PADEMS VOTEBUILDER

vANual

CONTENTS

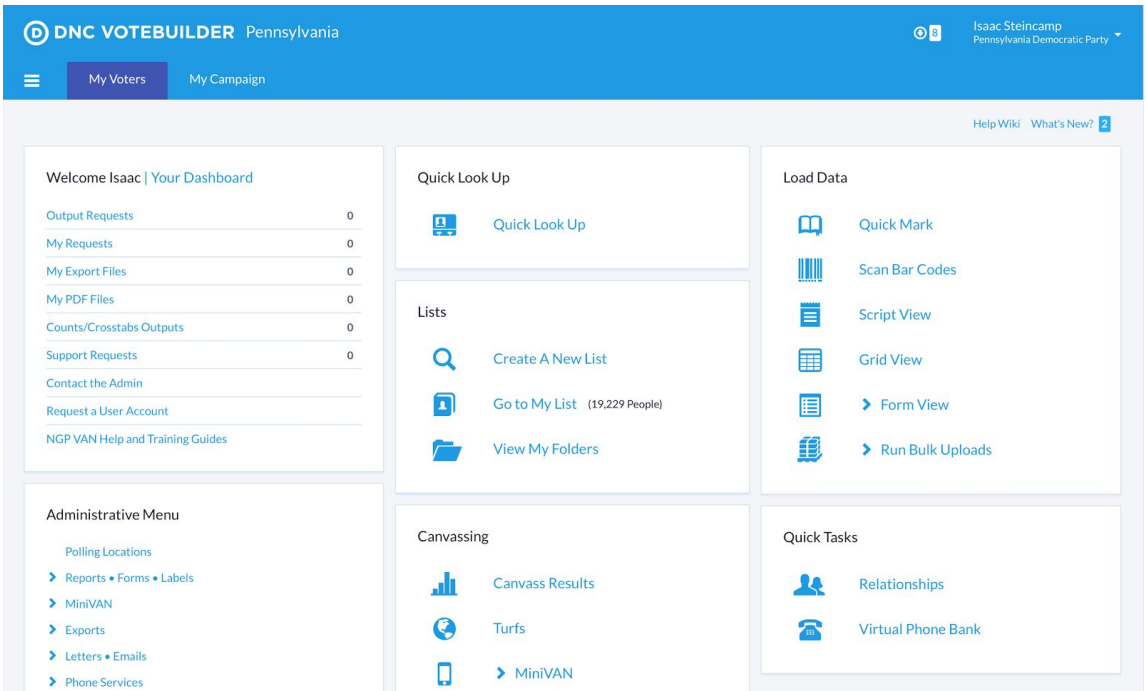
PADEMS

CONTENTS

PADEMS

WHAT IS VOTEBUILDER (VAN)?

The Voter Activation Network (VAN) is an online database that helps us organize campaign and voter data. By storing our data on this platform, we can track information gathered on phone calls and door knocks to generate more effective and data-driven field efforts. These reports guide campaigns and committees, and help them make informed decisions about their targeting strategies.



WHO CAN USE VAN?

Counties have access to VAN free of charge from the State Party (with signed contract), after which they can grant access to municipal chairs, and county committee members. Other individuals who can use VAN are:

- State Committee members and County Chairs
- Young Democrats
- Other activists, per consent of the party

CANDIDATE VAN ACCESS

County parties are only permitted to grant access to county/municipal candidates and must charge at least $.004/registered voter for access through county committee (public account). Municipal candidates

can receive a private account through the Pennsylvania Democratic Party for $.007/registered voter. All statewide, congressional, State Senate, and State House candidates must receive their access through the PA Dems, HDCC, or SDCC.

LOGGING ON

To get login credentials for Votebuilder, you will need a email from your VAN administrator granting you access to the network. By following the link in that email, you will be redirected to VAN to create an Action ID.

> **Remember, never share your VAN Password!** Always keep your login credentials safe and secure.

WHAT IS 'MY VOTERS'?

The 'My Voters' database contains all of the information about voters in the state. The data in this section of VAN comes from the Department of State, and information from third party vendors is added to create a cohesive voter file for each individual. This part of VAN is geared towards voter contact, persuasion, and increasing voter turnout.

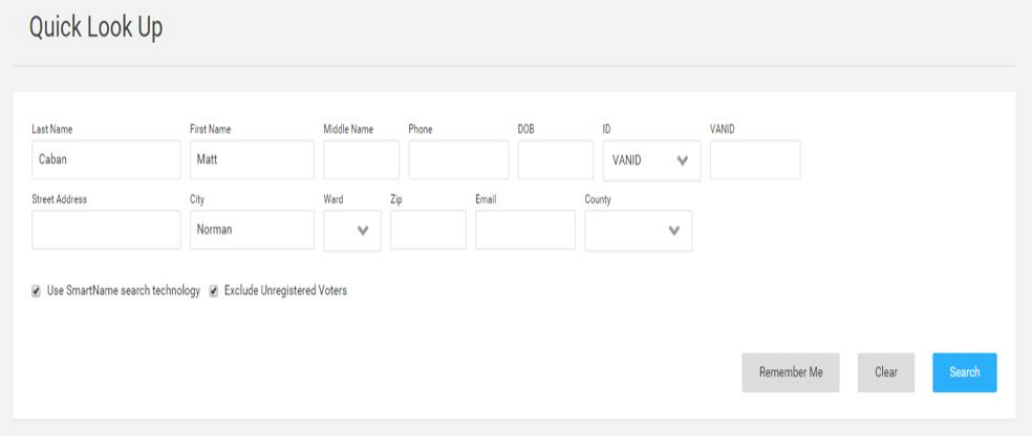
WHAT IS 'MY CAMPAIGN'?

The 'My Campaign' database contains a user/committee created list of volunteers and active supporters. This database is built by the work of staff members and volunteers in the field, and it focuses largely on volunteer management. As such, each committee's version starts as a blank slate with zero volunteers and active supporters.

While some of the users in 'My Campaign' might have come from 'My Voters', these individuals can be added regardless of their registration status. 'My Campaign' can also include individuals who do not live in your district or state, and it can even be a non-citizen.

USING QUICK LOOK UP

Quick Look Up is one of the easiest tools to use in VAN. It allows users to look for an individual using almost any piece of information you have about them. You can search by name, contact information, address, or their VAN ID, which is a unique number assigned to each person in the system.



It is possible to supply too much information when searching for someone. If you aren't able to find the person using their full name, **try a partial name** in case of typos. If we were searching for the name Matt Caban, we might put in "Cab, Ma" instead. The default option to use Smart Name search technology when searching the system helps to include matches to common spelling variations and nicknames, of first names only. *For example, if the first name searched is Bob, it will return all results for Bob, as well as Rob and Robert.*

UNDERSTANDING THE VOTER PROFILE IN 'MY VOTERS'

Every voter listed in VAN has a corresponding voter profile. Any information we have collected about an individual is stored here, and is sorted under various categories. Here are some of the most important categories:

ACTIVIST CODES

Identifies past actions a person has taken. Some campaigns might use this to code someone as a certain type of constituent, supporter, volunteer, and much more.

ALSO IN HOUSEHOLD

Shows if anyone in the current database shares the same address. This doesn't show everyone who actually lives at the address, but the people that are registered to vote at that address. *This information can be out of date.*

CONTACT HISTORY

Shows all attempts data-entered that were made to contact the person, how they were attempted (e.g. door knock, phone), the canvasser who attempted them, and the method in which the data was entered.

VOTING HISTORY

This will display the voting history of each person – **not who they voted for, but when they voted**, and in some cases which party primary they participated in. There will also be codes for the vote method as well, and they are: **P**: At Polls, **E**: Early, **A**: Absentee, **M**: Mail, **Q**: Provisional, **Y**: Vote Method Unknown.

VAN ID

The VANID is a unique number assigned to the current profile, and can be used in the Quick Lookup tool to quickly locate an individual. The 'My Campaign' ID section shows the person's corresponding 'My Campaign' profile, if it is linked, and can be used to navigate between databases. If this person does not have a 'My Campaign' ID, clicking Add to 'My Campaign' will then bring them over.

> **Only people who are going to participate and/or volunteer with the campaign should be added to My Campaign.** The canvasser field shows if the person has been used as a canvasser, and can be used to add them if not.

VITAL STATS

This shows the vital stats of the selected person. It also displays when the person was first registered, as well as their party affiliation (if they have one).

POLLING LOCATION

This shows the voting location for the person, with the address and city/ZIP.

EARLY VOTING

This shows the status of the person's early voting activity - or in Pennsylvania, we call this absentee voting- if they have requested a ballot, have had the application mailed, and if they have returned the ballot. If blank, nothing has been processed. This information is loaded prior to each election.

TARGETING

This shows any targets a specific individual is listed in.

ADDRESS, EMAILS, PHONES

Shows the currently active contact information for the selected person. When using Grid View, the profile must be accessed to enter new information for these three fields.

SURVEY RESPONSES

Survey Responses are one form of tag used to identify past actions/responses a person may have taken/said. Unlike activist codes, these cannot be toggled on and off; all responses are preserved, and the system shows timestamps for each response so we can track how a person may have changed over time.

All profile components begin closed on your first login. Clicking on the plus symbol next to the section name will expand it. Once you start looking for specific areas to be shown, the Save Page Layout button in the Actions section is a function that can save a significant amount of time. It remembers the sections you currently have open along with the sort order, and it will display them open any time you enter a profile.

UNDERSTANDING THE VOTER PROFILE IN 'MY CAMPAIGN'

When using 'My Campaign' to look at individual profiles, there are a lot of similarities. Here are two sections of the profile that may look different or be more useful than when analyzing profiles with 'My Voters':

EVENTS

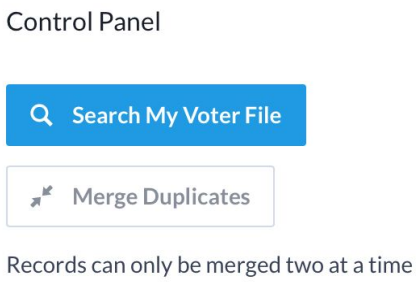
This displays all events that the person was marked as scheduled for, with the date and status of the person scheduled. The events can be clicked on to view scheduling details and modify the status.

SURVEY RESPONSES

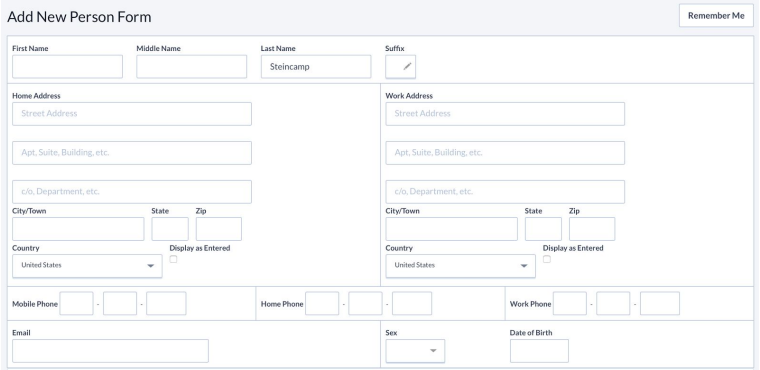
While the survey questions on 'My Voters' are tailored towards voter contact, the survey questions on 'My Campaign' tend to be tailored more towards volunteering.

ADDING VOLUNTEERS TO 'MY CAMPAIGN'

Only people who are going to participate and/or volunteer should be added to 'My Campaign'. As mentioned in the VANID section of the Voter Record section above, there is an option when looking at a person's voter record/profile on 'My Voters' to add them under the VANID section. There is also the option to do this on 'My Campaign' using Quick Look Up. First search to make sure there isn't already a record for him or her on 'My Campaign'. If nothing comes up, use the Search My Voter File option to see if someone matches on that side.



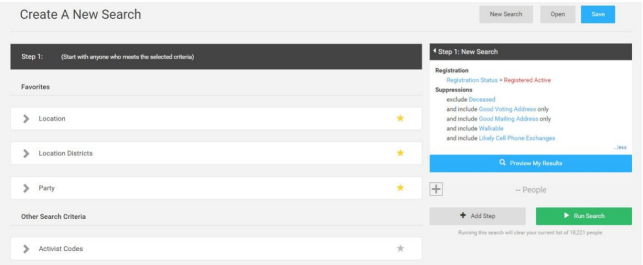
If the person is on ‘My Voters’, you’ll be able to use the “Search My Voter Profile” button to bring them over to ‘My Campaign’. If they aren’t on 'My Voters' because they aren’t registered to vote, just moved, live out of state, are a non-citizen, or some other circumstance, use the Add New Person to start the process of creating a profile (see next page for screenshot).



It is extremely important to fill out as much information as you can, especially an address and phone number. Without an address to geocode them, they will not pull up in location-based searches!

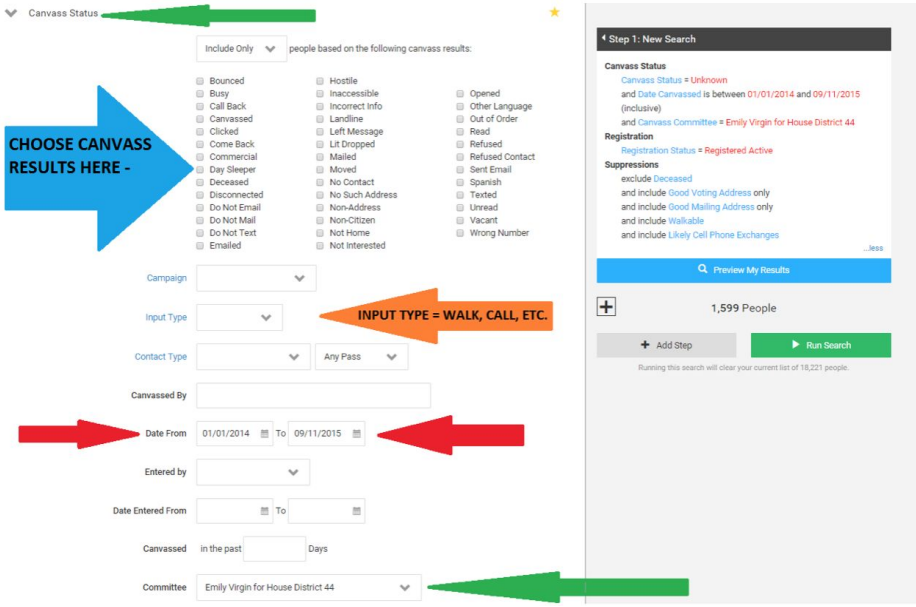
CREATING A LIST

Start on the homepage of ‘My Voters’ to create a voter ID call list, or ‘My Campaign’ to create a volunteer recruitment list. The default for Create a List is to load searchable criteria in alphabetical order, but a user can use the Favorites section by clicking the star next to search criteria to customize the interface for faster searches. The searchable criteria itself includes the information we viewed when we used Quick Look Up and visited a voter record.



For this example, we’ll use the **Canvass Status** section to create a list of people who were attempted by a canvasser from January 1, 2014 to September 11, 2015 by our committee. Start by using **Include Only** in the first section. If we were looking for a certain response (like Not Home), we would click on that to narrow to a specific thing. Since we are looking to pull everyone who was attempted, we want to click nothing in this section so that any response will be pulled. The **Input Type** involves the method in which the data for this type of contact was entered. **Contact Type** involves the method in which they were canvassed. **Canvassed By** is a way to narrow to a specific individual that attempted them. **Date From**

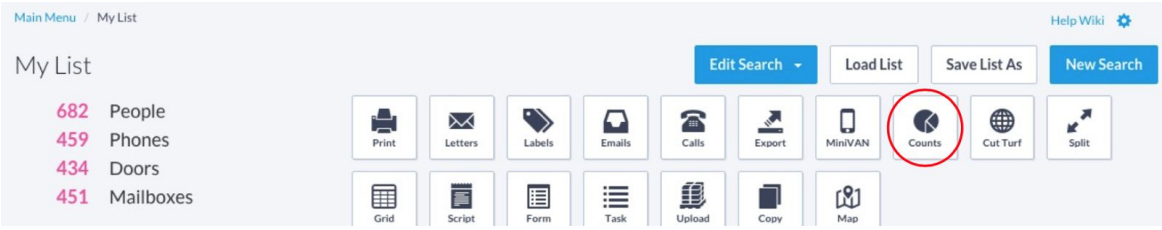
let's you look at attempts within a certain range of time, while **Canvassed in the past __ Days** looks at a range of time like a week or month. **Committee** narrows to a certain campaign, like Emily Virgin for House District 44 or Cleveland County Democrats for example.



Suppressions: The default is to only pull individuals who have a Good Voting Address. For this example in order to see a full count of everyone, we need to click Remove All Suppressions to include those who were attempted but were identified at that time as having a bad address or being deceased.

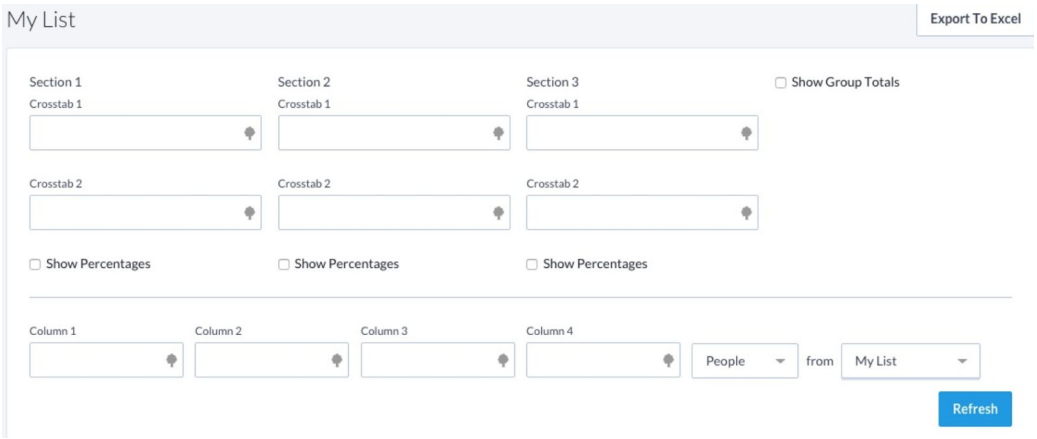
After selecting all of the fields for your search, **Preview My Results** to quickly check what the number of people, phones, doors, and mailboxes would be. There is the option on this screen to use **Add Step** to narrow this list further, remove a certain group of people, add people, and much more. Once the search criteria has been finalized, click **Run Search** to actually create this list of people.

COUNTS AND CROSSTABS



Counts and Crosstabs is a powerful tool for reporting analytics. It provides a snapshot of a voter population from either "My List" or all of the voters available to a user in the My Voters tab, using defined criteria like ethnicity, district, or party affiliation, among others. The data tables that feed Counts and Crosstabs are updated and regenerated overnight.

To access Counts and Crosstabs, go to “My List” and click Counts then “run quick counts and crosstabs”. This will take you to the Counts and Crosstabs screen.



To create your table, you can choose your criteria before exporting to Excel (top right). This will break down your list into different subcategories like age, ethnicity, location, voting history, etc. Here is a sample table from Counts and Crosstabs.

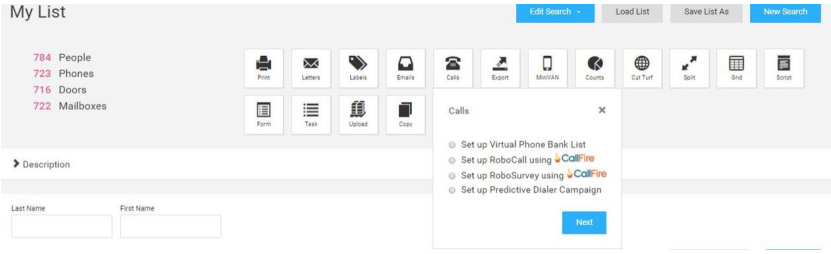
		Party					
Age	General Voting	Democrats	Republicans	Other	Independent	Unknown	Total People
18 to 30	0 of 3	167	86	6	111	0	370
18 to 30	1 of 3	88	83	2	71	0	244
18 to 30	2 of 3	26	14	1	7	0	48
18 to 30	3 of 3	0	1	0	1	0	2
31 to 45	0 of 3	6	1	0	1	0	8
31 to 45	1 of 3	1	0	0	0	0	1
31 to 45	3 of 3	1	0	0	0	0	1
46 to 61	1 of 3	1	0	0	0	0	1
46 to 61	2 of 3	0	0	0	1	0	1
46 to 61	3 of 3	1	0	0	0	0	1
62+	0 of 3	0	0	0	2	0	2

WHAT IS A VIRTUAL PHONE BANK (VPB)?

A Virtual Phone Bank (VPB) allows users with a computer/tablet and an Internet connection to use Votebuilder (VAN) and make calls from a list you’ve created and saved. Each user using the VPB will be

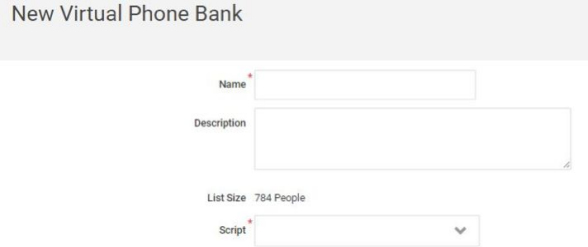
given one name at a time until everyone on the list has been attempted once. It's convenient, easy, and it takes away the hassle of data entry.

SETTING UP YOUR VPB



When making a Virtual Phone Bank, it's important to make sure that you narrow your list to Phones Only. You can edit your existing search, and select Home and Cell under the **Type** in the **Phones** section. Once you've done this, click the Calls icon (pictured below). You'll then click Set up Virtual Phone Bank List and Next to start choosing what data will be displayed.

You'll next see a screen that gives you options for how the list will appear to those using the VPB. For the Name, the best naming convention for a Virtual Phone Banks includes **<<County/City>><<Precinct>>: <<Description of Target>>**. *For example, a call list of volunteer targets in House District 44 would be HD 44 Volunteer Recruitment. Select the correct script for the phone bank.*



After filling in that section, you're going to move down to the Upper Display, Lower Display, Editable Display, Viewable Display, and other options. Of options to choose in the Upper and Lower sections, it is recommended that Age, Sex, Polling Location, VAN ID, and Voting City are checked. Depending on the type of phone bank, the areas to be clicked in the editable and viewable section will vary. The last section includes the end date, the times it is available during the day, and other parameters to limit volunteers. I recommend checking "Show only People in Household from Virtual Phone Bank list" to avoid calling a household twice. The option to include the event scheduler is only on the My Campaign side.

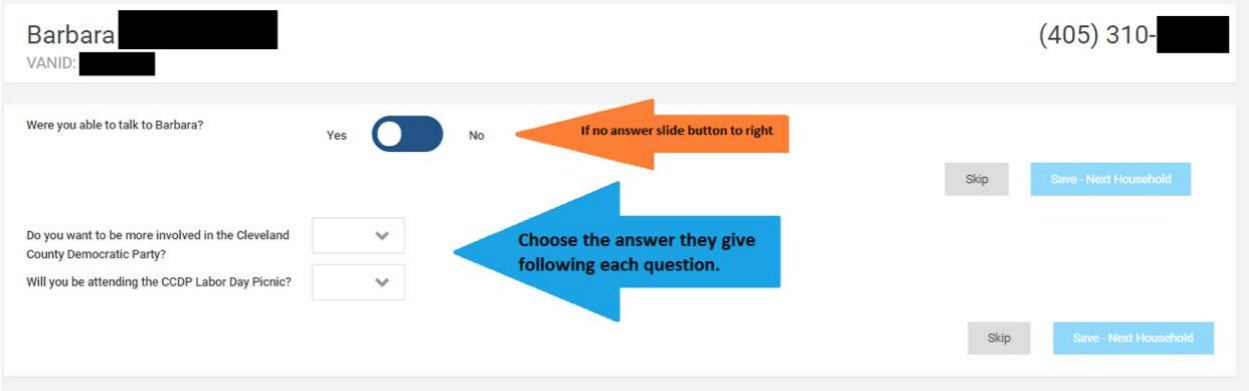
Once you've created the VPB, you'll notice below the name that there is now a VPB Code. This code gives you the option to allow other VAN users to enter the VPB by giving them that code to enter, but the easiest way to add users will be

to use the User Access section. Select users before clicking add and then save these additions before leaving the page.

There is also an option to allow the Virtual Phone Bank to be accessed by users who don't have a VAN account. By selecting Publish to openvpb.com on the creation screen, a public link will be created (as seen in the picture above) to share with others you'd like to gain access. The last step to access this VPB involves creating an Action ID account, which is outlined in the Action ID guide.

CALLING YOUR VPB

From the homepage of the side the VPB was created, click on Virtual Phone Bank in the Quick Tasks section. On the next screen, you'll be asked to either enter a VPB Code or select one that was shared with you. After choosing one of these options, you'll then be given your first name to call. The options and information being shown will vary depending on what was selected when the VPB was created. In this example, the name, age, gender, and phone number were given.



If a contact was made attempting this person, use the script below the name and mark the appropriate response to each survey question. If a contact was not made, moving the circle from yes to no will give options to mark attempt responses like "Not Home", Refused", "Moved", and more. After marking the appropriate response(s), **click Save – Next Household to save the result(s) and be given another name.**

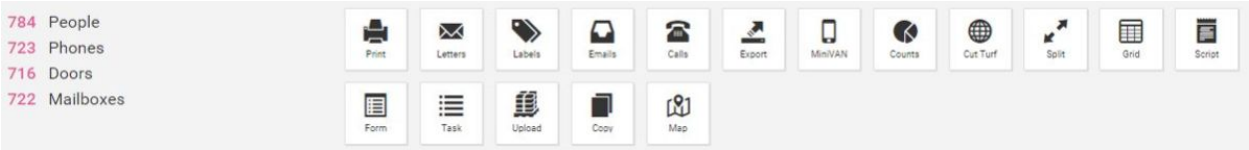
If the option of also showing people in the household from the Virtual Phone Bank list was selected, you will see a tab above their name to switch to other individuals on the list. This option gives the phone banker the opportunity to attempt either individual or both.

TRACKING VPB PROGRESS

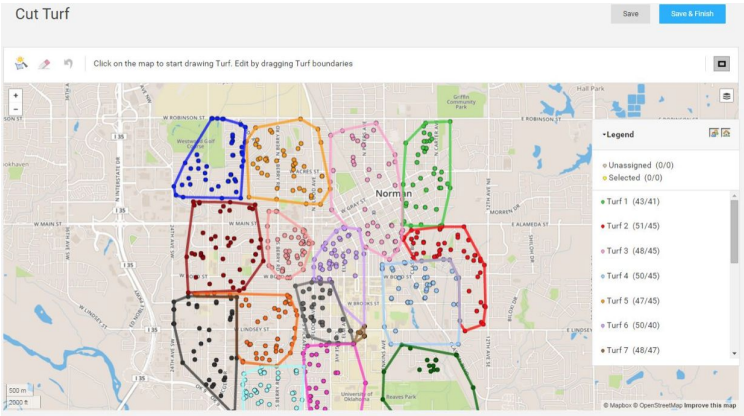
From the main page (My Voters or My Campaign) that the Virtual Phone Bank was created on, click on Phone Services then Virtual Phone Bank. On this page, you'll see all of the VPB that are active and their progress. Clicking Report will show a breakdown of the progress by user, and clicking the name of the VPB allows you to make changes to it.

CUTTING TURF

When trying to create turf to be walked, it's important to start with a list that focuses on an area like a precinct or series of them that are close. When creating your list, first narrow by Location (County then Precinct) in the search. On a campaign, we'd also narrow to targets but without them we could narrow to registered Dems.



Once you've completed creating your list for walking, click on the Cut Turf option to load the list in turf cutter. One thing to note is that Cut Turf will **only be an option if the list is under 5,000 people**.



Using turf cutter, we're trying to manage areas where we have a density of targets to divide it up into smaller areas. While a list may start with +600 doors for example, we'll work towards cutting sections to a reasonable amount of doors (around 35-45) for 1 person to walk in a 3-hour shift. As you can see in the picture below, loading our targets in turf cutter pinpoints them on Mapbox. Turf cutter shows just how close or far these households are from each other, and it helps to gauge obstacles that could arise if someone was to walk it.

To start creating a turf, click on the map to make your first point. Clicking again somewhere else on the map will make a line connecting the two dots, and the next click will make a line from your second dot to the third. You'll notice that the area between these points will be highlighted, and the idea is to build your points around the doors/people you want in your turf. To close out the turf, click on the first point in the series. You have the option of adjusting your points by clicking and dragging the bold or the lighter dots on your line.

The way we cut turf will play a huge role in deciding whether the canvass is a success or not. There is more to it than just simply making a box on a map that reaches a certain number of people/doors. Here are some best practices to use when creating turf:

- Plan out the route your canvassers will take when you start cutting the turf to avoid backtracking.
- Cut along streets and avoid crossing major intersections, streets, and highways. If you must send someone across major roads, check for crosswalks by looking at the map in Satellite view
- Use your local knowledge with apartments, hills, busy streets, etc. Switch to Satellite if you're unsure.
- **Lines of different turfs should never cross or else the list won't load properly after saving it**.
- Don't make areas too big; lots of incomplete walk packets WILL make your life harder.

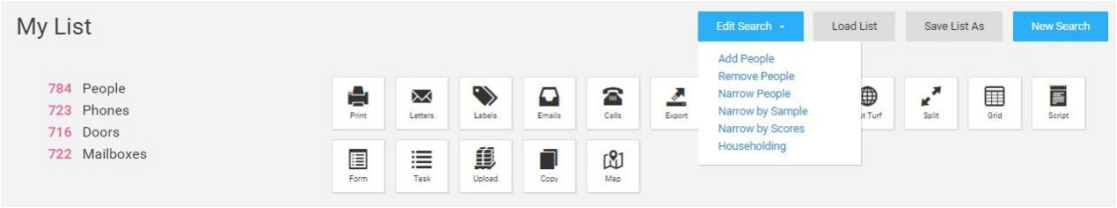
The Naming Convention for saving turf is **<<County/City>><<Precinct>>: <<Description of Target>>.** Example: HD 44 Volunteer Recruitment

PRINTING LISTS

While there are options to keep your lists in digital form to be used for Virtual Phone Banks or the MiniVAN application (covered in the next section), there is the option to print these lists on paper.

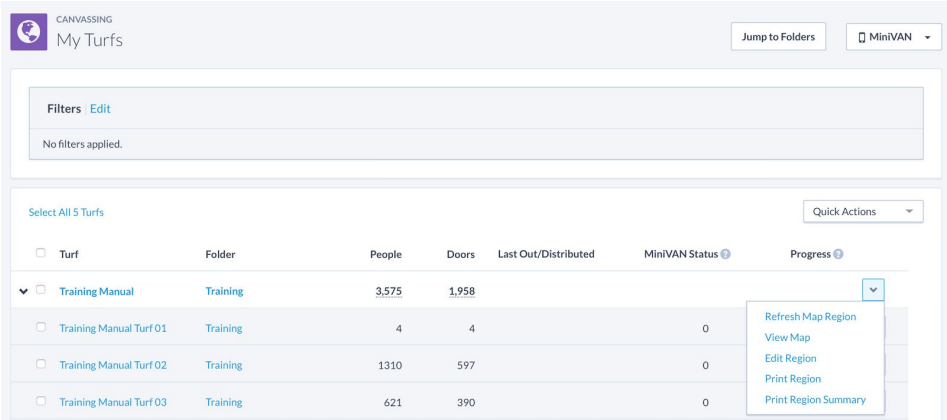
Phone lists

The first step is to make sure that the list includes only people who have phone numbers. To include only people with numbers, either edit the existing search or narrow to people and use the Phones tab. Once you have the phone list finalized, click the Print icon in My List. On the next screen, you'll choose the Report Format that is tailored to your region. Doing this will load the appropriate script and contact type, and you'll use the naming convention before hitting next to create a PDF.



Canvas Packets

After cutting turf, click either View My Folders or My Turfs (from home page) to start selecting a turf to print. For this example, we will use My Turfs.



In My Turfs, the default is to show what you've cut and what has been shared with you. The top section allows the user to narrow to turfs by name, the user who created it, distribution date, or the folder. In the Map Region/Turf section, you're able to Refresh, Edit Turf, Edit Criteria, Print Region, Generate a List Number, and Send Turf to a MiniVAN User. There is also the option to select individual turfs and use Quick Actions to print them all at once. When using one of these methods to print, please make sure to use the correct script for your region's canvass.

SURVEY QUESTIONS

Using Survey Questions can help you gauge the responses of voters, volunteers, or organizations. In order to set this up, click on "Codes-Questions-Scripts" on the left hand panel. Select "Survey Questions" then click the blue "Add new Survey Question". You'll then reach this screen:

CYCLE

Select what election year your survey question applies to.

TYPE

Select the general category that the question falls into **Long Name, Medium Name, Short Name** - The system chooses between three versions of the name for display purposes, depending on what will fit in a particular display. It displays the Long Name whenever possible. It uses the Medium Name when space is an issue, such as on Reports. And it displays the short name when space is very tight, such as in column headings on Canvass Results or Counts and Crosstabs.

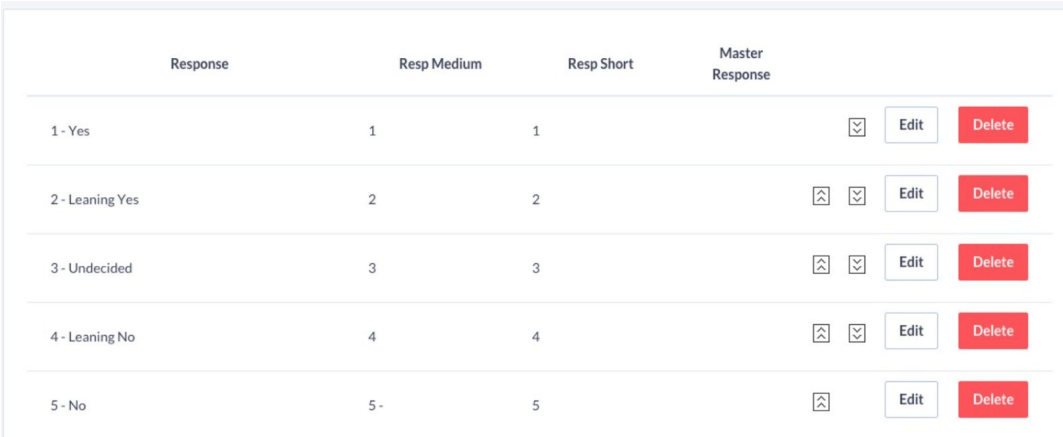
QUESTION

Question is the question that will be added to the canvasser's walking or calling Script on the printed Report if the user wants to ask Voters questions such as "Would you be willing to take a yard sign?"

APPLIES TO

Select to whom your questions are directed at: people, organizations, or both.

Finally, enter the answers to the created survey question in the newly formed box below. Click Add to add responses to the question, Edit to edit the responses, and Delete to delete the responses. When finished, click Save.



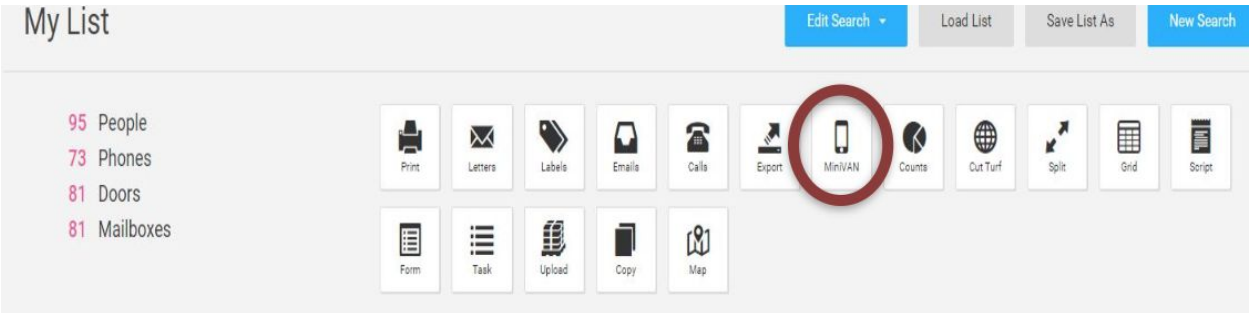
Response	Resp Medium	Resp Short	Master Response		
1 - Yes	1	1		Edit	Delete
2 - Leaning Yes	2	2		Edit	Delete
3 - Undecided	3	3		Edit	Delete
4 - Leaning No	4	4		Edit	Delete
5 - No	5 -	5		Edit	Delete

WHAT IS MINIVAN?

MiniVAN is an application that virtually downloads walk packets to your iPhone, iPod Touch, iPad, or Android device. This technology allows volunteers to efficiently and effectively canvass neighborhoods without the hassle of managing paper walk packets and clipboards. Most importantly, MiniVAN gives you the opportunity to avoid data entry after a canvass.

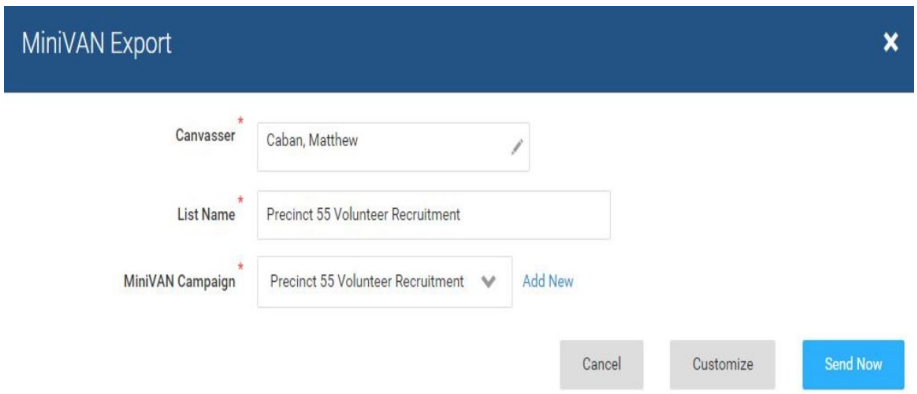
GETTING STARTED WITH MINIVAN

From My List, click on the **MiniVAN** icon:

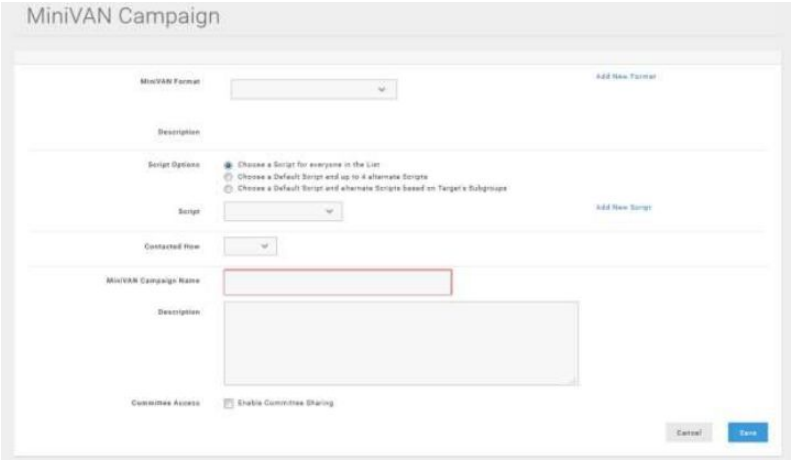


Next, select the canvasser, (last name, first name). Then name the list and select the MiniVAN Campaign. Finally, click **SEND NOW.**

***Note**: If a MiniVAN Campaign is not available, then you will have to create one by clicking **Add New**.*

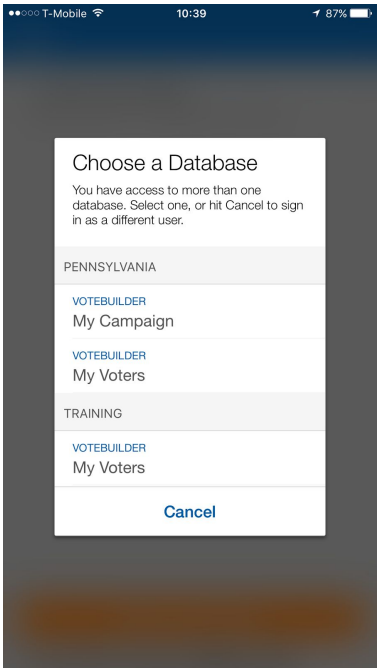


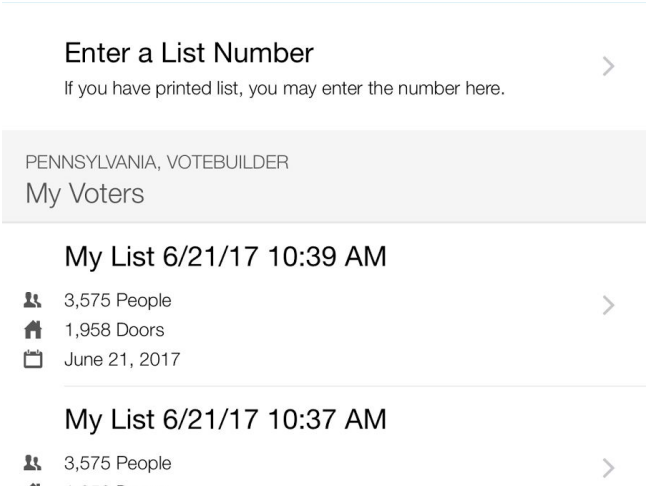
Select a MiniVAN Format (defaults are available), script options, Contacted How, MiniVAN Campaign Name, and click **SAVE**:



After downloading **"MiniVAN Touch"** from either the App store or the Google Play store on your mobile device or tablet, sign into the application using your ActionID Username and Password. Select My Voters or My Campaign depending on what database the turf was cut in. If unsure, the rule of thumb is that voter outreach is created in My Voters and volunteer outreach is created in My Campaign. Most turfs are cut in My Voters.

There are two ways to access available lists. Lists can be assigned to users by using VoteBuilder on the PC, or users can be given list numbers from printed lists or list numbers can be generated from the Manage Turf section of My Voters.

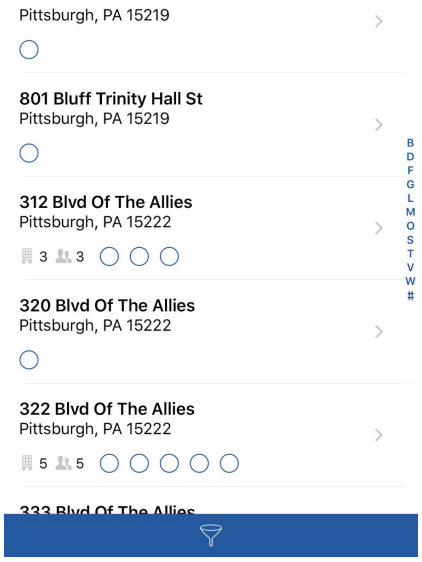




When choosing to enter the list number, enter the list number as seen on the walk list or in the manage turf section and click submit.

Once the list loads, there will be four options. **1) Menu options on the left, 2) Sync data, 3) Filter options for the list, and 4) Selection of targets at a specific address.**

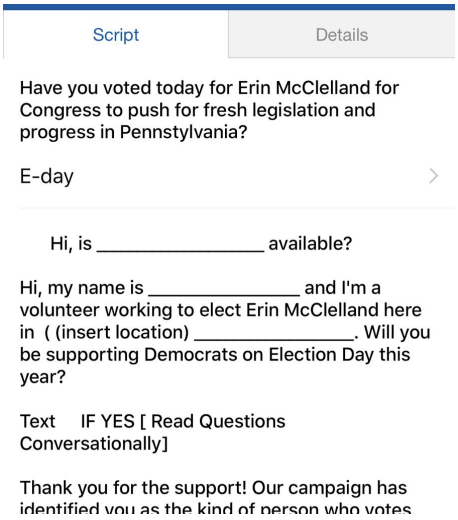
The Menu option includes three sections, 1) options to view the list by, 2) specific list options for the list that was loaded, and 3) account options. **The Filter option** filters the list by either the street number or the contact result. All contact results from the script that was selected will be listed. Once a specific address has been selected, every target at that address will be listed and ready to access.



Once a person is selected there are 4 options on their screen, 1) the script view, 2) details about the person, 3) contact details about the interaction (user entered data), and 4) an option to show or hide the text of the script.

If the initial contact result is a non-contact then the options from the previous slide appear depending on the non-contact options in the script that was selected. If the initial contact is a contact then survey questions and activist codes from the script associated with the walk list will populate the section for answering.

The details section contains basic voter file (or my campaign) information about the target on the list. At the top is basic demographical information. Below that information are the districts the person lives in, any known phones and the ability to add a phone number and any known email addresses and the ability to add those also. Even further down will be the contact history of the person and the activist codes that they have been tagged with, and at the bottom of the list there will the survey response history



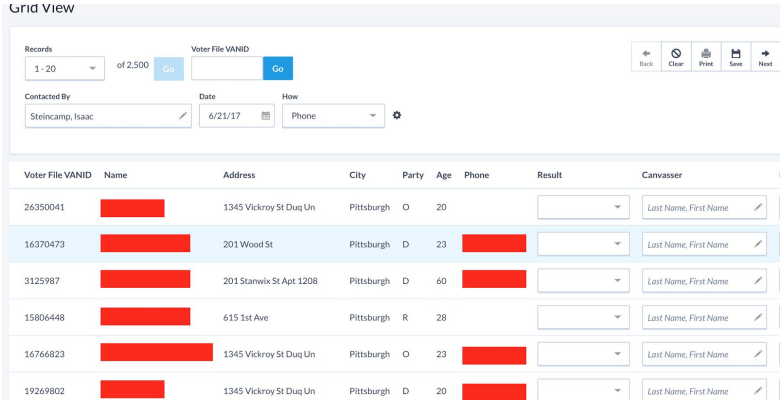
Responses on the script view and additions on the details side are all saved locally in the app, so it is safe to navigate through pages without worrying about losing data. For the data to reach the online version of VoteBuilder, **users must sync their data**.

USING GRID VIEW

The Grid View takes your paper list and populates all of the names so that the information collected can be entered into VAN. It's important that data from a canvass/phone packet is entered before 11 PM CST.

Start on the homepage of the side of VAN that your list is from, and click on Grid View under the Load Data section. You'll be asked to enter a List Number to load the data, and this can be located at the bottom left part of the page.

When entering the List Number, make sure to enter the numbers in the correct boxes. If you just enter the numbers without clicking in the correct box, the first number that would be after the dash may be put into the first section and give you an error. Once the List Number has been entered, VAN will ask for the Canvasser and the date that the list was attempted. Search by last name for the person who canvassed them, and add them if they aren't in VAN as a canvasser before moving to the next page.

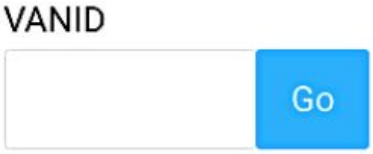


Grid View will now load all of the people from the walk/call list in the same order they are on the physical pages. Simply go through and enter each response/contact from the sheets in front of you. When clicking in the boxes to mark a response, there is a shortcut to find the appropriate response faster than just clicking and scrolling. For example when trying to mark someone as Not Home in the Result section, you can press 'N' to bring that response up.

Best Practice: click the gear icon to the right of the Help Wiki to change the number of rows that appear. When entering pages from a phone bank, it's helpful to enter a number that matches or is double the number of rows on each sheet so that you know when a page (or two) is done that the last entry on both matches up.

Once you've finished entering data on a page, you **must** click Save in the top right for the data to actually be put into VAN. Once this has been done, click Next to move to the next page of people.

If you're not starting on the first page of a packet or you're having problems finding an individual person, look them up by their VAN ID. Doing this allows you to jump pages and bring that individual to the top.

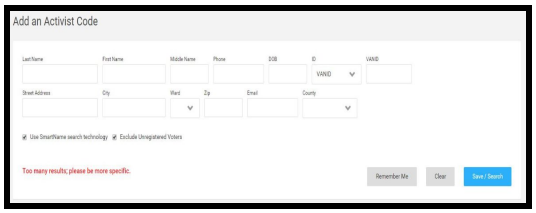


Once you're done entering all of the information on the packets, **make sure to save again before exiting.**

QUICK MARK

Select **Quick Mark** from the load data screen. Next, select the name of the activist code, survey question, or canvass result code that people will be tagged with. Then, enter when the data was collected and select the person who collected the data. Before proceeding, enter how the data was collected, and then click **NEXT.**

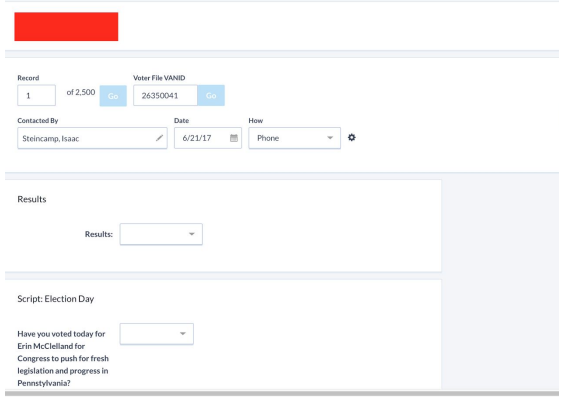
Next enter all the information known about the person being searched, and click **SAVE/SEARCH** to find this person:



Finally, check the box next to the person's name to tag the person (survey questions will have a dropdown with answers to choose from), and click **SAVE/SEARCH** to save the work and enter a new person to search follow the previous steps.

Once users are familiar enough with this process where it is comfortable to them, they can attempt to enter search data on a new person before they save the data on the current person being searched. This allows for the data to be saved on a current person and have a new person retrieved with one click.

SCRIPT VIEW

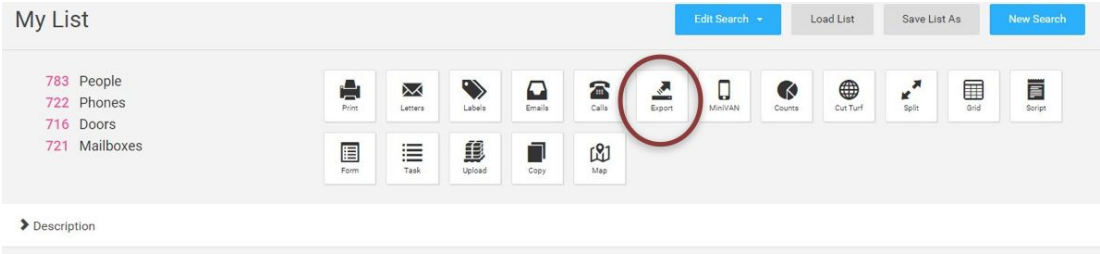


Select "Script View" from the list in the Load Data menu from the home page. Then, choose whether the list is from the most recent "My List" or it's a created list and there is an associated list number. Click next to reach the following screen.

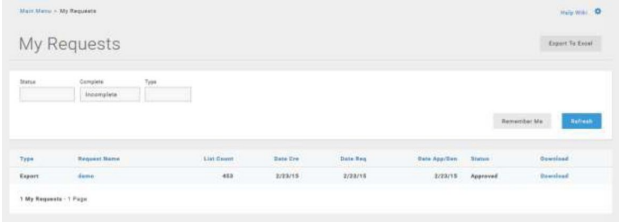
After the call has been made, select the result of the call (not home, busy, disconnected, etc), and choose answers based off the contents of the script. When completed click save/next either at the bottom of the screen or at the top right.

EXPORTING DATA

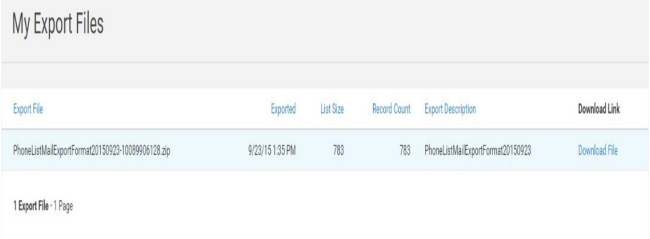
In the top right of the My List screen there will be these options. **CLICK** the export icon:



Enter a request name, short summary of the export, and a date to have by, then click submit. When the request is approved, click on the 'My Request' section in the top left of the main menu and click 'Download' next to the file.



Select the formats from the following options and click 'export now'. To customize export options, click 'Customize Export'. When ready, click 'My Export Files' at the bottom right of the screen. While the file is loading the screen will say 'In Progress'. Refresh the screen until it says 'Download' and click the link to download:



CREATING AN ACTIVIST CODE

Select **Activist Codes** from the "Codes, Questions, and Scripts" section on the left hand panel, and select add new activist code in the top right of the screen. Here you can enter the following information to create your code!

ACTIVIST CODE TYPE

The "type" property is used for the purposes of sorting and viewing Activist Codes in a list; this is particularly helpful when the number of Activist Codes becomes large and otherwise unwieldy. The State Admin must request from VAN any additional Activist Code Types.

LONG, MEDIUM, AND SHORT NAMES

The system chooses between three versions of the name for display purposes, depending on what will fit in a particular display. It displays

the Long Name whenever possible. It uses the Medium Name when space is an issue, such as on Reports. And it displays the short name when space is very tight, such as in column headings on Canvass Results or Counts and Crosstabs.

DESCRIPTION

The description field allows a User to explain thoroughly what the Activist Code is meant to say about a voter that has been assigned it. It is not necessary to enter anything in this field.

SCRIPT QUESTION

Script Question is an optional feature that will be added to the canvasser's walking or calling Script on the printed Report if the user wants to ask Voters questions such as "Would you be willing to take a yard sign?"

SCOPE

A public or private Activist Code determines who can see the Voters that have the Activist Code assigned to them. When a public Activist Code is applied to a voter, every User on the site that has access to that Voter who has access to that Activist Code will see the Activist Code applied to them. When a user applies a private Activist Code to a Voter, only Users on the same Committee that applied the code will see the Activist Code on that Voter. Note that it is not necessary to create a separate private Activist Code for each committee that uses it. For example, if three Committees want to ask voters if they want a yard sign, simply create one private Activist Code named "Yard Sign" and give all three committees access to that code. This one step automatically creates a private Activist Code named "Yard Sign" in the database for each committee without having to do extra work.

IS ALSO ACTIVIST

"Is Also Activist" means that a Voter who has this Activist Code applied should be generally considered a political activist. This becomes a useful tool when you are organizing Voters to a rally, for example. On the Create a List page, a user may select all Activist Codes marked "Is Also Activist" at one time rather than creating separate lists by using the Activist Code picker. It may seem as though anyone with an Activist Code is an activist; however, these codes are used for a variety of purposes. For instance, if a state party or campaign obtains a list of voters with a hunting or fishing license, they can apply an Activist Code to highlight this information. While these people will have an Activist Code, there is no reason to assume that they are political activists.

CAN BE ASSIGNED OR REMOVED

This allows Users to assign or remove the Activist Code from a Voter. Some Activist Codes should not be assigned or removed by Users after an initial group is listed. For instance, restricting assignment or removal would be appropriate for ballot language requests or party delegates; unchecking the option after the initial group is set will make the Activist Code available but not modifiable without the appropriate security profile.

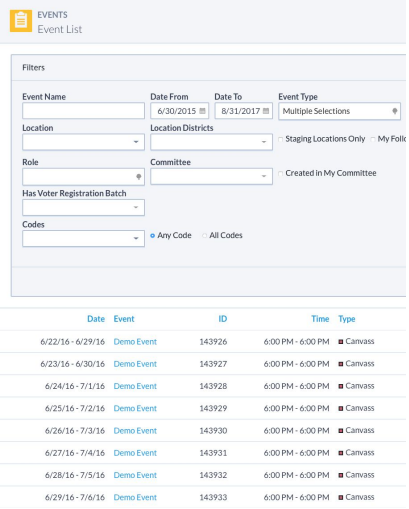
DISTRICT ROLES

Default is none. When used, associates the Activist Code with a specific type of district. For example, it could be used to identify elected officials, candidates or district level volunteers. Initially the home district is assigned; a link is provided to change to a different district.

STATUS

By default, Activist Codes start out as active. An archived Activist Code can still be used in searching. However, to avoid clutter, it does not appear on normal lists. An inactive Activist Code will no longer appear on the site unless an administrator reactivates it.

In this next section, we'll focus on using the MyCampaign database. As you'll remember from the beginner VoteBuilder training session, MyCampaign starts as a blank database. This means you'll need to add your own volunteers and supporters as your build your campaign/committee's infrastructure. Remember, every campaign has to build a base of support.



CALENDAR EVENTS

The Event Calendar on My Campaign is where we track supporters and volunteers who attend or participate in a campaign/committee specific event. The Event List option is the best way to view events.

EVENT TYPES

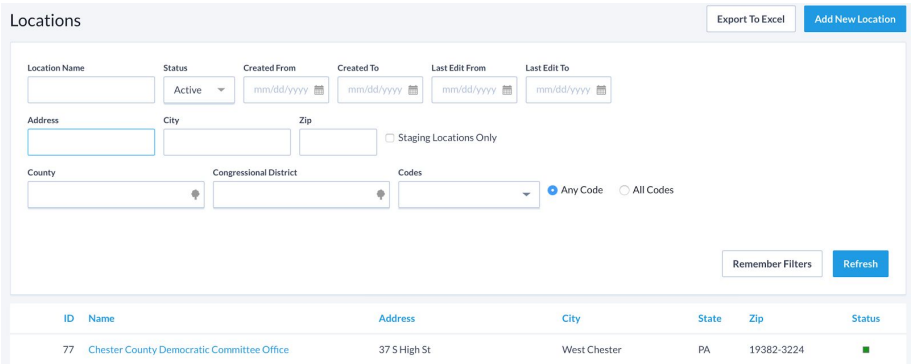
Besides naming events, using Event Types allows campaigns/committees to classify events to make searching easier. Some examples of Event Types include: Canvassing, Data Entry, Fundraising, One Off Event, One-on- One, Phone Banking, Strategy Session, Volunteer Recruitment, and Voter Registration.

LOCATIONS

The recommended naming convention for locations: **<<City/Town>>: Location name**. For example, a location at Ms. Jackson's House in Ada would be Ada: Ms. Jackson's House.

CREATING A LOCATION

In 'My Campaign', click "Volunteers, Events, Titles" in the left hand Administrative menu, then click on locations. Before adding a new location, please search by address to see if there has already been one created. If the location isn't in there, click on the Add New Location icon in the top right part of the page. On this page, add all of the information requested. It's crucial to enter a full address to ensure that it geocodes and that it is clear for others looking at the event.



If there is a duplicate, a screen with possible matches will appear. You'll want to click on the possible match and go with that location instead of creating a new one.

ADDING LOCATIONS TO EVENTS

After you've created a location, you'll have to add the location to the events in the calendar. Starting on the homepage of My Campaign, click on Calendar Events and then Event List to look at the events. After finding the event you're looking to add a location to, click Edit Locations. You'll have the option on this next screen to add locations, and it's important after checking the location(s) to be added to apply this change to all events in the series.

SCHEDULING VOLUNTEERS

To schedule volunteers in events, the quick way to do this involves using Quick Mark with the Event Scheduler. Search for the volunteer and click on the calendar to the left of their name to start scheduling them. Using the Event Scheduler, you'll narrow to the day of the event on the calendar, the event type, and the location. After hitting refresh, you'll be able to schedule the volunteer for a shift. Make sure to save it before leaving this page. If you're doing volunteer recruitment for an event using a VPB, you can also quickly schedule volunteers involves using the event scheduler. This is only an option on My Campaign VPB's.

STATUSES

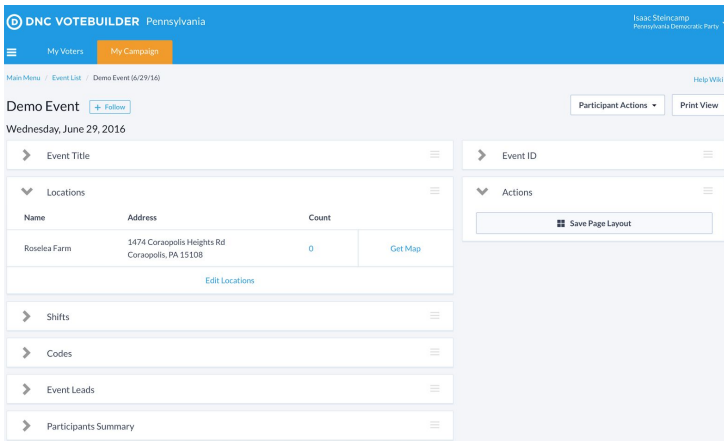
When scheduling volunteers/participants for events, we only use the following statuses:

Invited: The volunteer is wavering on whether or not to attend and the organizer wants to associate them with the event so as to not lose that knowledge.

Scheduled: The volunteer committed, in response to an organizer's hard ask, to showing up to the event.
Left Message: The volunteer had been scheduled for the event but did not pick up when called to confirm their attendance. This must be updated to No Show if the event passes and the organizer was unable to reach the volunteer. *Do not mark this response if the volunteer was never actually scheduled – that would incorrectly indicate a No Show.*
Declined: The volunteer had been scheduled for the event but when called to confirm, declined to attend.
Confirmed: After scheduling the volunteer, an organizer called them to confirm their attendance at the event and the volunteer confirmed.
No Show: The volunteer had been confirmed to show up to the event but did not.
Completed: The volunteer shows up and completes the activity.

TRACKING AND CLOSING SHIFTS

CLOSING OUT EVENTS



At the end of every day, all of the individuals scheduled in each event for that day must be closed out with a status that reflects what happened. **The only statuses that volunteers can have after the event is over are Declined, No Show, and Completed**.

EVENT LIST

With events that involve multiple people scheduling volunteers/attendees into a single event, the best way to find your scheduled individuals to close out them out involves sorting by either the Location or Recruited By rows. After sorting and finding your volunteers, you can either change the status manually by going through each individual status and changing it manually or clicking boxes next to the VAN ID and using the Quick Action option to change the status of multiple volunteers to one status.

Make sure if you're changing the status manually that you save the changes before leaving the page or else the changes will not actually be finalized.

An alternate way to track or close shifts from the Event List section is to click on the event and examine the Locations section. Clicking on the count for the location will only load people that have a status with that location, and it is an easy way to sort shifts for a specific day and event type.

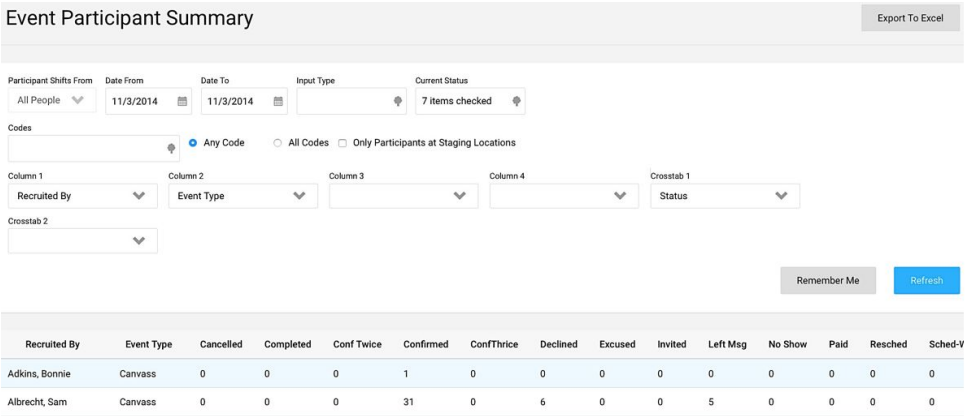
EVENT PARTICIPANT LIST

An easy way to track shifts, open or in the future across multiple event types, is to use the Event Participant List under the Calendar Events section.

In Event Participant List, there is the option to narrow a search to the following fields: Event Type, Status, Input Type, Role, Event Name, Dates, Recruited By, and Location. These options are extremely helpful because it allows the user to narrow to their specific shifts through multiple search criteria and manage it across multiple event types.

EVENT PARTICIPANT SUMMARY

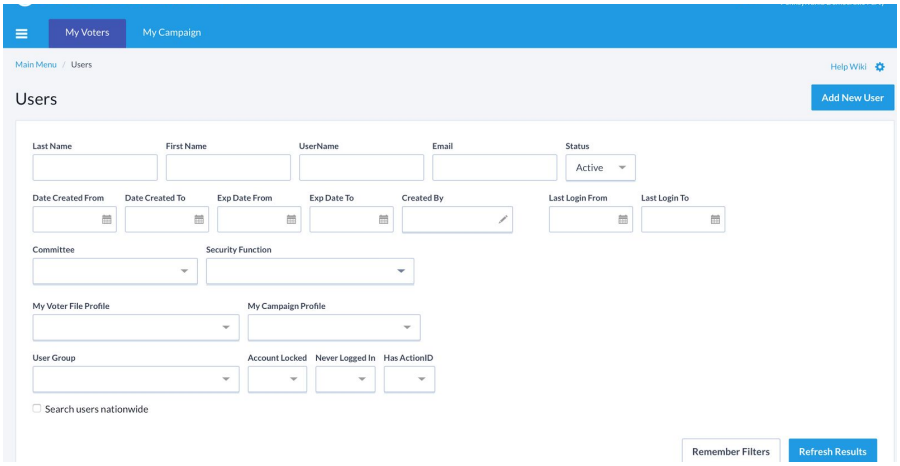
Another way to track volunteer statuses by the person they were recruited by involves using the Event Participant Summary in the Analyze Data section of My Campaign. Using the Columns and Crosstabs section, a user can narrow to Recruited By and Event Type in the Columns section and Status in the Crosstab to track the volunteer recruitment numbers. Just like with Event Participant List, using the Date From/To is a great way to examine an organizer's progress to goal or track whether an organizer has shifts in the past that aren't closed out.



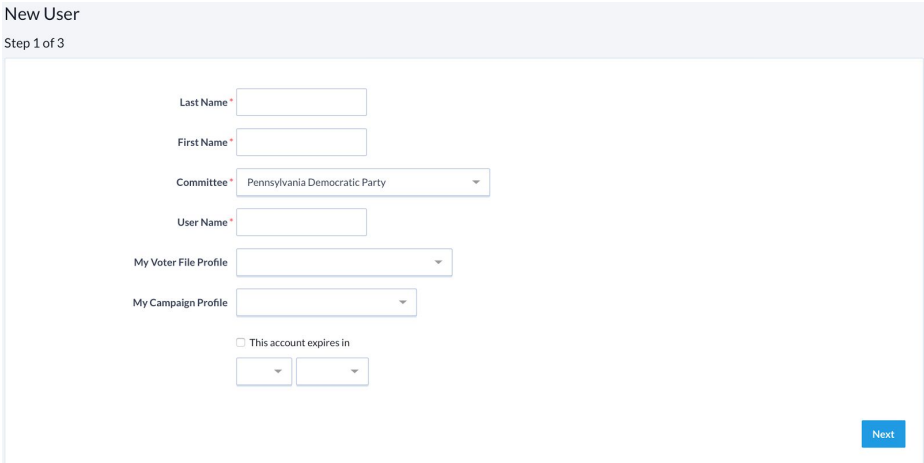
Recruited By	Event Type	Cancelled	Completed	Conf Twice	Confirmed	ConfThrice	Declined	Excused	Invited	Left Msg	No Show	Paid	Resched	Sched-V
Adkins, Bonnie	Canvass	0	0	0	1	0	0	0	0	0	0	0	0	0
Albrecht, Sam	Canvass	0	0	0	31	0	6	0	0	5	0	0	0	0

CREATING VAN ACCOUNTS

In order for individuals to be able to do data entry using Grid View, calls using the Virtual Phone Bank, or canvass with the MiniVAN app, they must first be assigned a VAN account. It's important that each staffer or volunteer has his or her own account so that there is accountability for each individual's actions in VAN. To make an account, go to the Users section on the homepage of My Voters or My Campaign. The next step is to click the Add New User in the top right corner of the page.



Step 1: fill out the Last Name, First Name, Committee, User Name, and the My Voter and My Campaign profile. It's best to use a **naming convention** when naming users. Some examples being used include an abbreviated designation for the committee followed by a period, then the first letter of their first name and their last name.

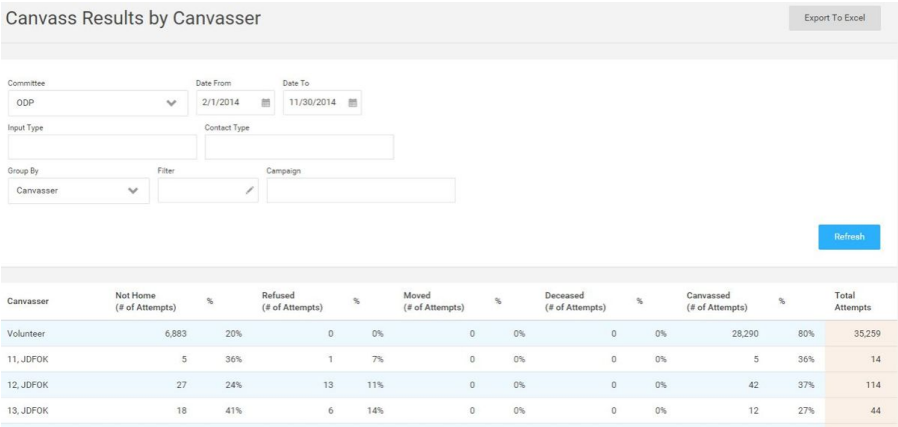


For User Profiles: assign the appropriate access for the user.

Step 2: is to assign regional access. Options include: statewide access, county, precinct, congressional, state house, state senate, city, and custom regions specific to a committee.

Step 3: is to fill in the individual's email so that an email can be sent to select their password for the account. The link in the email is only valid for 48 hours, so please make sure that they're able to set it within that time frame. Once they've chosen a password, they will now be able to access VAN.

VIEW CANVASS RESULTS



Canvasser	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Volunteer	6,883	20%	0	0%	0	0%	0	0%	28,290	80%	35,259
11, JDFOK	5	36%	1	7%	0	0%	0	0%	5	36%	14
12, JDFOK	27	24%	13	11%	0	0%	0	0%	42	37%	114
13, JDFOK	18	41%	6	14%	0	0%	0	0%	12	27%	44

There is an easy option to view the counts of people attempted on a given day or set of time using View Canvass Results under the Analyze Data section of the home page of VAN. Click on Canvass Summary to examine attempts that are entered. You'll notice in the screenshot above that there are different criteria that the canvass results can be narrowed to.

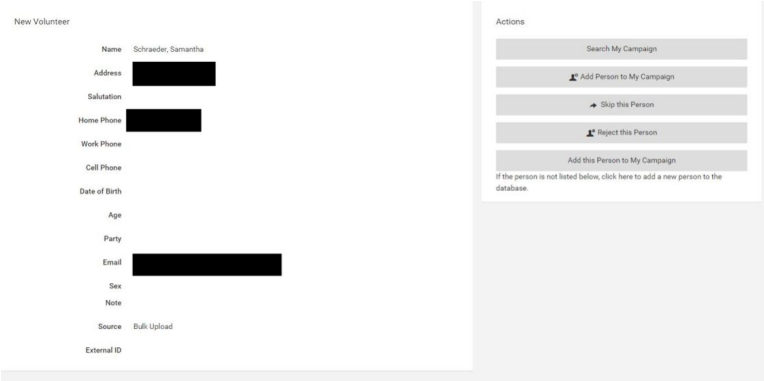
Date From/To – While the default is to examine yesterday's results, this section allows the user to narrow to range of time. This includes when they were canvassed, not when the data was entered.

Contact Type – Allows users to narrow to the specific way a person was attempted. e.g. –Walk, Phone

Group By – Allows the user to view the results by a distinct type like county, city, and more.

PROCESS VOLUNTEERS

On the homepage of My Campaign, click on Process Volunteers to start matching or adding volunteers that were bulk uploaded to the database. On the next screen, you'll be given the information of a potential new volunteer to update, pull over from the My Voters, or add to My Campaign. (see next page)



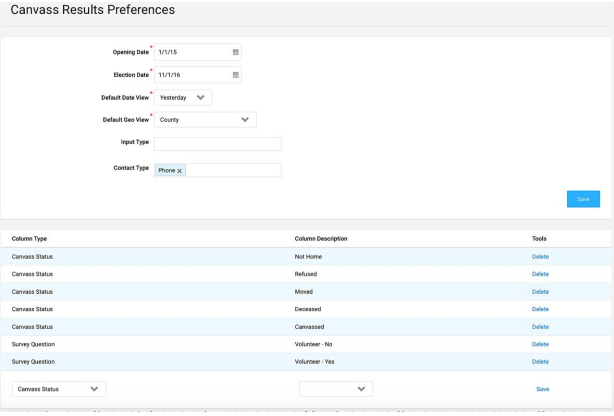
In the example pictured above, there is a person in the section below in My Campaign that matches the information provided in the New

Volunteer section. Since there is a match, click the circle next to the name in the lower section and then click Update My Campaign Database to finish processing the volunteer.

If there wasn't a possible match or it was empty in the section below New Volunteer, click Search My Voter File to see if anyone matches in My Voters. If someone matches, click next to his or her name and then Add Person to My Campaign.

If there isn't a match after searching My Campaign and My Voters, click on Add this Person to My Campaign to process them. **You should only do this if no one matches.** After doing one of these steps to process them, you'll be given another person to match until the number gets to zero.

REPORT PREFERENCES



When looking at the attempts for Walk or Phone contacts in the Canvass Results, there is the option to edit the fields being shown and save it as the default. To get started, click Set My Report Preferences under the View Canvass Results section.

In Canvass Results Preferences, you have the option to set the date it shows upon loading along with the geo view and contact type. The column type allows you to customize the statuses (EX: Not Home, Refused, Moved), survey questions (like candidate support, volunteer), and activist codes being shown. Once you're done customizing your preferences, click Save to finish.

SCHEDULING FOLLOW UPS

There is an option in VAN to allow users to set follow up calls for themselves and other users, and it can be particularly useful for an organizer doing recruitment calls and trying to manage individuals who request or need an extra attempt at a specific time.

To schedule an individual for a follow up, start by using Quick Look Up to find their record. On their record, click the Schedule Follow Up hyperlink under the Contact History section. This will bring up a separate window to select the date in which to follow up, the person to do the actual follow up, the method for contacting them, and a note section to add relevant details. Hit Schedule to finish.

Once it has been created, there will be a reminder in red on their record under the contact history.

Contact History

Date	Canvasser	Committee	Type	Result	Input
9/28/15	Caban, M.	ODP	Phone	Schedule	Manual
6/16/15	Caban, M.	ODP	Phone	Canvassed	Quick Mark

Add New Contact Schedule Follow Up More

Viewing Follow Ups – Now that individuals have been marked, go to the home page of the database (My Voters or My Campaign) that the follow ups were marked and click on Follow Up Calls in the section that has Welcome [your name] at the top.

My Follow Up Calls

Date From: 9/28/15 Date To: 10/5/15 Created By: Followed Up By:

Remember Me Refresh

Name	Address	City	Age	Phone	Follow Up	Follow Up How	My Campaign ID
Caban, Matthew Ray	905 Shadowhill St	Norman	31	(405) 819-9213	9/28/15	Phone	100877859

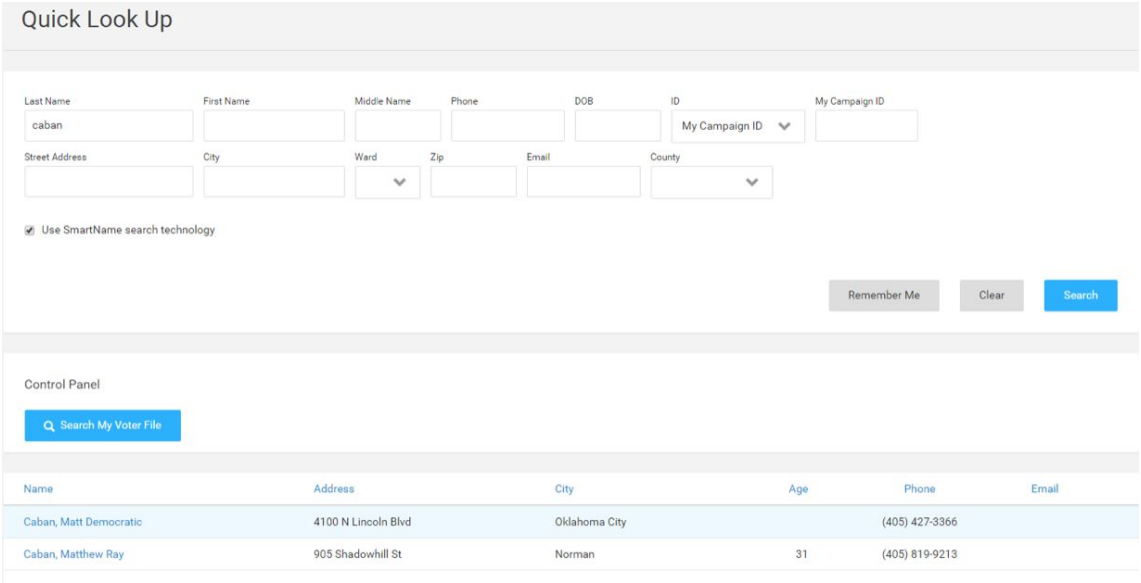
1 People · 1 Page

From here, you'll be able to see all of follow ups marked that aren't completed. As you work through them, click on an individual's name to load their record and the Schedule icon in the Contact History section to mark completed follow ups, reschedule the time, or cancel them.

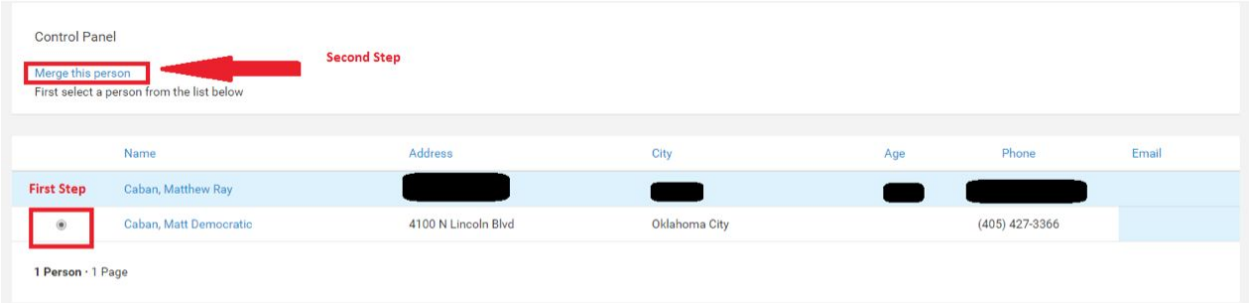
MERGING 'MY CAMPAIGN' PEOPLE

Since all of the records in My Campaign are added by users at various levels of access by either copying individuals from My Voters, manually adding, or bulk uploading them, there may be times when you may find duplicate records for individuals. If this happens, please take the steps outlined below to merge those duplicates into one cohesive record.

Start by searching for the individual in Quick Look Up that has multiple records. Below you'll see an example with two records, and the next step is to click on the one with the most information.



On the individual's My Campaign record, click on the Merge Duplicate icon under Actions at the bottom of the right column. The next screen will have you search again for the duplicate, and you'll click on the circle next to that record before hitting Merge This Person.



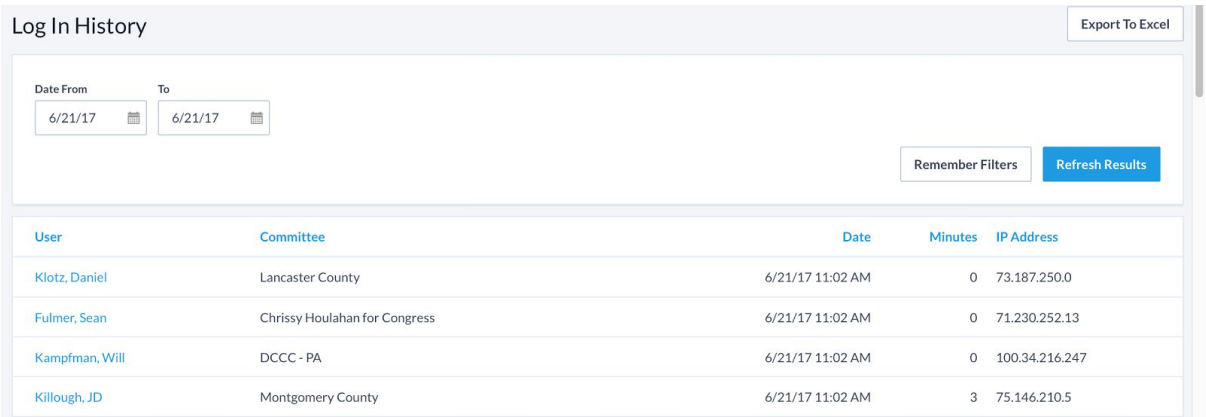
You'll be prompted to select which fields will actually stay on the record should there be differences between them. In this example, it asked whether to keep the full address or to leave it blank like in the other record.

The last page will ask to confirm the merge by clicking the box acknowledging the merge is irreversible, and then you'll hit finish to finalize the process. The newly merged record will now appear, and you can repeat this process if there are more duplicates on the database to merge.

MONITOR THE SYSTEM TOOLS

LOG IN HISTORY

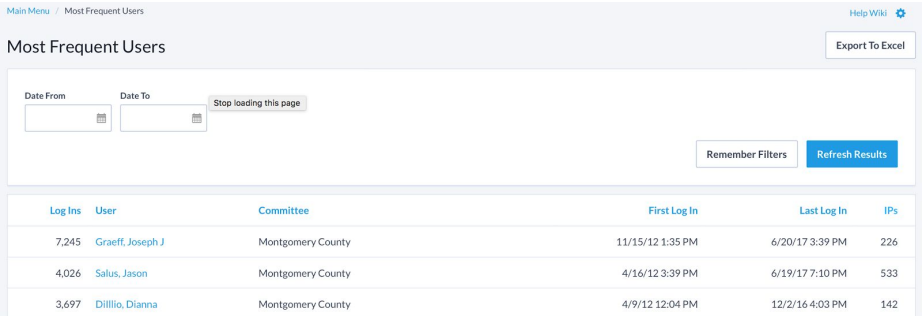
Log In History is a feature that allows an administrator to track the date and time users have logged into VAN, the duration of time they were active, what committee they were on (if they have access to multiple), and their IP address. This can be helpful to gauge the productivity of users among other things.



There is the ability to sort the order by user, committee, date, minutes logged in, and the IP address by clicking on the row header. The Date From/To section allows the user to narrow the search to a specific range of days. Clicking on a user will narrow to only log ins by them. This section by default will load the most recent log in, but the default sort order can be changed using Remember Me.

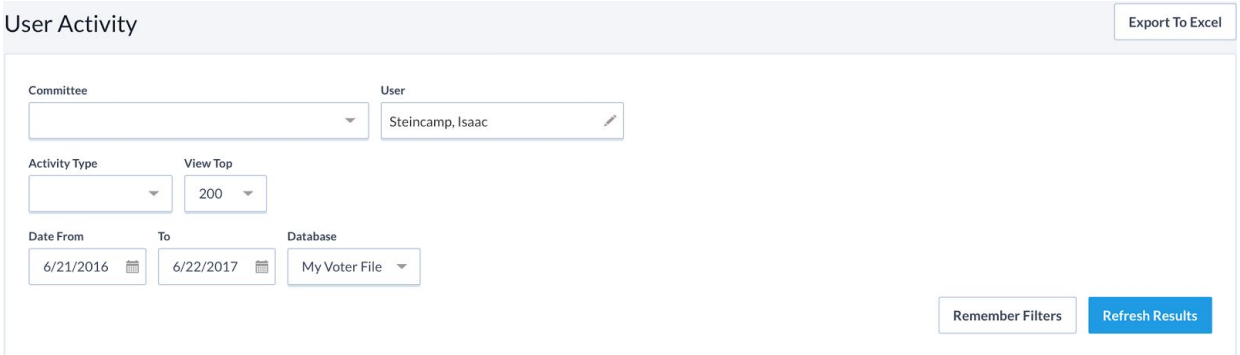
MOST FREQUENT USER REPORT

The Most Frequent User Report shows the total number of log-ins by a user, the total number of unique IP addresses they've logged in with under that account, the committee in which their account was created, the first time they've logged in, and the last time they've logged into VAN.



USER ACTIVITY REPORT

The User Activity Report is a helpful tool for administrative users to be able to monitor the activities of users with VAN access below them. This allows them to monitor the lists that are being created, exported, and printed. On the homepage of My Voters or My Campaign, click User Activity Report under Monitor the System to get started.



The User Activity report defaults to loading the most recent activity, but the section above allows the user to narrow to specific fields. These fields include:

Committee – this section allows the user to switch between different committees.

User – narrow a search to a specific individual in VAN.

Activity Type – allows the user to view the following activities: Blast Email, Bulk Upload, Create A List, Export, MiniVAN Export, Print, and Saved Search.

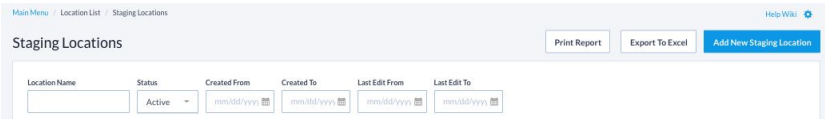
View Top – lets the user control the number of rows shown.

Date From/To – narrow to a certain range of time.

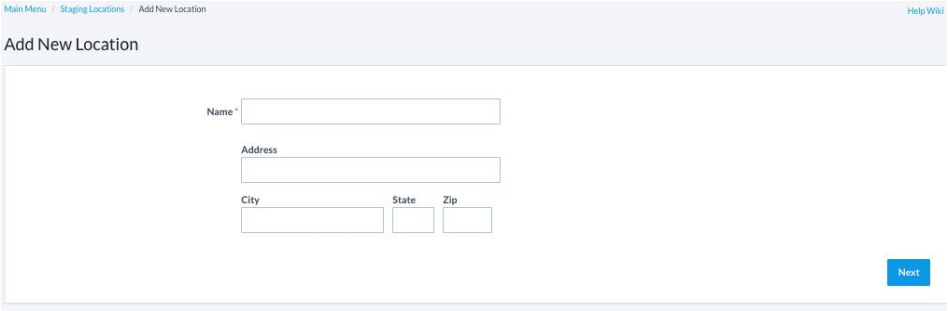
Once you've narrowed to the criteria you're looking to monitor, clicking the hyperlinked activity will bring up the fields that were selected in the search. This helps the administrator for example to track whether the correct targets are being pulled, or to examine the search criteria of a VAN export.

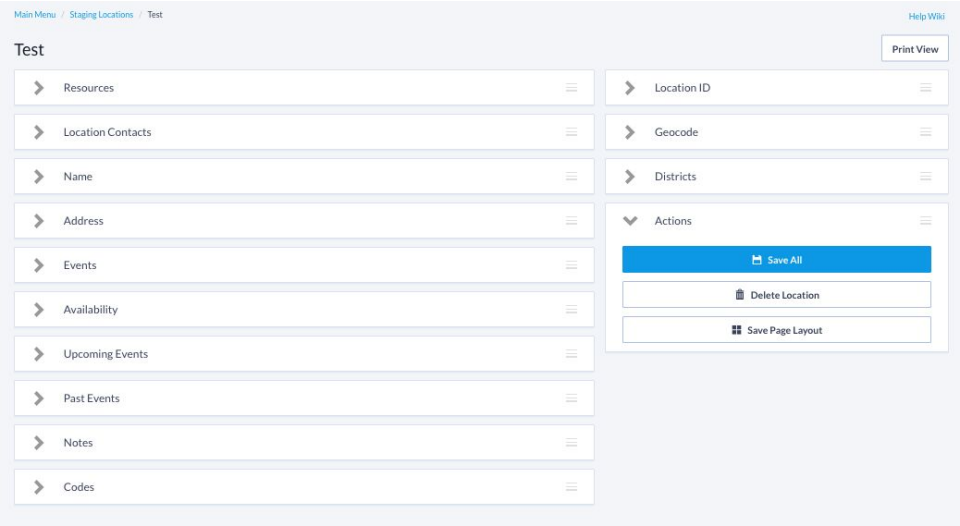
CREATING STAGING LOCATIONS

Select **Staging Locations** from the Get Out The Vote menu. Then, in Staging Locations, select **Add New Staging Location:**



Add a name, address, and then click next. On the next screen, edit your location details and next.


Main Menu / Staging Locations / Add New Location
Help Wiki
Add New Location
Name *
Address
City
State
Zip
Next


Main Menu / Staging Locations / Test
Help Wiki
Test
Print View
Resources
Location Contacts
Name
Address
Events
Availability
Upcoming Events
Past Events
Notes
Codes
Location ID
Geocode
Districts
Actions
Save All
Delete Location
Save Page Layout