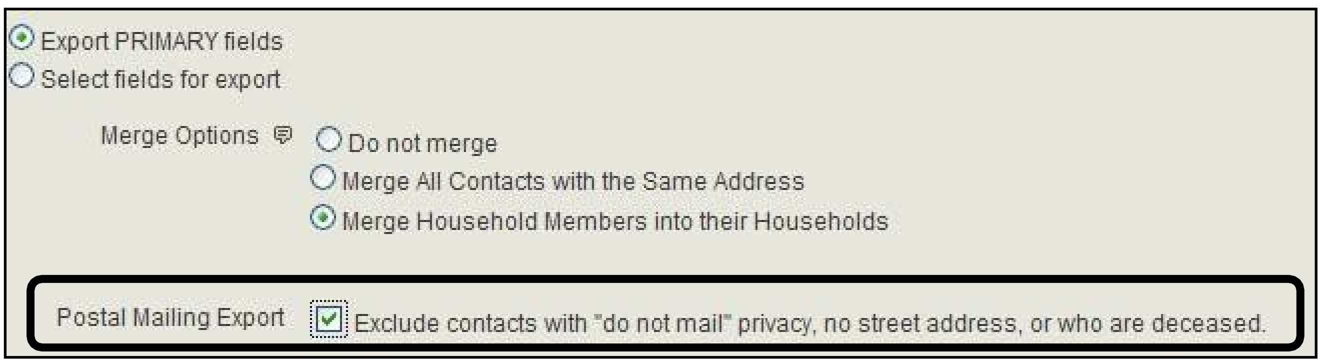
- *Merge Household Members in their Households* will export the household record for any contacts sharing a household address.



> **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.

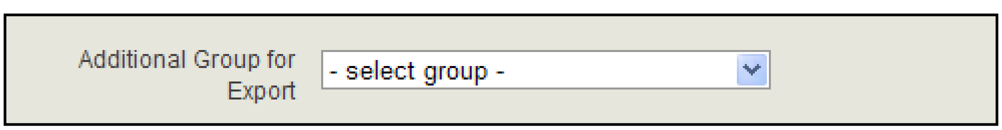
Postal Mailing Exclusions – IMPORTANT

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.



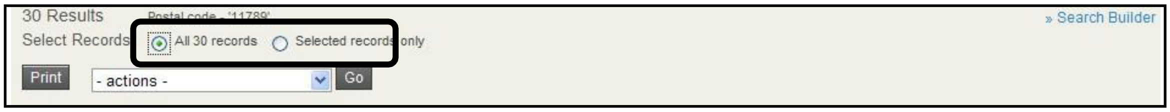
Additional Group for Export

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**.



Export Using the Select Fields for Export Option

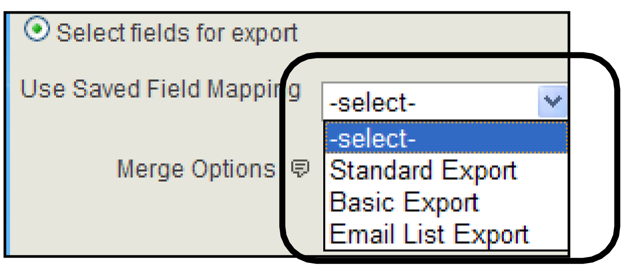
1. In the search result window, click **All or Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)



2. After selecting the records, click **Actions** and then click **Export Contacts.**

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**.



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.

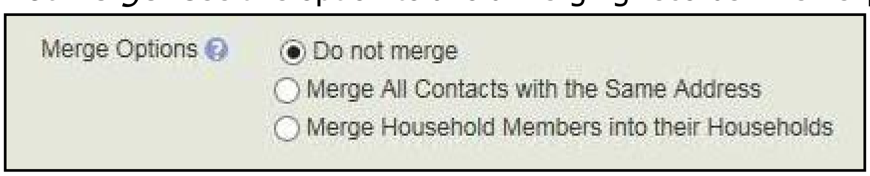
Email List Export: This option will provide the primary fields for Internal Contact ID, First Name, Last Name, Display Name, Email Greeting, and Email Address for all Individuals and Households in your search results.

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.

5. If desired, select any additional export options.

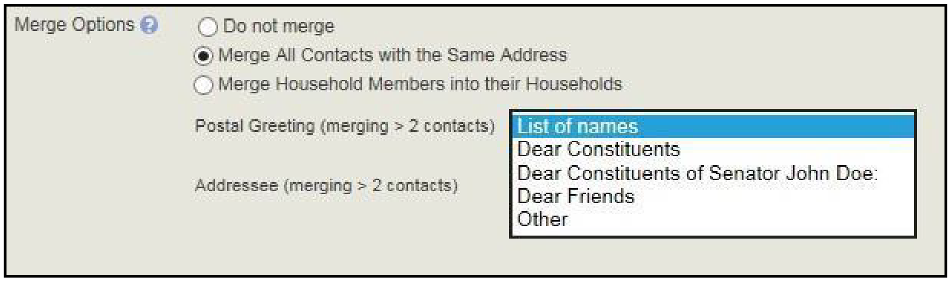
Merge Options

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

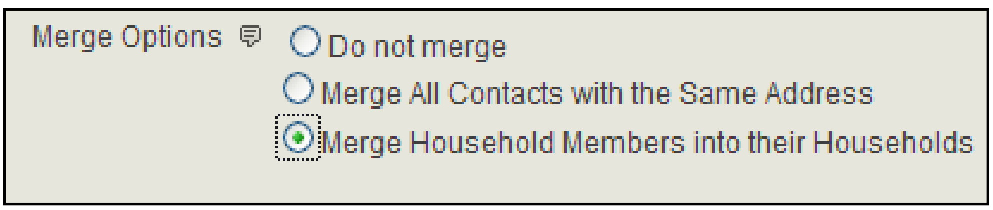


- *Merge Contacts with the Same Address* will combine any records having the same address (street address, city, postal code, country) into a single record. If a household record already exists in which multiple individuals share an address, the household will be exported as the combined record. If no 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* will export the household record for any contacts sharing a household address.



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

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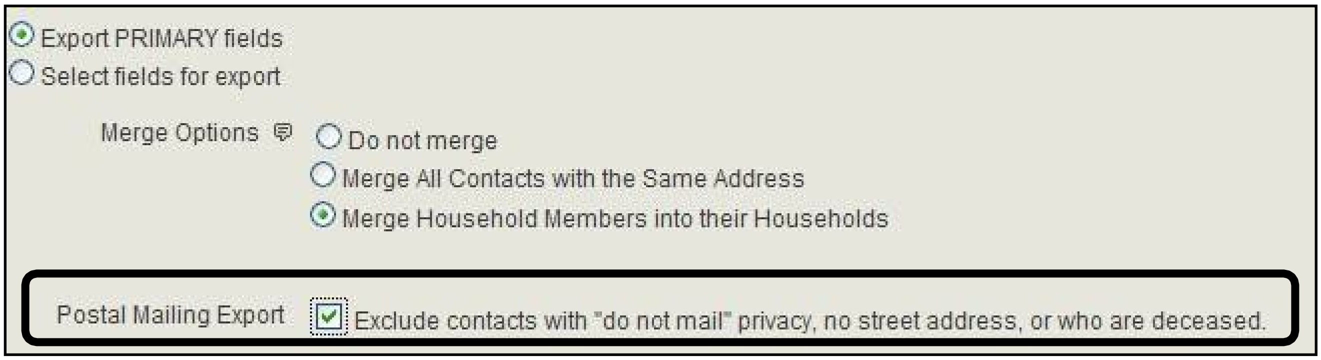
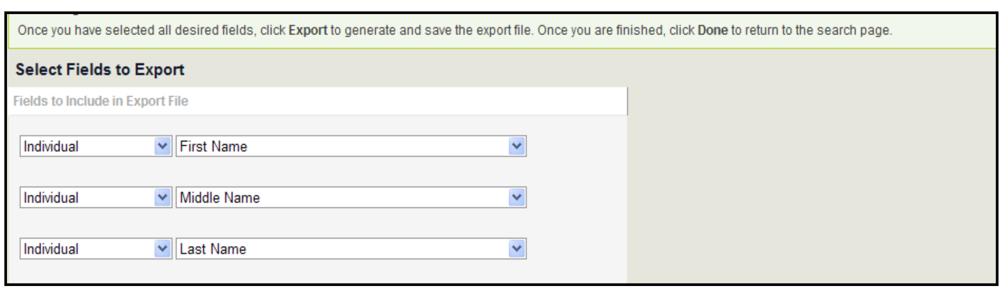


Additional Group for Export

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**.

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 make adjustment to these fields or scroll down to the bottom of the page and click **Export**.



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: trying to save/edit a contact record and when trying to add an Issue Code to a contact record via the Tags tab.

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 Anyways, Reload Page, or View Modified Contact in New Window

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.

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**.)

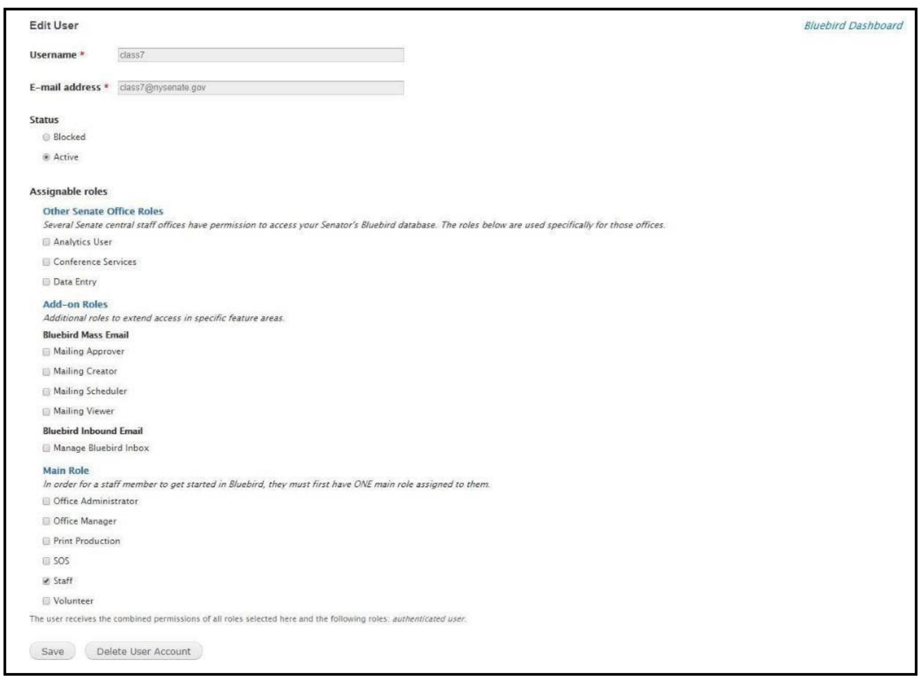
Setting Permissions

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, select one main role for the user then click **Save** at the bottom of the page.



4. When done, click the **Bluebird Dashboard** link in the upper right-hand corner of the screen.