

Election Protection  
**ILLINOIS & INDIANA CALL  
CENTER TRAINING**

**2020 General Election**

# Technology Overview

## The Platforms

- Okta
  - Login system used to access PureCloud and OVL
- PureCloud
  - Phone system
  - Communicate with your team
- Our Vote Live (OVL)
  - Database used to log hotline calls & data

# Your Setup

## Your Setup: Computer



Firewalls & VPNs can cause problems

Personal computers work better than work computers

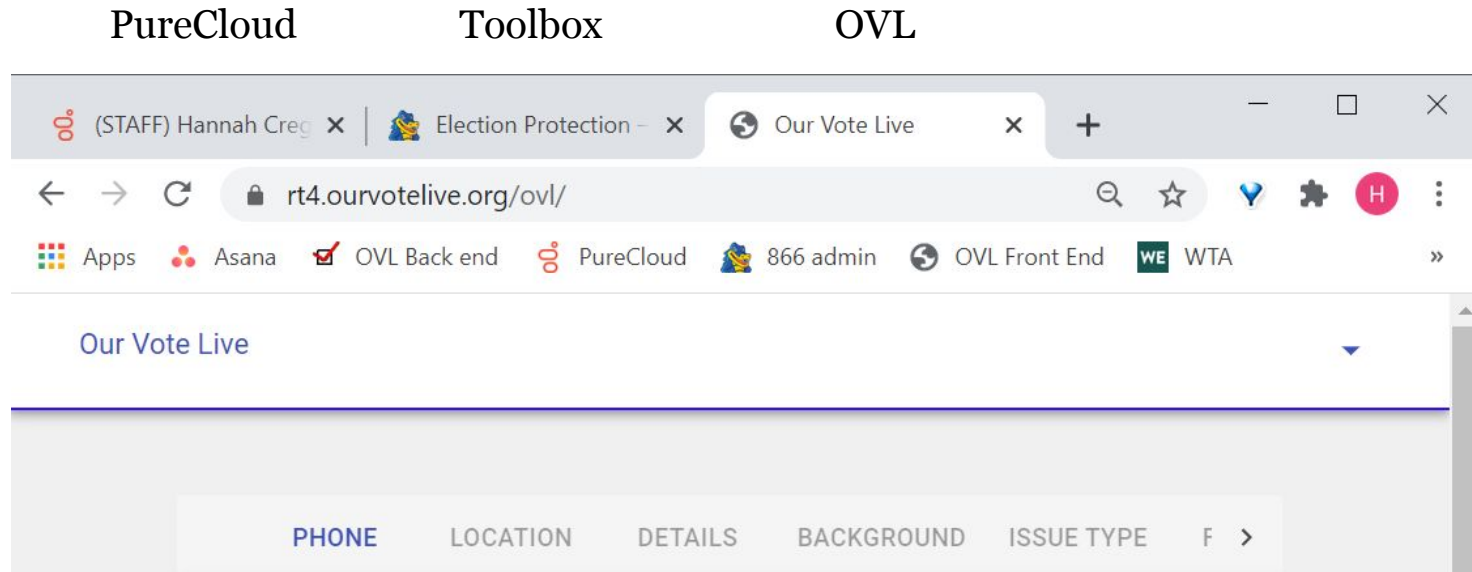
Chrome is the best browser

## Your Setup: Audio



Plug headphones into computer directly, not your docking station

# Your Setup: Tabs or Windows



# Logging In through Okta



First time Okta users will need to:

1. **Create account** in Okta.
2. Access both OVL and PureCloud **via the Okta Elections Protection** homepage.



## Election Protection Volunteers - Welcome to Okta!

Hi \${f.escapeHtml(user.firstName)},

Thank you for signing up as an Election Protection volunteer with the 866 Our Vote hotline.

In order to get access to Our Vote Live, our hotline ticket tool, we have created an account for you in a safe and secure account service called Okta -- this will make it easy to login now and every time you volunteer again.

This email will tell you how to get setup in Okta and ready to create tickets in Our Vote Live during your hotline shift.

---

### YOUR OKTA INFO

Your username is {users email}

Your Election Protection sign in page is: <https://electionprotection.okta.com>

---

### FIRST TIME VOLUNTEERS

If this is your first shift, follow these steps to get started:

1. Activate your account by clicking the button below
2. Create a password and secret question. (Write these down and save them securely)
3. Open OutVoteLive to begin creating tickets

*(Look out for another email with instructions for logging into PureCloud, our hotline calling tool).*

Ready to get started? Click the link below to activate your account.

**ACTIVATE YOUR OKTA ACCOUNT**

## LOGGING IN

electionprotection - Welcome | X

electionprotection.okta....

okta

Welcome to electionprotection, Mollie!  
Create your electionprotection account

1

Enter new password

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, no parts of your username. Your password cannot be any of your last 4 passwords.

Repeat new password

2

Choose a forgot password question




What is the food you least liked as a child? ▼




Answer




3




Click a picture to choose a security image

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.









Create My Account

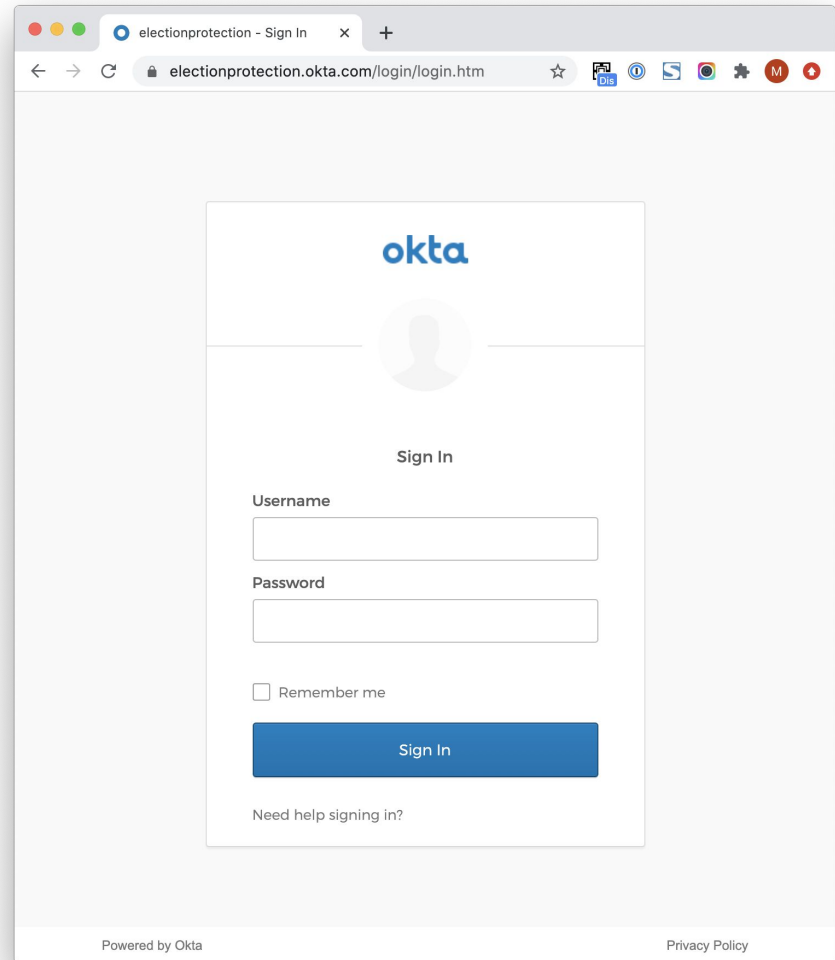
© 2020 Okta, Inc. Privacy Status site

Feedback Mobile Version Help & Feedback

## LOGGING IN

Return Okta users will be use this same account to login to the Okta Elections Protection homepage to access OVL and PureCloud.

Okta Elections Protection homepage:  
[electionprotection.okta.com](https://electionprotection.okta.com)



The screenshot shows a web browser window with the title "electionprotection - Sign In". The address bar displays "electionprotection.okta.com/login/login.htm". The page features the Okta logo at the top, followed by a placeholder for a user profile picture. Below this is the "Sign In" heading. The form includes two input fields: "Username" and "Password". A checkbox labeled "Remember me" is positioned below the password field. A blue "Sign In" button is located at the bottom of the form. A link for "Need help signing in?" is provided below the button. The footer of the page contains the text "Powered by Okta" on the left and "Privacy Policy" on the right.

okta

Sign In

Username

Password

☐ Remember me

Sign In

Need help signing in?

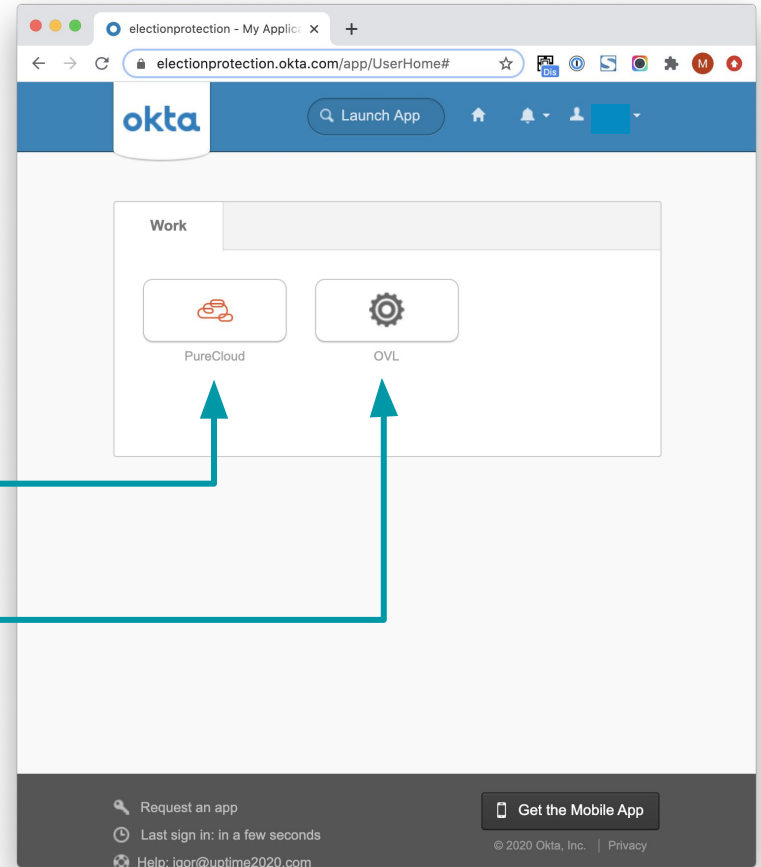
Powered by Okta

Privacy Policy

## LOGGING IN

PureCloud

OVL



## Important tips: Okta

- If you cannot find your activation email, email [volunteer@866ourvote.org](mailto:volunteer@866ourvote.org) to have it resent
- You should *only* access PureCloud and OVL via Okta. Do not go directly to the sites without signing in to Okta first
- All tech problems should be addressed in the PureCloud chat but if you cannot access PureCloud, email [volunteer@866ourvote.org](mailto:volunteer@866ourvote.org) for help

# PureCloud

## OVERVIEW

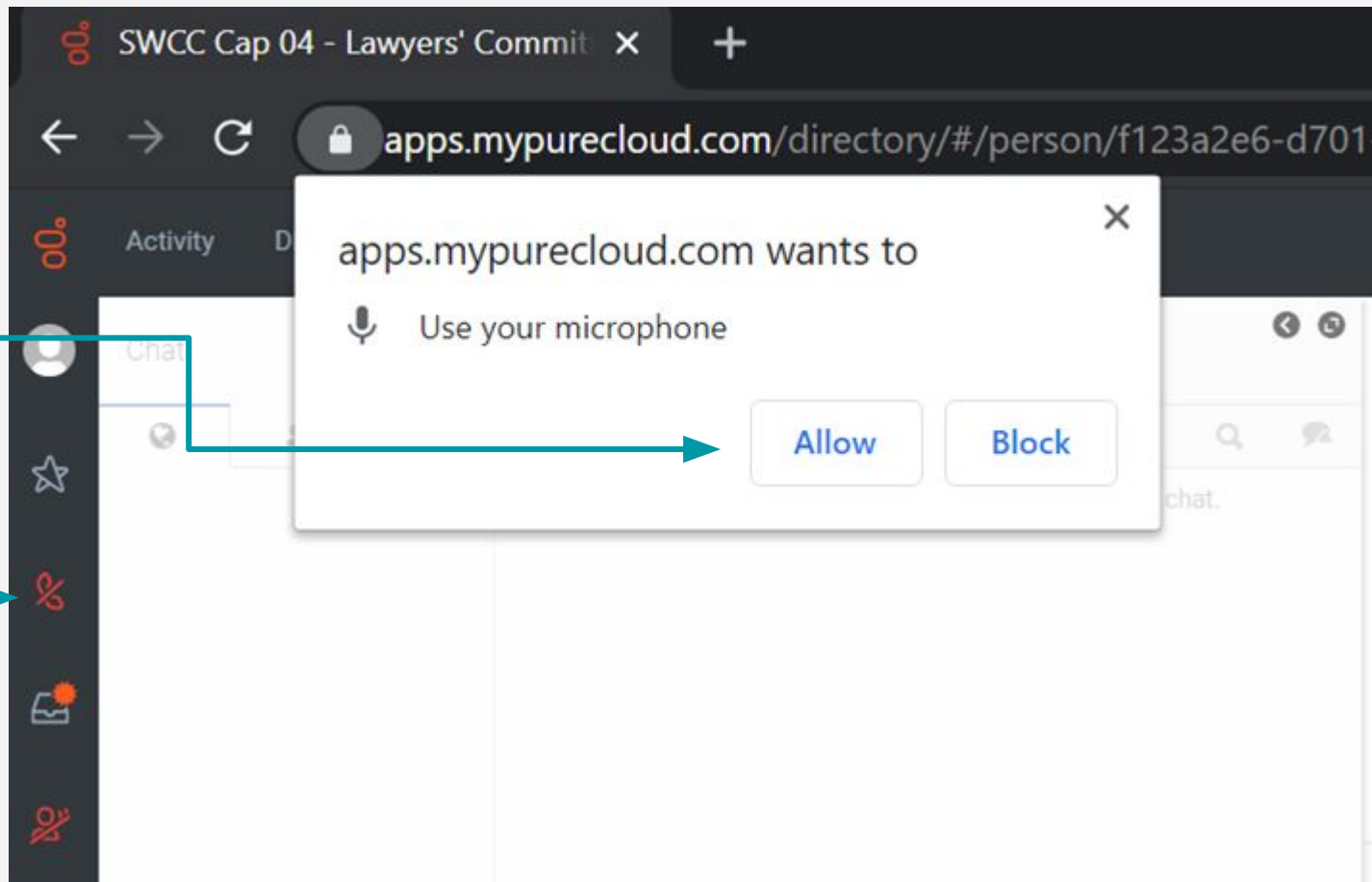
# What is PureCloud?

- Online phone system
  - Accessed in your browser through the Okta homepage
  - Where volunteers access incoming calls, texts, web chats from voters
- Communication/chat platform for your EP team
  - Shift chat allowing you to talk to your captain and fellow volunteers
  - Tech chat to help with any tech problems that come up
  - Direct message anyone on your team, including your captain



# PureCloud SETUP

You must allow  
PureCloud to use  
your **microphone**;  
you do not have to  
share location



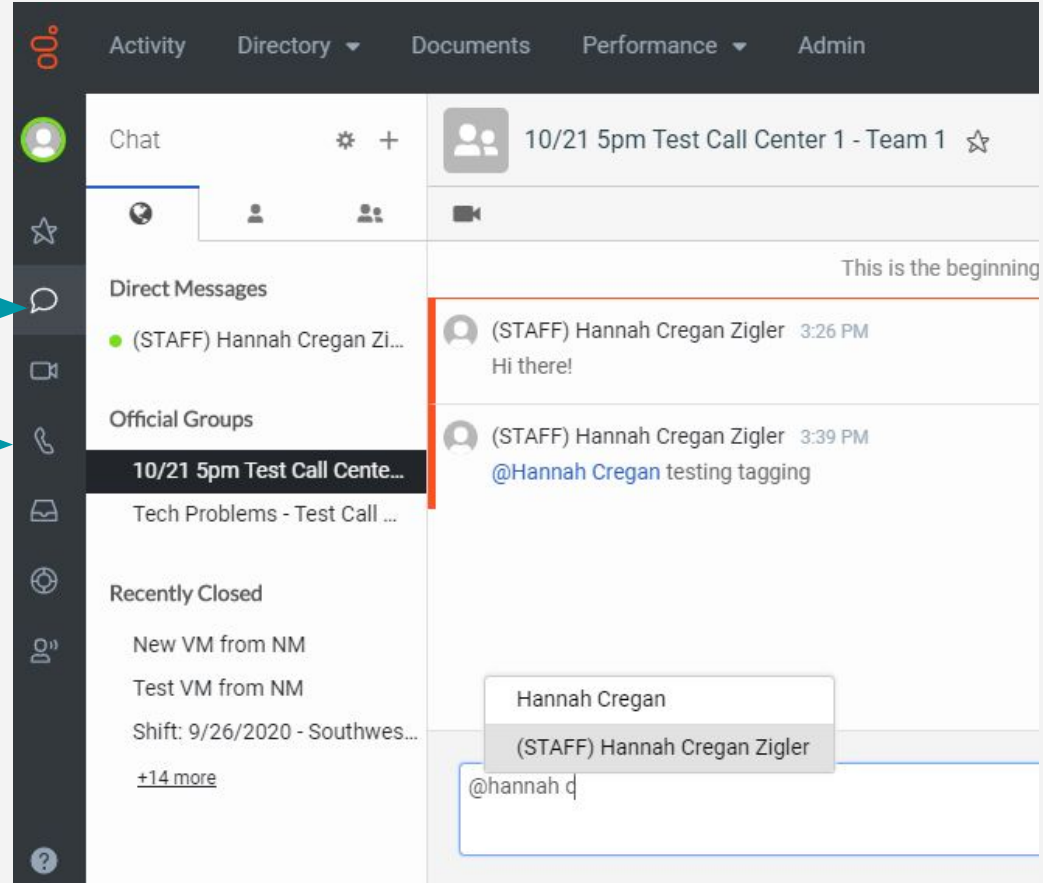
**Red phone icon**  
indicates sound is  
not set up properly.  
Message the tech  
chat for help.

Volunteers don't need to access the pages in the top menu bar; they're for captains

**Chat tab** shows you all the messages from your captain and fellow volunteers

Phone tab. Phone icon must be white but **do not use this** to make calls

**Interactions tab** is where you will see your calls and other interactions with voters. You can also make outgoing calls here.



# PureCloud

## THE CHAT

## Chat basics

- Communicate with captains and other volunteers
- Get tech help
- Can DM or use group chats

Activity Directory Documents Performance Admin

View Public Profile

Available

Washington, District of Columbia

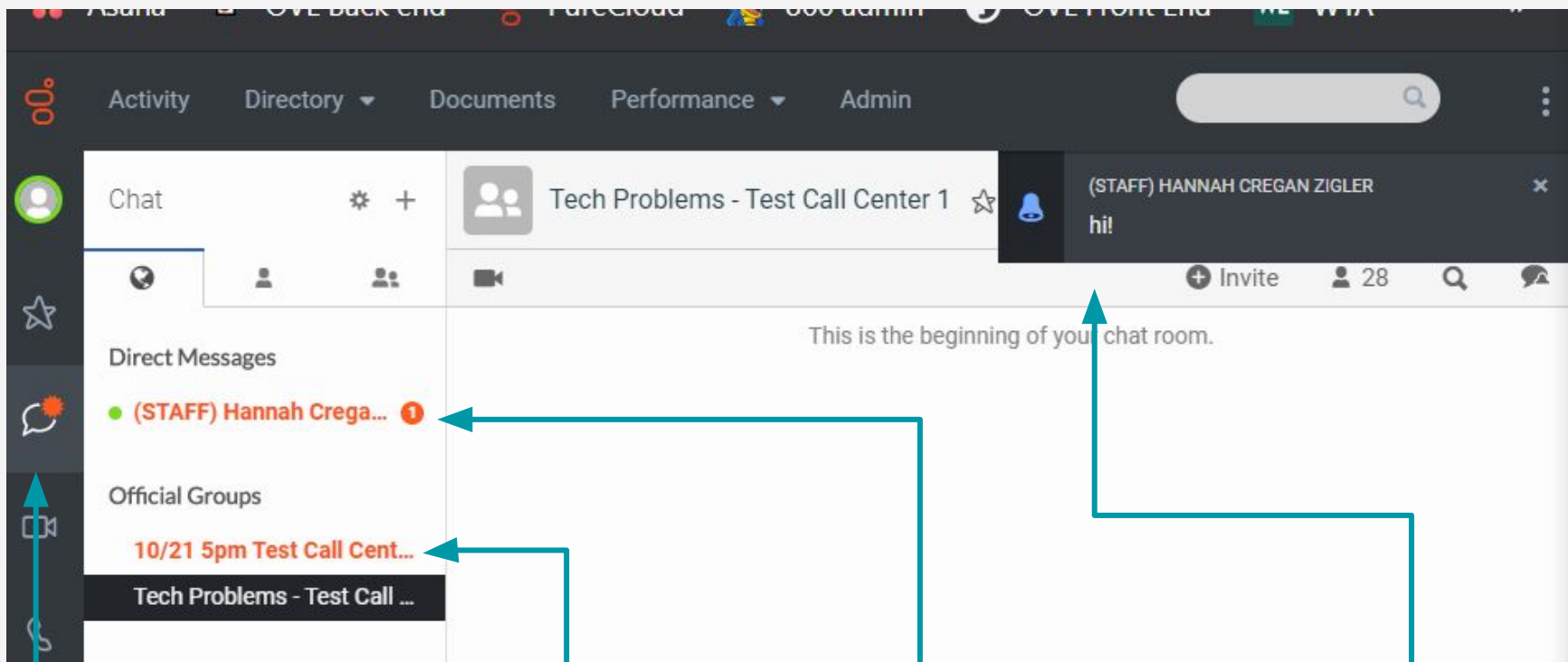
Hannah Cregan

What's on your mind?

+ Add new section

Open or  
minimize chat



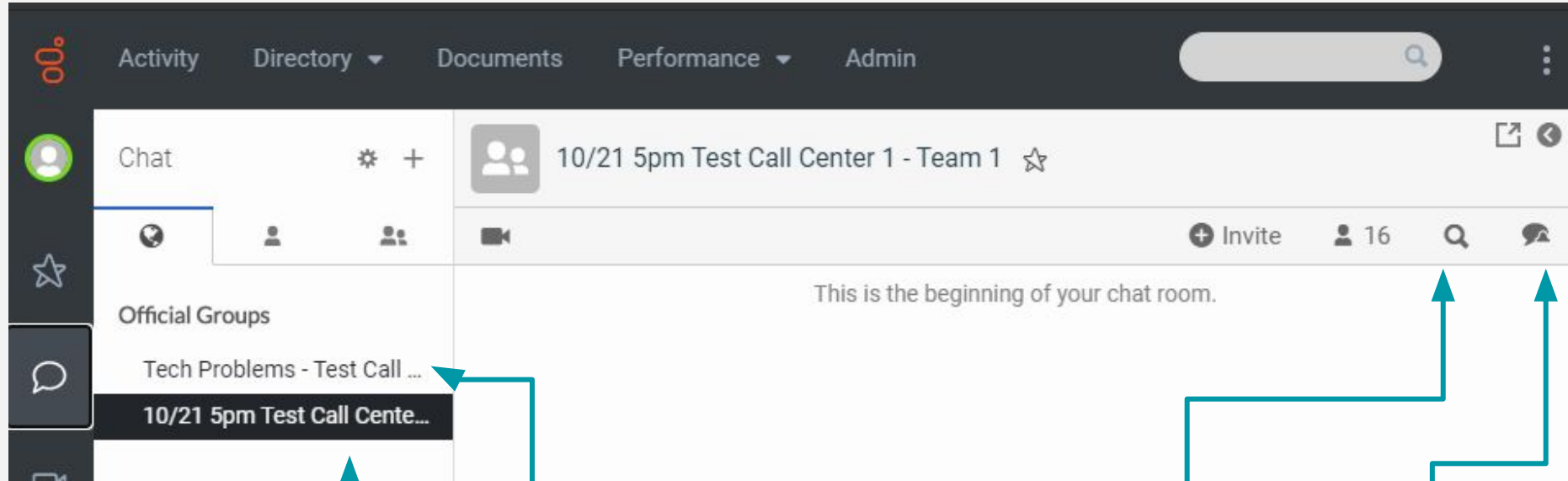


Orange dot  
indicates unread  
chat message

Bolded orange  
indicates unread  
message in group  
chat

Orange number icon indicates  
unread direct message or that  
someone tagged you in a  
group chat

Pop up banner  
when you receive  
a new chat



### **SHIFT CHAT**

Main chat. Use to talk to your captain and fellow volunteers

### **TECH CHAT**

Use to get help troubleshooting any tech problems with OVL, Okta, or PureCloud

### **SEARCH**

Searches chat history

### **POPOUT**

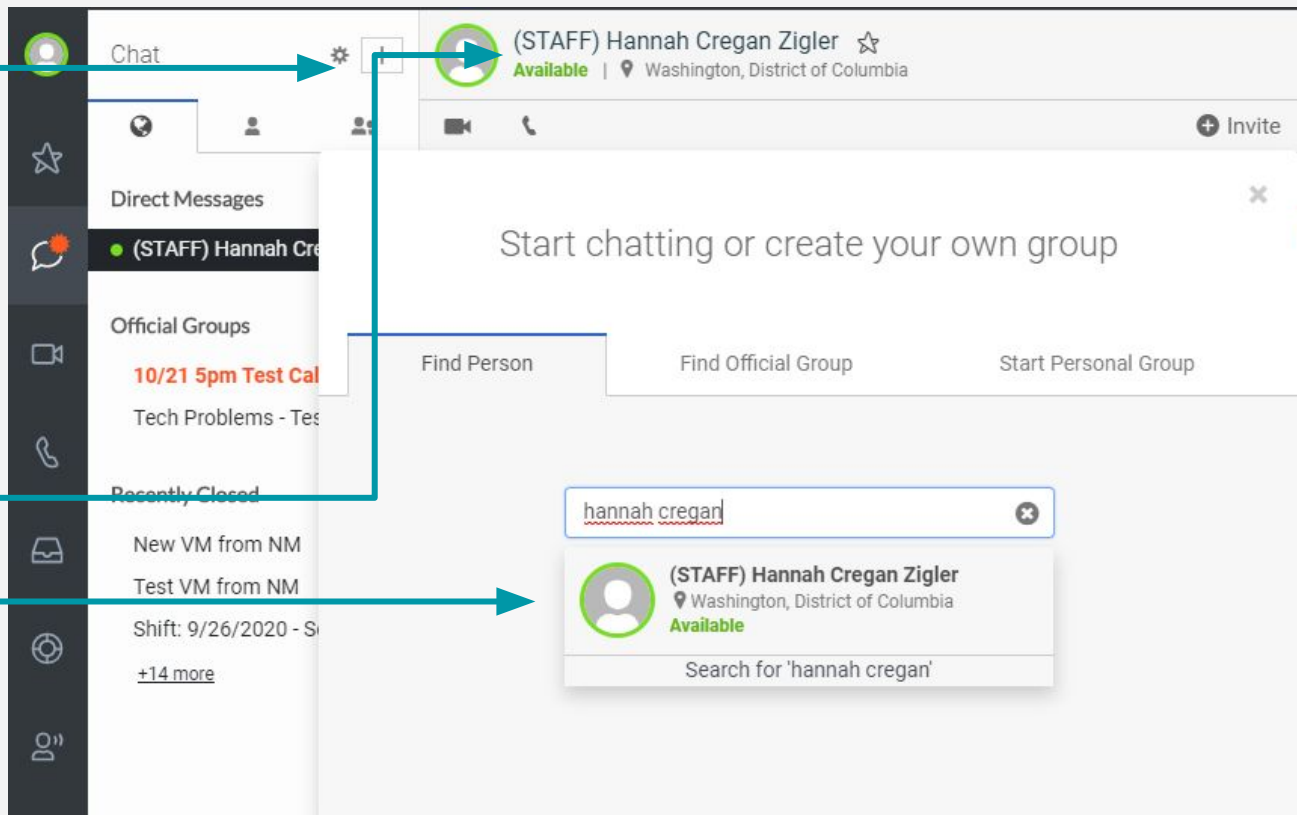
Opens chat in a separate window



To message someone privately, click the plus button to begin a **direct message**

Everyone's accounts have a label to indicate what type of user they are. **Captains** have (CAP) before their name

**Search** their name and select them from the dropdown to open your direct messages with that person

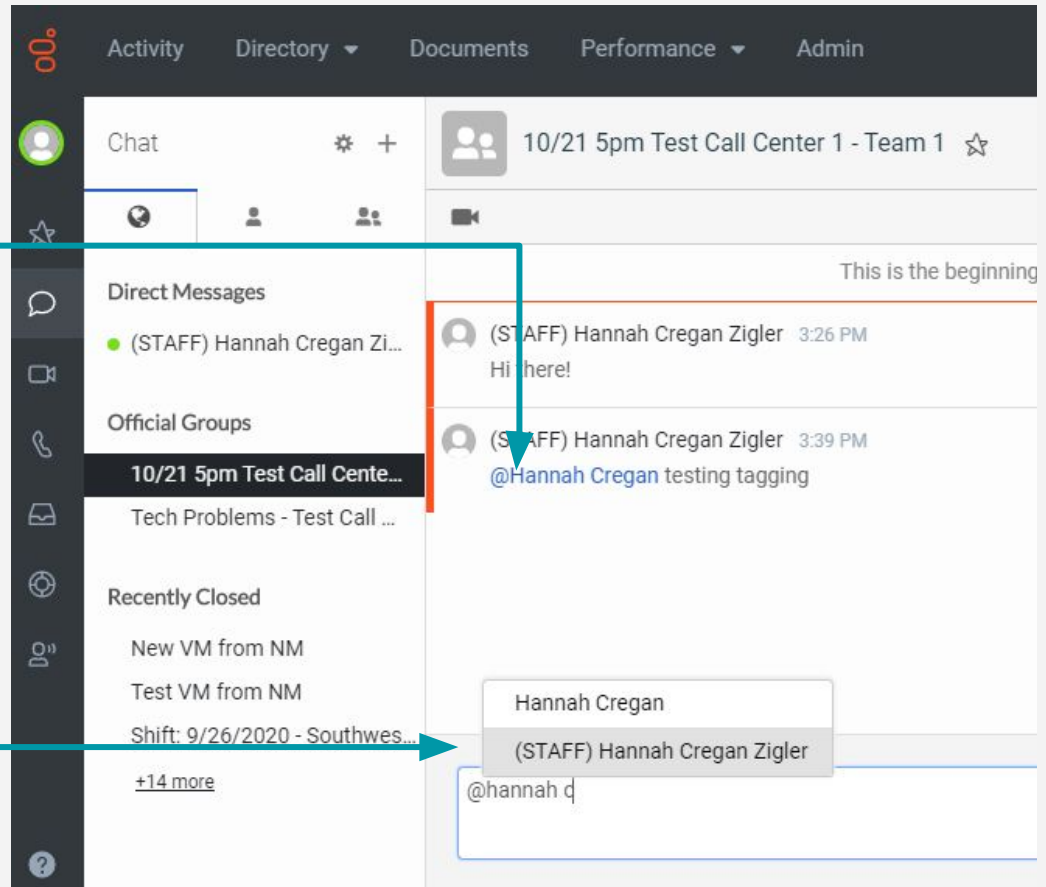


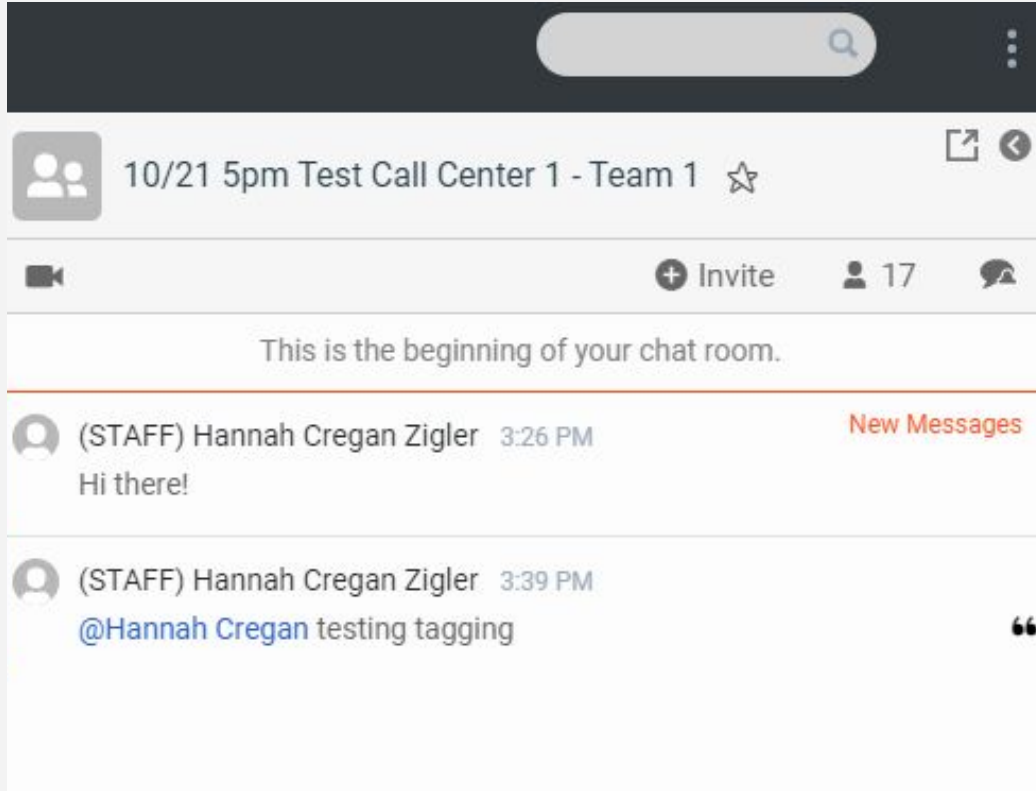
## Important tips: Your chats

- *Shift chat* is your main chat. Post here if you're unsure
- *Tech chat* is only for tech troubleshooting. Do not post PureCloud or OVL tech questions in the shift chat
- *Direct Message (DM)* your captain if discussion is not relevant to the whole group

**Tagging** someone sends them an alert that they've been mentioned in a group chat

**To tag someone** type @ and then their name. Select the correct person from the dropdown





If you want to respond to a specific chat **quote chat** by hovering the right side of the message you want to respond to and clicking the quotation marks

This is the beginning of your chat room.

To: ☒ 10/21 5pm Test Call Center 1 - Team 1 ☐ (STAFF) Hannah Cregan Zigler

@Hannah Cregan testing tagging


shift + enter for new line

quote response

**\*\*bold\*\*** *\_italic\_* ~~strike~~ ?

Type your response in the popup and hit enter

This is what a quote chat looks like in the thread

 Hannah Cregan 3:42 PM

[Edit](#)

@(STAFF) Hannah Cregan Zigler said at 3:39 PM in 10/21 5pm Test Call Center 1 - Team 1

@Hannah Cregan testing tagging

quote response

## Important tips: Chat

- Group chats should be used when info is relevant for everyone
- Tagging is the best way to get someone's attention in a group chat
- Quote chat when continuing a conversation

# PureCloud

## GOING ON QUEUE

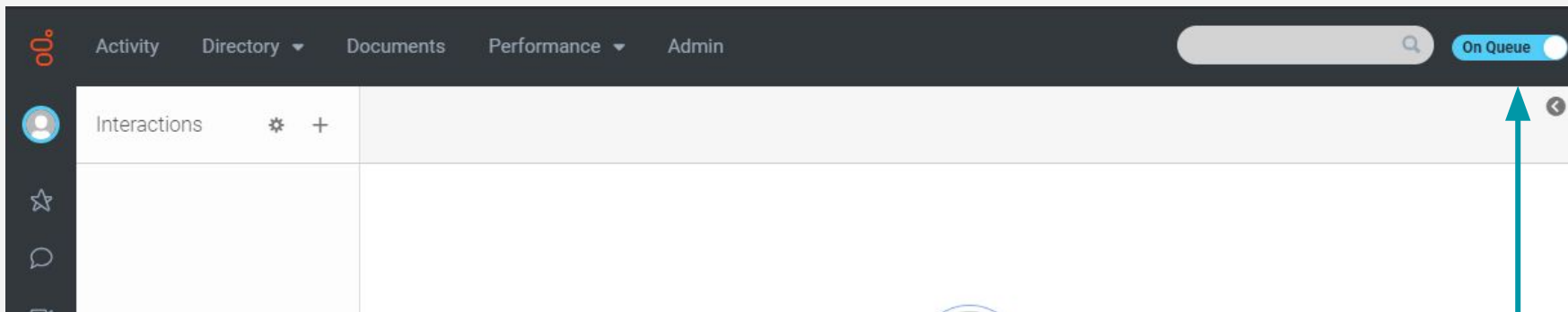
## Queue basics

- On queue = available to take calls and interactions
- You can put yourself on queue when ready to take calls and take yourself off if you aren't
- Move yourself off queue and alert your captain if you need a break
- *Available* status is different than *On Queue* status



## Incoming calls

1. Call comes in
2. Routed to a random on queue volunteer who is *not* already on a call
3. The volunteer accepts the call
4. If they decline or miss the call, the call is routed to another free, on queue volunteer



**Toggle** for going on or off queue.  
**Blue/on queue** means you're free  
to take incoming calls. **Grey/off**  
**queue** means you cannot take  
incoming calls

**Available status (green)** does not mean you are on queue, just that you are online

You must be **on queue (blue)** to receive incoming calls

The screenshot shows a user profile interface for Hannah Cregan. At the top is a dark navigation bar with links: Activity, Directory, Documents, Performance, and Admin. On the left is a dark sidebar with icons for status, favorites, chat, video, phone, and settings. The main content area displays the user's profile with a placeholder for a profile picture, name, and location. Below the profile is a status selection menu with options: Available, Busy, Away, Break, Meal, Meeting, Training, and On Queue (which is selected and highlighted in blue). To the right of the status menu is a large text input field for a status message. Below that is a call queue section showing the user's name and email, and an 'Activate Queues' button. At the bottom is a footer with links for Out of Office, Preferences, and Logout.

Activity Directory Documents Performance Admin

Available  
Busy  
Away  
Break  
Meal  
Meeting  
Training  
**On Queue** 3m 54s

Hannah Cregan  
Lawyers' Committee for Civil Righ...  
Washington, District of Columbia

What's on your mind?

Hannah Cregan (hannahczcregan@...)

Activate Queues

Out of Office > Preferences Logout

# PureCloud

## ANSWERING CALLS

You will get an **alert** when you have an incoming call. If you are not in the **interactions tab** this alert will appear in the top right of the screen

The screenshot displays a call center software interface. At the top, there are tabs for 'Activity', 'Directory', 'Documents', and 'Performance'. The main area is divided into two sections. On the left, the 'Interactions' tab is active, showing a call from 'Oakland CA' with the number '+1 510-813-7776'. The call duration is '0:14' and the time remaining is '0:02'. There are 'Answer' and 'Decline' buttons. On the right, the 'Interaction Details' section shows the following information: Interaction Type: Call, Interaction State: Incoming, Queue Name: DC Call Center, and Customer's Number: tel:+15108137776. A search bar is also visible with the text '+1 510-813-7776' and a search icon. A sidebar on the left contains various icons, including a person icon with a green dot, which is highlighted by a red arrow from the text on the left.

Activity Directory Documents Performance

Interactions

Oakland CA  
DC Call Center

0:14  
0:02

Answer Decline

Interaction Details

+ Create New Profile

Locate and verify profile

+1 510-813-7776 x

No results

No matching search results

Interaction Type:  
Call

Interaction State:  
Incoming

Queue Name:  
DC Call Center

Customer's Number  
tel:+15108137776

The screenshot displays a CRM interface with a sidebar on the left containing icons for various functions. The main area is divided into three sections: a top header, a central list of interactions, and a right-hand details panel.

**Header:** The top header includes the word "Interactions" on the left, a settings gear icon, and a plus sign. On the right, it shows a profile for "Oakland CA" with a phone icon and the number "+1 510-813-7776".

**Interaction List:** Below the header is a list of interactions. The first interaction is highlighted in a dark blue row. It shows a green phone icon, the text "0:46", and the word "Connected". Below this, the text "DC Call Center" is visible. A mouse cursor is hovering over this row.

**Interaction Details Panel:** To the right of the list is a panel titled "Interaction Details". It contains the following information:

- Interaction Type:** Call
- Interaction State:** Connected
- Queue Name:** DC Call Center
- Customer's Number:** tel:+15108137776

**Search and Profile Section:** To the right of the details panel is a section titled "Locate and verify profile". It includes a search bar with the text "+1 510-813-7776" and a magnifying glass icon. Below the search bar, it says "No results" and "No matching search results".

**Annotations:** Five blue arrows point from text labels on the left to specific elements in the interface:

- An arrow points from "Length of call" to the "0:46" duration.
- An arrow points from "Green indicates you are currently talking to someone and they are not on hold" to the green phone icon.
- An arrow points from "Type of interaction (call, text, etc)" to the word "Call" in the details panel.
- An arrow points from "Green bubble indicates you are currently on a call" to a small green bubble next to the "DC" icon in the sidebar.
- An arrow points from "Caller's phone number" to the "tel:+15108137776" number in the details panel.

**Length of call**

**Green** indicates you are currently talking to someone and they are not on hold

**Type of** interaction (call, text, etc)

**Green bubble** indicates you are currently on a call

**Caller's phone number**

The screenshot displays the PureCloud interface during an active call. On the left, a sidebar contains navigation icons. The main area is divided into three sections: a top header, a middle call control bar, and a bottom details section. The header shows the contact name 'Oakland CA' and phone number '+ 510-813-7776'. The middle bar contains icons for muting, holding, transferring, and ending the call. The bottom section, titled 'Interaction Details', includes a 'Dialpad' button and a 'Profile' button. Annotations with arrows point to these specific features.

**Mute yourself**





**Put the caller on hold**

**Dialpad** to create a conference call. Put the current call on hold, click the dialpad and enter the number, and you will be put on a three-way call when the parson picks up

**End call**

**Transfer call.** Click this icon and select the person in PureCloud you want to send the call to

**End the call**

<div>Hold</div> 	<ul style="list-style-type: none"> <li>To place one of the participants on hold, select the <b>Hold</b> icon beside that participant. While on hold, you and the other participant cannot hear the held participant. The held participant cannot hear you or the other participant and instead hears hold music.</li> <li>To connect all three participants in a conference call by transferring, clear all <b>Hold</b> icons.</li> </ul> <p><b>Note: You cannot hold both participants at the same time.</b></p>
<div>End Call</div> 	<ul style="list-style-type: none"> <li>To stop the transfer and disconnect the intended transfer recipient, select the <b>End Call</b> icon beside the intended recipient.</li> <li>To disconnect the original call, select the <b>End Call</b> icon beside the original call.</li> </ul>
<div>Transfer</div> 	<p>Transfer the call to the intended recipient. After the call transfers to the intended person or queue, PureCloud sends you into <a href="#">after call work</a>.</p>
<div>Mute</div> 	<p>Mute yourself so the other participants cannot hear what you are saying. Other participants can hear the other participants.</p>



Washington MD

DC Call Center

0:00

1:56

Interaction Details

Interaction Type:  
Call

Interaction State:  
Disconnected

Queue Name:  
DC Call Center

Customer's Number:  
tel:+13013268069

Wrap-up Codes

After Call Work 1:56

Find wrap-up code

Alabama

Alaska

American Samoa

Arizona

Arkansas

California

Colorado

Connecticut

Delaware

Florida

Georgia

Guam

Hawaii

Idaho

Illinois

Indiana

After a call ends, you get two minutes from the **after work timer** where you will not receive new calls. If you need more time, take yourself off queue

To close out the interaction, select the **wrap up code** for the caller's state and hit done at the bottom of the page. This will end the after work timer.

## Important tips: Answering calls

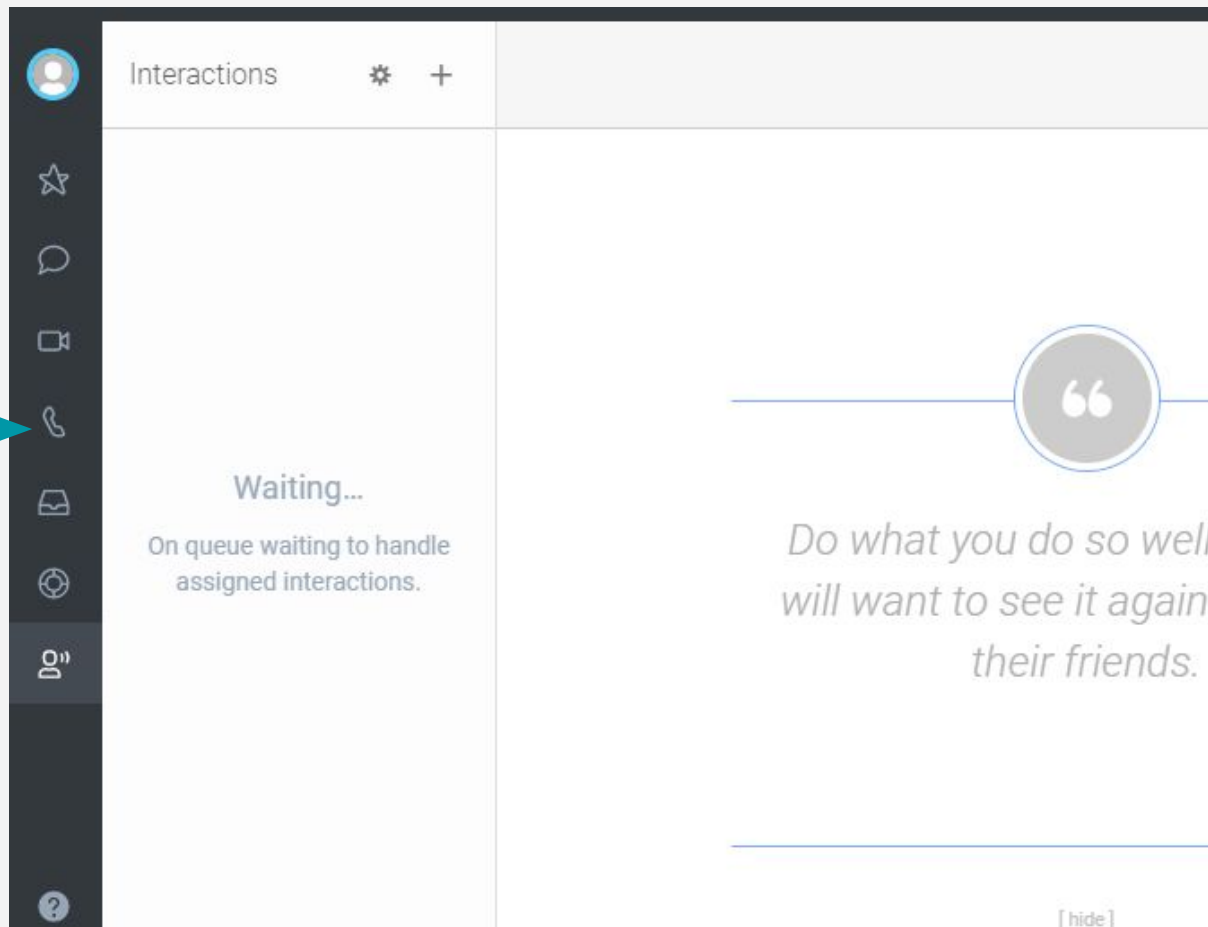
- Don't be afraid to put someone on hold so you can get them the correct information
- If you miss a call, it will bounce to the next available volunteer
- Switching between tabs or windows will *not* end the interaction
- After work countdown timer pauses calls for two minutes after you hang up. If you need longer to enter information into OVL, take yourself off queue.

# PureCloud

## MAKING CALLS

Phone tab will make an outgoing call look like spam. **Do not use the phone tab to make outgoing calls.**

**Interactions tab** allows you to take incoming calls and make outgoing calls from 866 OUR VOTE

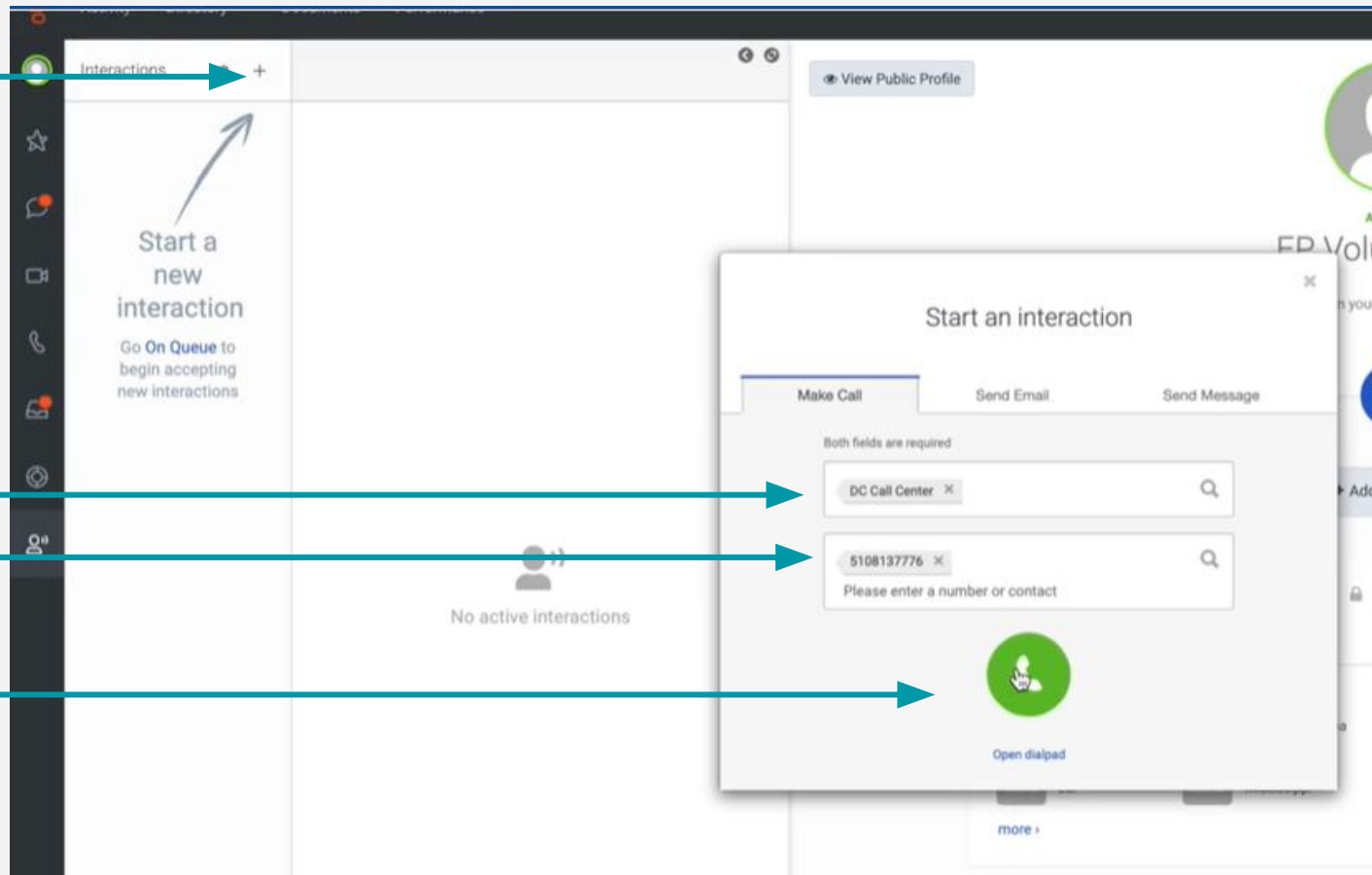


Click the plus to  
**start a new call**

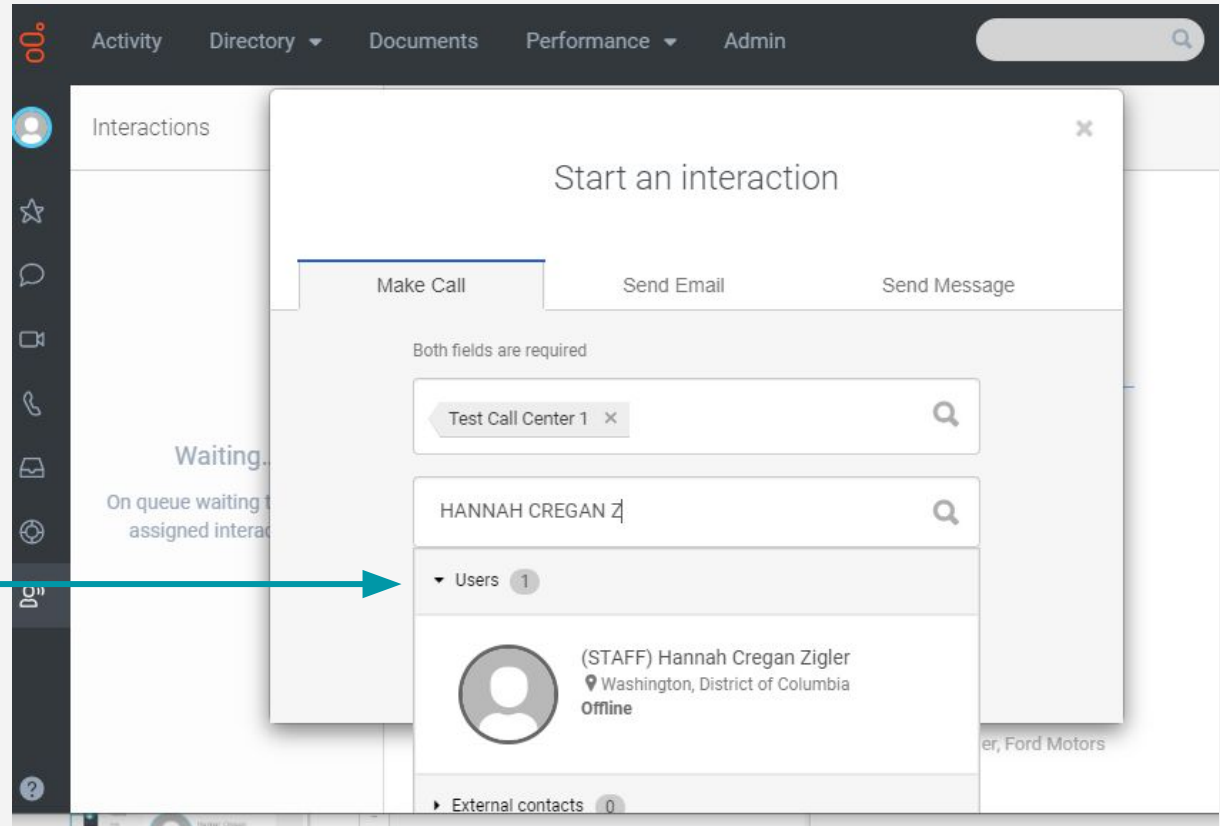
Type in your  
**queue** (ask  
your captain if  
unsure)

Type **phone  
number** and  
hit enter

**Dial**



To make a call to **someone else in PureCloud**, instead of dialing a number, type their name and select them from the users dropdown



# PureCloud

## NON-PHONE INTERACTIONS

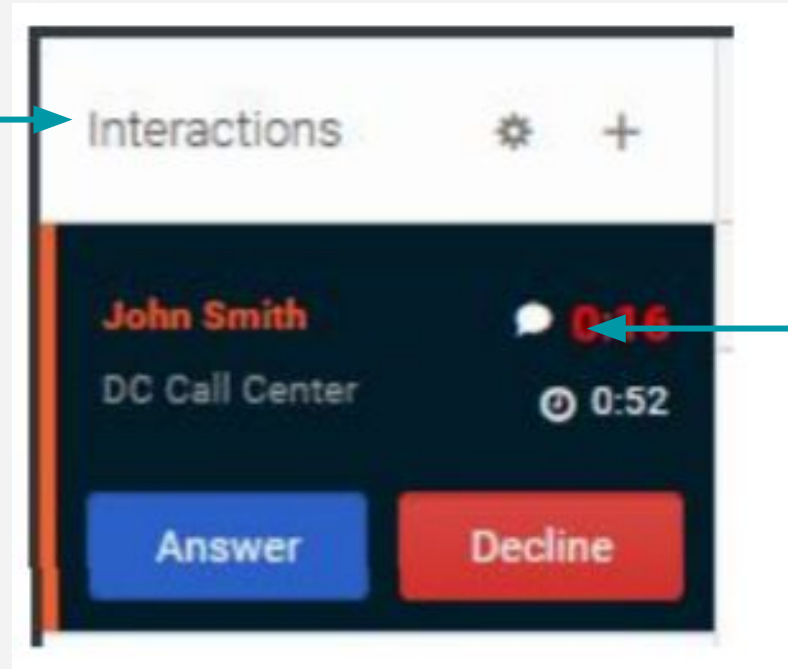
## Non-phone interactions

- ➔ Vast majority of interactions are phone calls, but voters can also contact us in other ways:
  - Web chat on [866ourvote.org](https://866ourvote.org) homepage
  - Texting 866-OUR-VOTE
  - Message EP social media accounts
- ➔ All these will show up as interactions in PureCloud. Responding to them is almost the same as responding to a phone call.



**Alert for an incoming non-phone interaction**

**Person's name**



The **bubble icon** indicates this is a message or text

Interactions ⚙️ +

**John Smith** (3) 0:47  
DC Call Center 0:47  
**Chat**

→ ✍️

This is the beginning of your chat room.

**Workflow** 9:14:56 PM  
Hello John! Thank you for reaching out to the 866-OUR-VOTE Election Protection Hotline Chat, your resource for comprehensive information and assistance at all stages of voting.

**Workflow** 9:14:56 PM  
Your details are as follows:  
Full name: John Smith  
Mobile number: 9999999999  
Zip Code - State: 02138 - Massachusetts  
Inquiry: I am having an issue at a polling place/early voting location - Polling place opened 3hr late  
SMS Opt-in? false

**John Smith** 9:15:29 PM  
hello ago

EP Volunteer 18 joined the conversation

shift + enter for new line

TYPE YOUR MESSAGES HERE

After accepting the interaction, you will be given a summary of the information they've already entered including **name, phone number, zip code, and their issue**. This information is also listed in the right-hand column (not pictured)

Washington MD

DC Call Center

0:00

1:56

Interaction Details

Interaction Type:

Call

Interaction State:

Disconnected

Queue Name:

DC Call Center

Customer's Number

tel:+13013268069

Wrap-up Codes

After Call Work1:56

Find wrap-up code

Alabama

Alaska

American Samoa

Arizona

Arkansas

California

Colorado

Connecticut

Delaware

Florida

Georgia

Guam

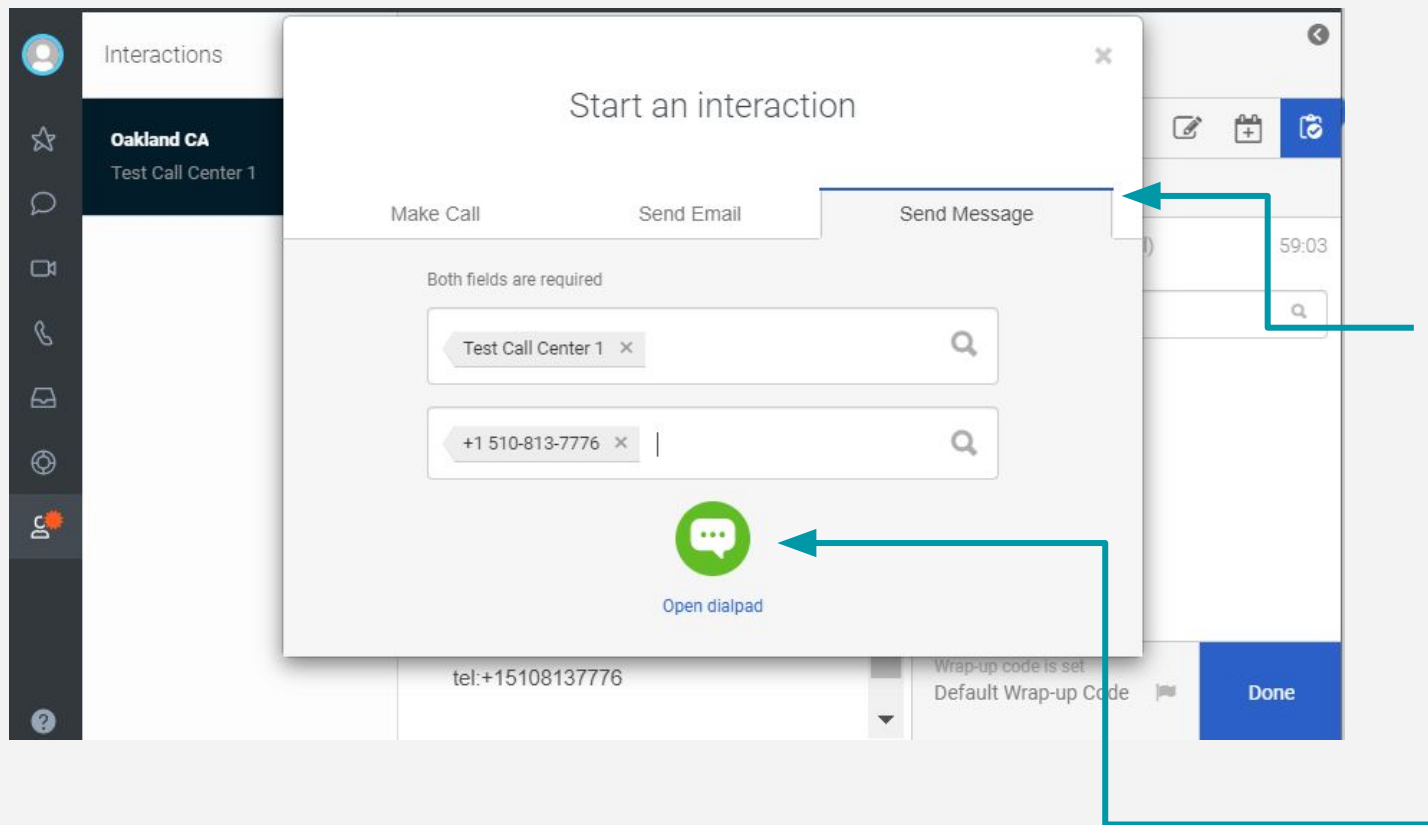
Hawaii

Idaho

Illinois

Indiana

To begin receiving calls again you must **end the interaction** the same way you do a call and choose the **wrap-up code** for the correct state (note: screenshot is of phone interaction)



To **send a message**, start an interaction with the plus sign, go to the send messages tab and continue as you would if you were making a call

Hitting the green icon will open up the interaction and you can **draft and send** your message

## Important tips: Texts and messages

- Works essentially the same as calls
- Especially important to give good info and remain non-partisan because there's a written record
- Always remember to **end all your interactions** and pick a wrap up code
  - ◆ You may not get calls until you end it
  - ◆ If they contact us again the interaction will reopen for whichever volunteer takes

# PureCloud

## DOCUMENT CENTER

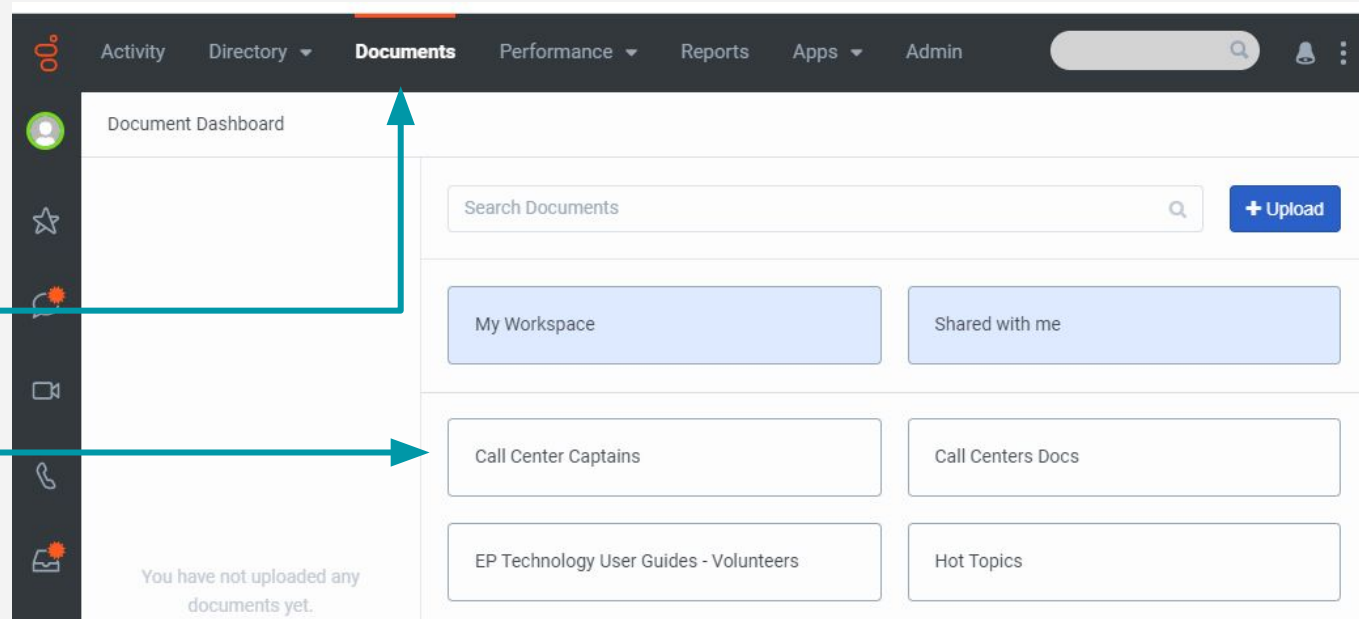
## Document Center

- PureCloud page where documents can be uploaded and accessed
- The toolboxes are your main reference materials. You should not need to use the PureCloud document center as long as you have access to your toolboxes
- Things are changing quickly; do not save materials and keep an eye on your shift chat where your captain will post updates

Document center is accessed through the **Documents** page

**Workspaces** are the folders accessible to you.

Open them to access documents.





## PureCloud Checklist

- Are you able to access PureCloud?
- Is your phone icon red or white?
- Try sending a chat
- Try making an outgoing call (ex. to your cell)
- The test call center doesn't have workspaces in the document center, so don't worry about that

*OVL has a separate practice site, ONLY access OVL through Okta while on your shift*

**Our Vote Live**

# Comprehensive Our Vote Live Training Deck

→ Please go to this link for a comprehensive training on OVL

<https://docs.google.com/presentation/d/18YT6R8QA8oARphcl4YqfIJXBDNToU-JzJ-MAl7HoIAM/edit?usp=sharing>

→ If you cannot access it, email [volunteer@866ourvote.org](mailto:volunteer@866ourvote.org) and ask them to send you the PDF version

→ The slide deck also contains a reference chart for all the issue types

# Practice in OVL

This site mirrors the real OVL so you can look around and try creating and editing tickets. You can make as many practice tickets as you'd like. **Do not enter real data in the practice site.**

## Accessing the practice site

URL: [ovl.dev.uptime2020.com/ovl/](https://ovl.dev.uptime2020.com/ovl/)

username: volunteer

password: vote2020now

Notes:

- \*Users must include the "/" at the end of the URL or the page will not load
- If the page takes a long time to load, try copy/pasting the URL into new tab or, if that doesn't work, an incognito window
- Once you've entered this credentials, it may look like the site is loading for while; just re-enter the [ovl.dev.uptime2020.com/ovl/](https://ovl.dev.uptime2020.com/ovl/) URL and you'll see that you're logged in and can proceed.
- If you're taken to the backend practice site, add /ovl/ to the end of the URL and you will be taken to the volunteer practice site

# Resources

## What resources are available?

- Your toolboxes
  - Website with list of links to documents like the state FAQs, useful lookup sites like the polling place lookup, and other information
  - Tech toolbox has links to trainings and resources on Okta, OVL, and PureCloud
  - EXAMPLE Illinois and Indiana toolbox:  
<http://eplegal.wpengine.com/training-toolkit-il-in/>
- Your captain
  - Your best resource!
  - Always try to work through questions yourself but your captain is there to help if you get stuck, want confirmation that information is correct, or think you may need to escalate a ticket

## Tech Troubleshooting Resources

- Tech chat in PureCloud
  - Staffed by trained tech volunteers and staff
  - If you cannot access PureCloud, email [volunteer@866ourvote.org](mailto:volunteer@866ourvote.org)
- Tech toolbox has written guides and reference documents
- Your captain is *not* trained on tech troubleshooting; please direct all tech questions to the tech chat