Florida Democratic Party

VANual

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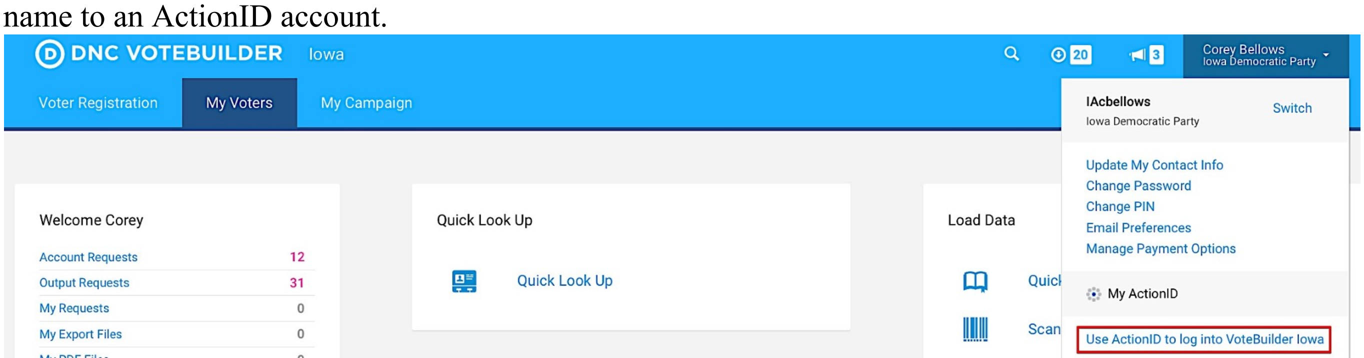
Resetting Your Password

If you've forgotten the password for your VAN account, the first thing you should do is click on "I forgot my password" on the login page. Clicking on that link will bring you to a page that will ask for your user name and the email address associated with the account. If the information you've entered is correct, you'll click Finish on the next page to be sent an email with a password reset link that'll only be active for 48 hours. If you're unable to remember your user name and email and/or it won't validate them, contact your administrator to reset your account

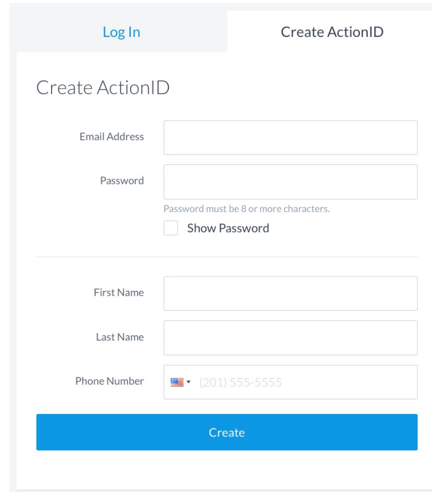
ActionID Login

When logging into VAN, you'll notice that there are two different sections to access the database: ActionID and VAN ID. Every individual logging into VAN has been assigned a user name, but an ActionID account allows an individual to tie multiple VAN and/or NGP user names to a single email address. It's free to create an ActionID account, and there are other benefits besides being able to tie multiple accounts that are covered below.

<u>Avoid Password Changes:</u> Every individual logging in using a VAN user name is required to change their password every month, but users who log in with an ActionID account do not have to. You can continue to do a monthly password change, or create an ActionID login to avoid this and tie your user name to an email address. Below are two ways to create and tie your VAN user name to an ActionID account.



ActionID Creation (Logged into VAN): Click on your full name in the top right corner of the main page of My Voters or My Campaign, and then click on "Use ActionID to log into Votebuilder Iowa" (pictured above).
The next screen (pictured to the right) will ask you to either enter your ActionID login or to click on the Create ActionID tab to enter your personal information and a password to associate with the account. You'll be asked if you'd like to use Two-Step Security Verification on the next screen before finishing and being brought back to the VAN homepage.



ActionID Creation (Not Logged into VAN): On the login screen, click on the blue "Log in with ActionID" box. The next screen (pictured to the right) will ask you to either enter your ActionID login or to click on the Create ActionID tab to enter your personal information and a password to associate with the account. You'll be asked if you'd like to use Two-Step Security Verification, and then you'll enter your VAN user name and the password associated with that account to finish tying your user name with the ActionID account.

ActionID – Other Uses: Having an ActionID account allows volunteers to gain access to OpenVPBs (Virtual Phone Banks) and MiniVAN without a VAN user name if they've been given a link or list ID number.

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My Voter Record

Almost all of the data stored about a specific individual can be viewed using the profile page, and data entry can be done from this location. Not all sections are used frequently, and as such this guide will only cover the most useful items.

Note: All profile components begin closed on your first login. Clicking on the symbol next to the section name will expand it. Once you start looking for specific areas to always 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.

Useful items to view inside a profile on My Voters:

Districts
Shows the legislative districts and Coordinated Campaign team structure location for the selected person, broken down by Regional Field Director Region, Field Organizer Region, and Team.

Activist Codes
Identify 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 info 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. Walk, Phone), the canvasser who attempted them, and the method in which the data was entered.

Voting History
This section 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.

VANID
The VANID is a unique number assigned to the current profile, and can be used in the Quick Look Up tool to quickly locate and 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. **NOTE:** Only people who are going to participate and/or volunteer with the campaign should be added to My Campaign.

Vital Stats

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

Polling Location

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

Early Voting

This section shows the status of the person's early voting activity - if they have requested a ballot, have had the application mailed, and if they have returned the ballot. If blank, nothing has been processed.

Targets

This section shows any targets a given person is listed within.

Address, Email, Phones

Shows the currently active information for the selected person - when using Grid View, the profile must be accessed to enter new information for these three fields, so they are used frequently.

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.

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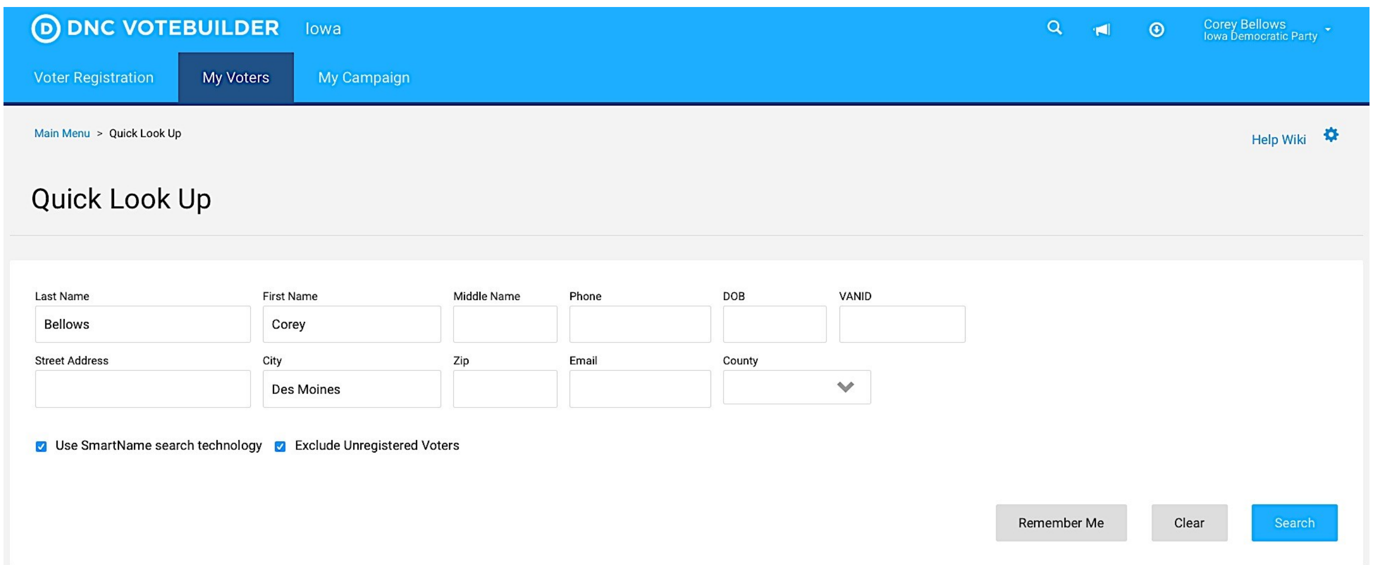
Quick Look Up

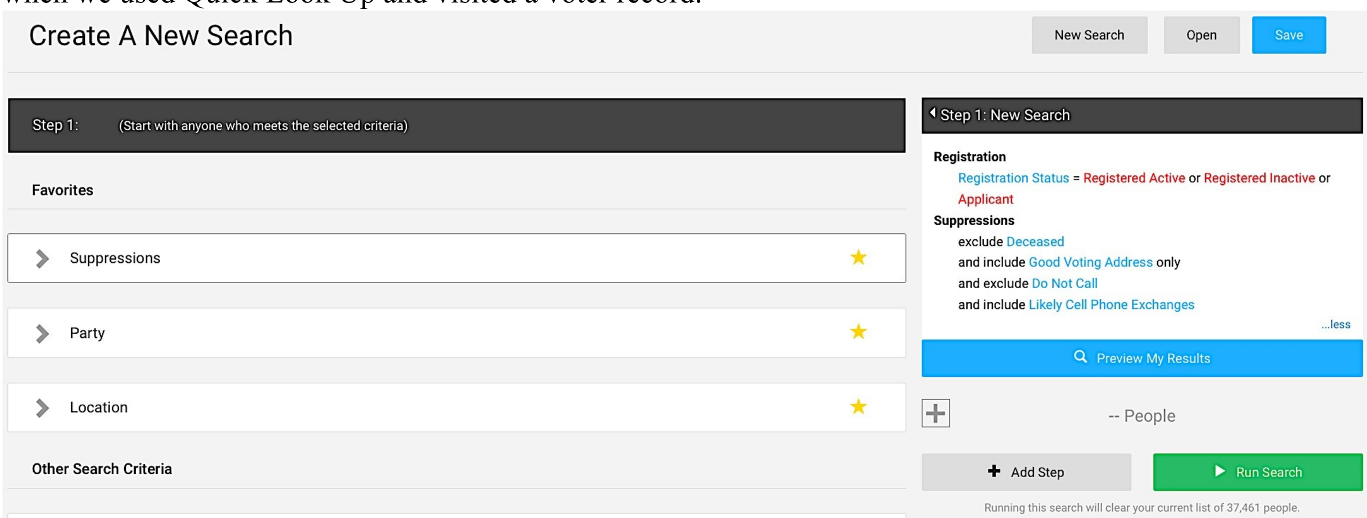
Quick Look Up is one of the most basic tools in VAN. It allows users to look for an individual using almost any piece of information you have about them. You can search by name, contact information, address, or their VAN ID, which is a unique number assigned to each person in the system; if you are looking for a person and you have their VAN ID from a walk/call sheet, you will always find the correct person with it.



Keep in mind that you can 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 my name (Corey Bellows), we might put in <u>Last</u>: Bell, <u>First</u>: Cor 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.

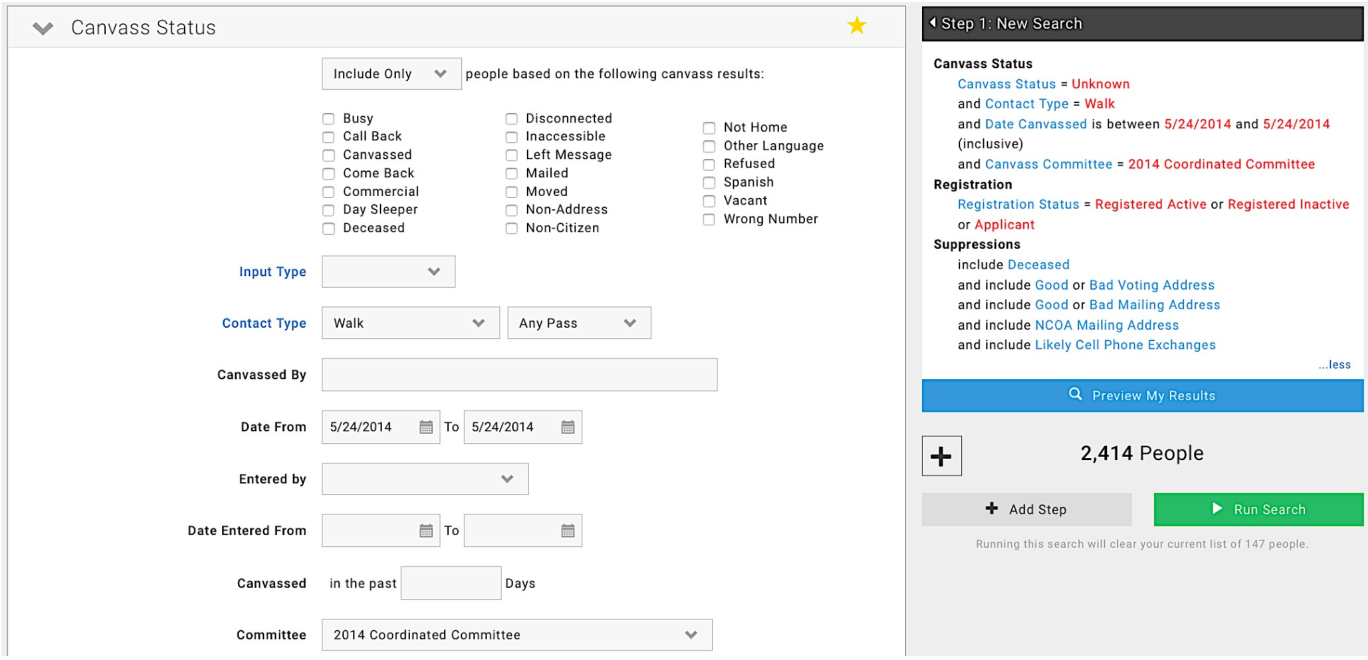
Create A New List

Start on the home page 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 on 5/24. 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 attempts by a specific individual. **Date From** looks at attempts within a certain range of time, while **Canvassed in the past __ Days** looks at a range of time like a week. **Committee** narrows to a certain campaign, like the '14 Coordinated Campaign.

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.

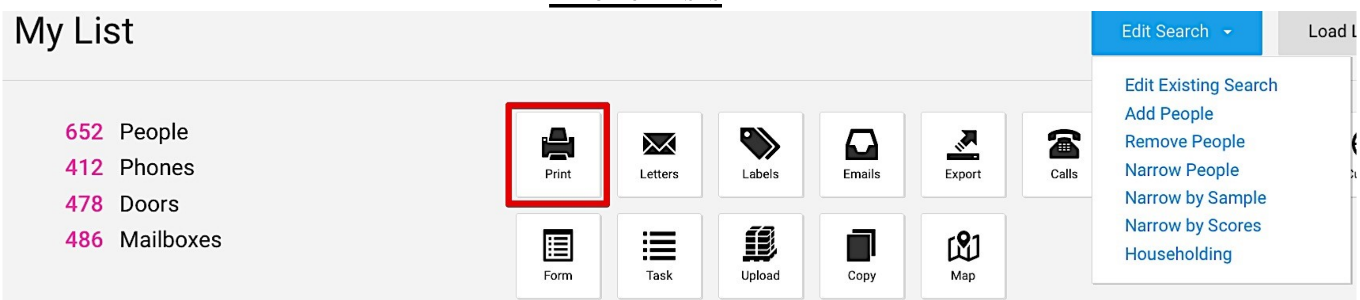


After selecting all of the fields for your search, **Preview My Results** to quickly check what the number of people, phones, doors, and mailboxes would be. There is the option on this screen to use **Add Step** to narrow this list further, remove a certain group of people, add people, and much more.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

Printing

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.

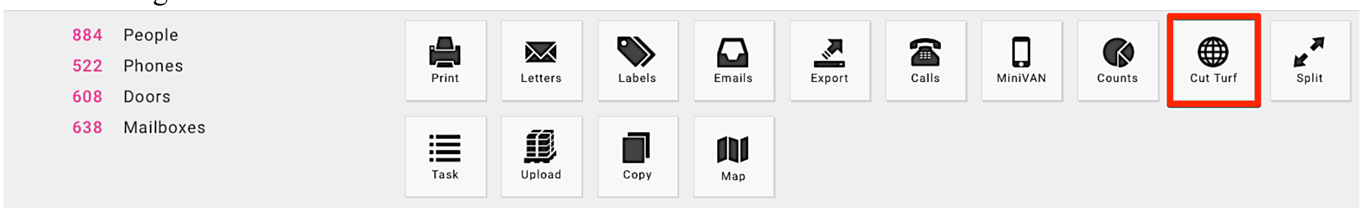
Phone Lists



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.

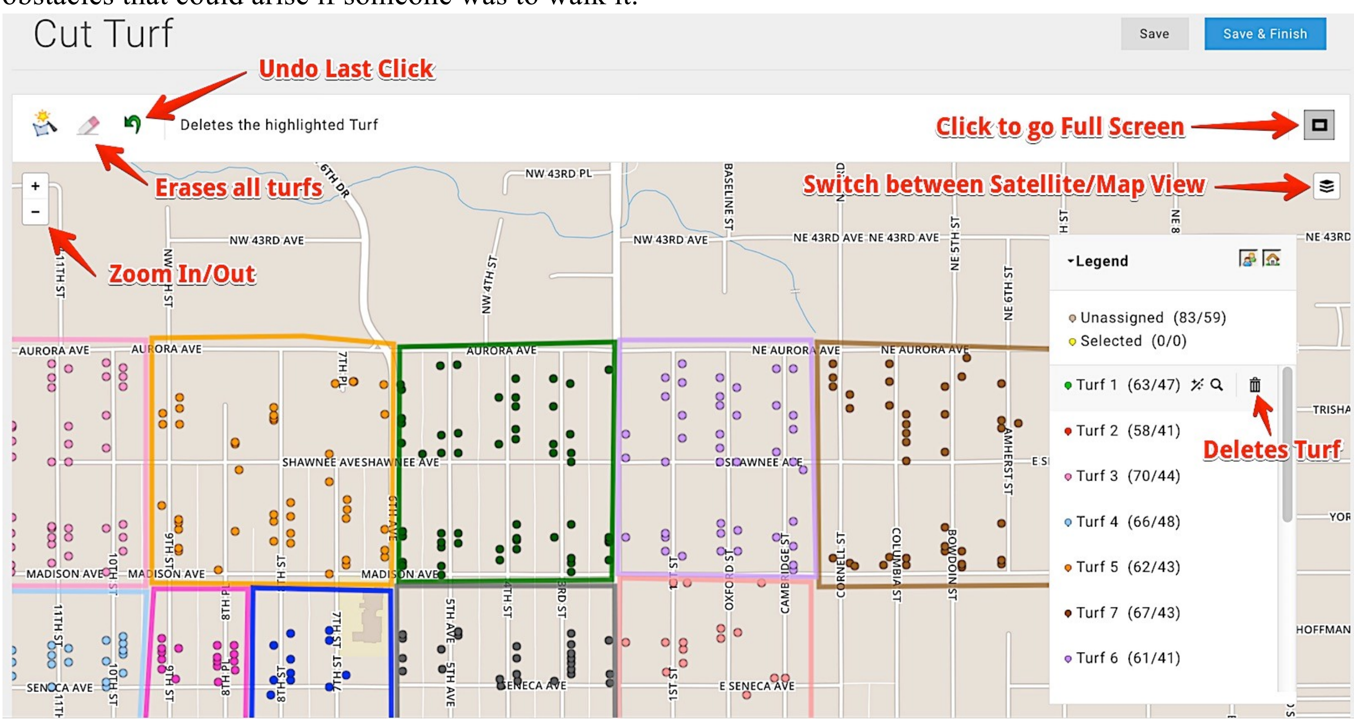
Cutting Turf

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.

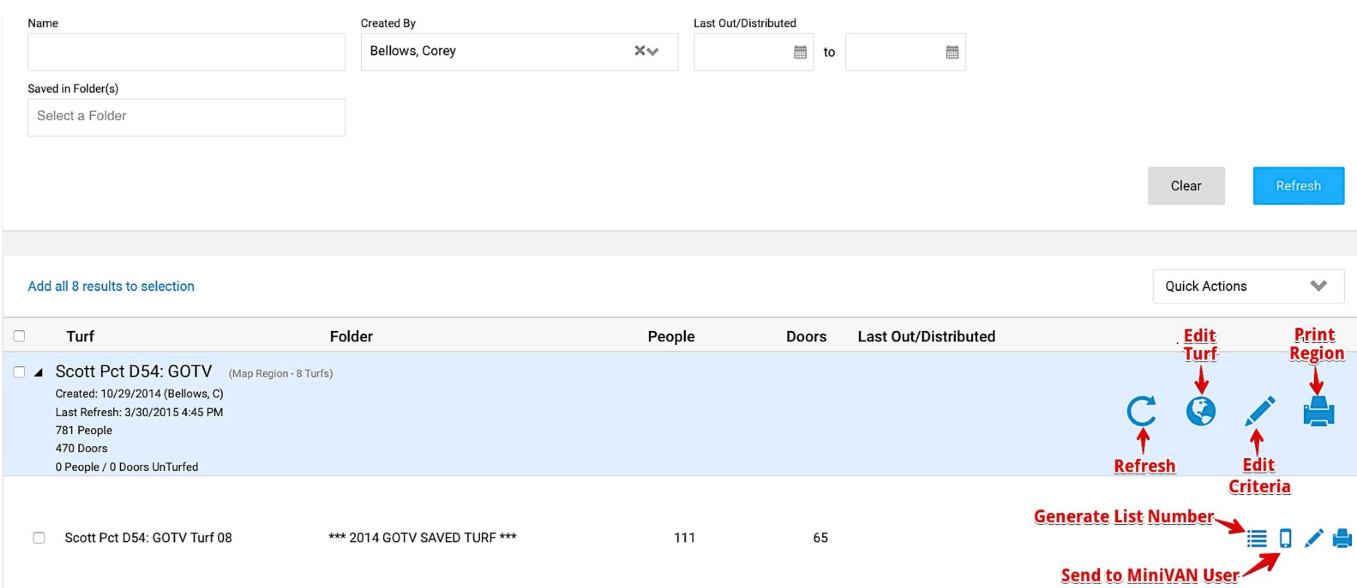
The way we cut turf will play a huge role in deciding whether the canvass is a success or not. There is more to it than just simply making a box on a map that reaches a certain number of people/doors. Here are some best practices to use when creating turf:

- 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: Collier, Naples 424: Persuasion

Canvass Packets

After cutting turf, click either View My Folders or Manage Turf to start selecting a turf to print. For this example, we will use Manage Turf.



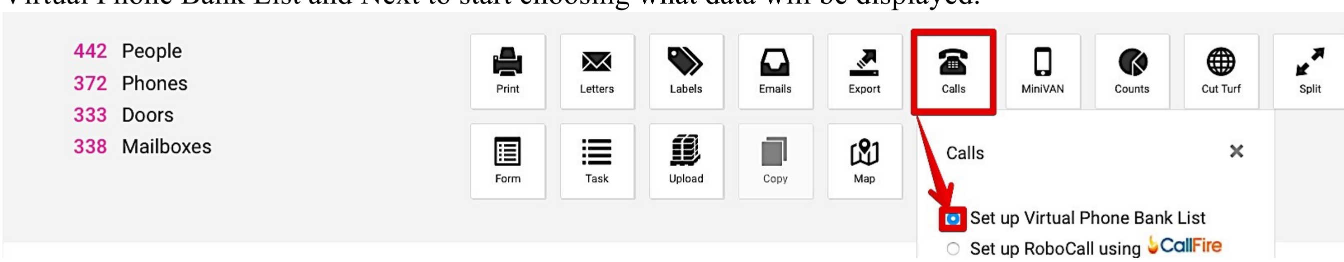
In Manage Turf, the default is to show what you've cut and what has been shared with you. The top section allows the user to narrow to turfs by name, the user who created it, distribution date, or the folder. In the Map Region/Turf section, you're able to Refresh, Edit Turf, Edit Criteria, Print Region, 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.

Virtual Phone Bank

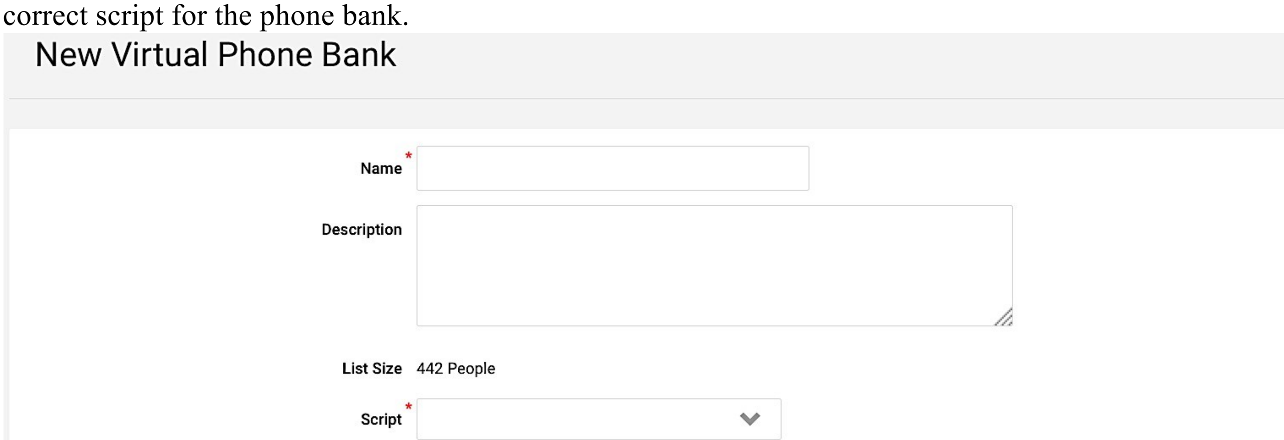
A Virtual Phone Bank (VPB) allows users with a computer/tablet and an Internet connection to use Votebuilder (VAN) and make calls from a list you've created and saved. Each user using the VPB will be given one name at a time until everyone on the list has been attempted once. It's convenient, easy, and it takes away the hassle of having to do data entry at the end of the day.

Creating a Virtual Phone Bank

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.

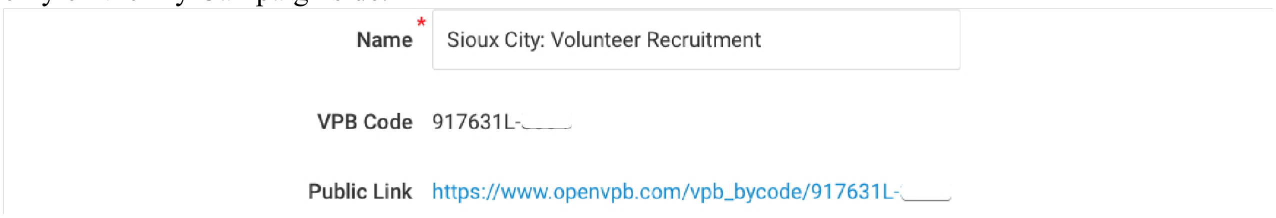


You'll next see a screen that gives you options for how the list will appear to those using the VPB. For the Name, the best naming convention for a Virtual Phone Banks includes **<<County/City>><<Precinct>>: <<Description of Target>>**. For example, a call list of persuasion targets in Sioux City Precincts 1-4 would be Sioux City Pct 1-4: Persuasion. 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.



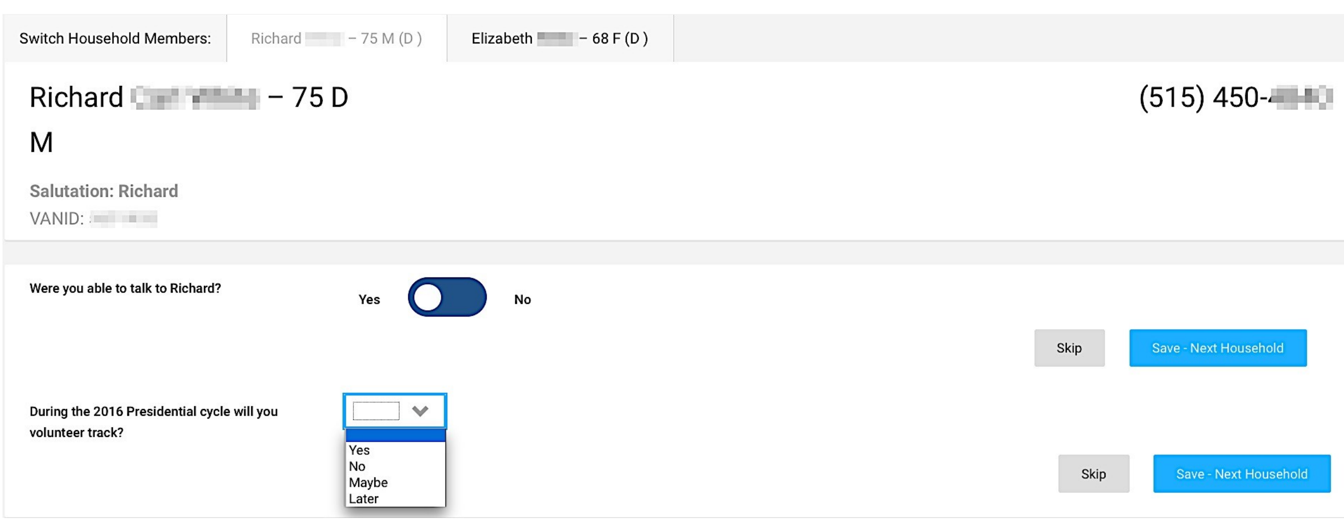
Once you’ve created the VPB, you’ll notice below the name that there is now a VPB Code. This code gives you the option to allow other VAN users to enter the VPB by giving them that code to enter, but the easiest way to add users will be to use the User Access section. Select users before clicking add and then save these additions before leaving the page.

<u>Open VPB</u>

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.

<u>Virtual Phone Bank Calls</u>

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.

Note: 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.

Grid View

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 home page 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 (see picture above for example).

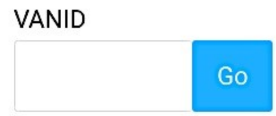
When entering the List Number, make sure to enter the numbers in the correct boxes. If you just enter the numbers without clicking in the correct box, the first number that would be after the dash may be put into the first section and give you an error ("A valid list number is required"). Once the List 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. Similarly in the SenBraley section, pressing 1 will bring up the 1 - Strong Braley response.

Best Practice: click the gear ( ) 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.

<u>Important:</u> Once you've finished entering data on a page, you **<u>must</u>** 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.

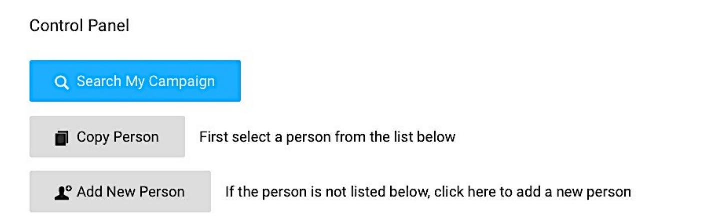
If you're not starting on the first page of a packet or you're having problems finding an individual person, look them up by their VAN ID. Doing this allows you to jump pages and bring that individual to the top.



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

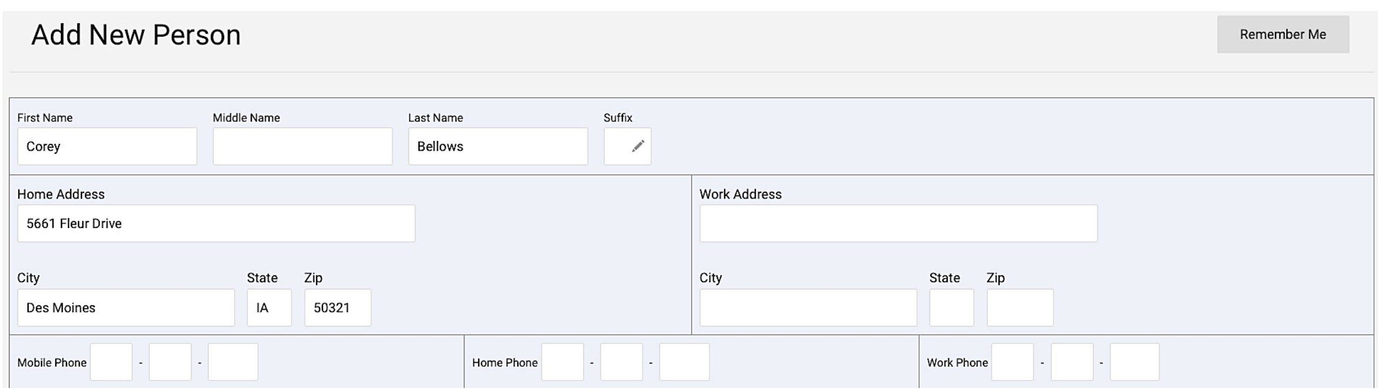
Adding People to My Campaign

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.



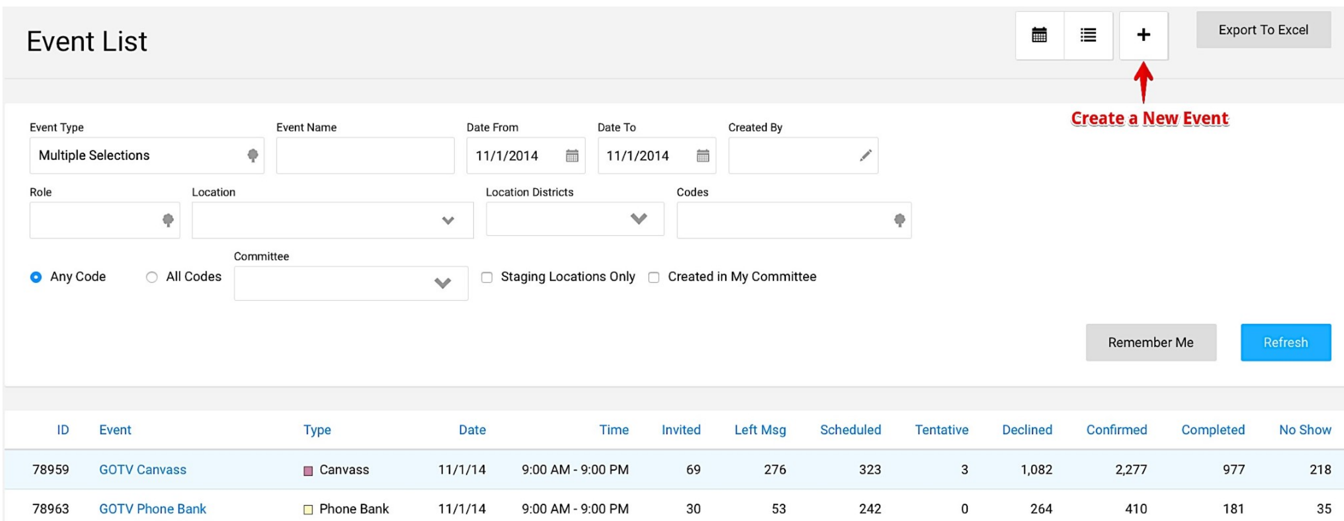
If the person is on My Voters, you'll be able to use the Copy Person function to bring them over to My Campaign. If they aren't on My Voters because they aren't registered to vote, just moved, live out of state, are a non-citizen, or some other circumstance, use the Add New Person to start the process of creating a profile.

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



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

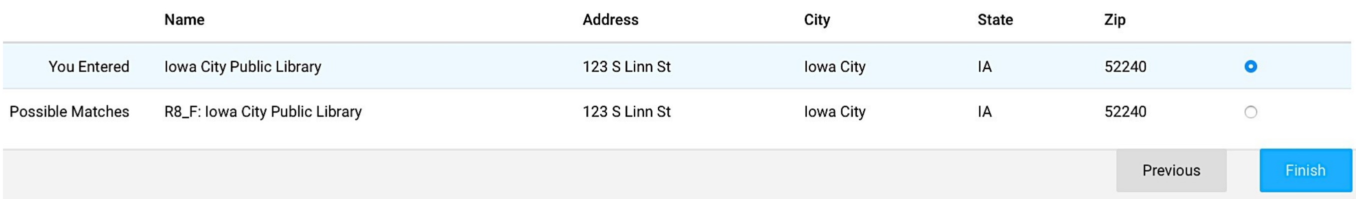
Besides naming events, using Event Types allows campaigns/committees to classify events to make searching easier. Some examples of Event Types include: Canvassing, Data Entry, Fundraising, One Off Event, One-on-One, Phone Banking, Strategy Session, Volunteer Recruitment, and Voter Registration.

Locations

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

Creating a Location

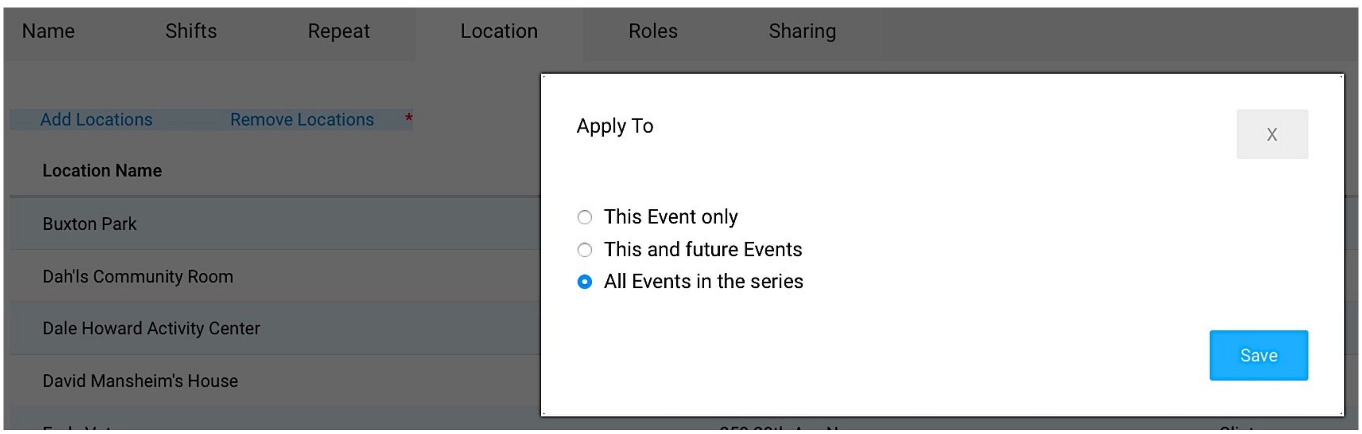
Start on the Main page of the My Campaign side of VAN, and then click on Locations under the **Events** section. **Do not** use the Staging Locations under GOTV. Before adding a new location, please search by address to see if there has already been one created. If the location isn't in there, click 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 the circle next to 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 home page 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.



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 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.

Event Statuses

When scheduling volunteers/participants for events, we'll only be using the following statuses:

Status	Use When
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.

Closing Out Events

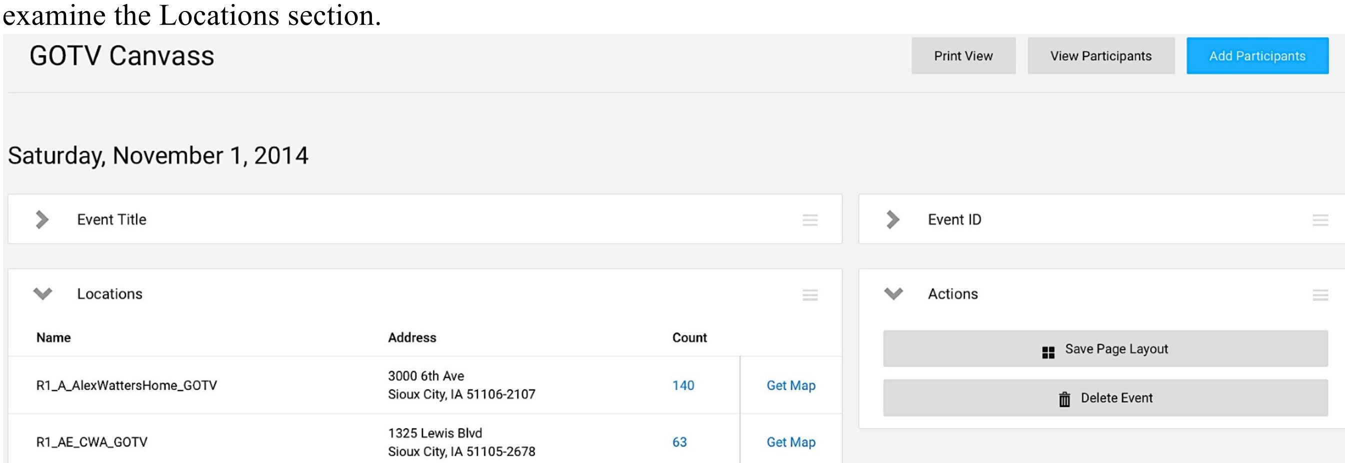
At the end of every day, all of the individuals scheduled in each event for that day must be closed out with a status that reflects what happened. **The only statuses that volunteers can have after the event is over are Declined, No Show, and Completed**.

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.

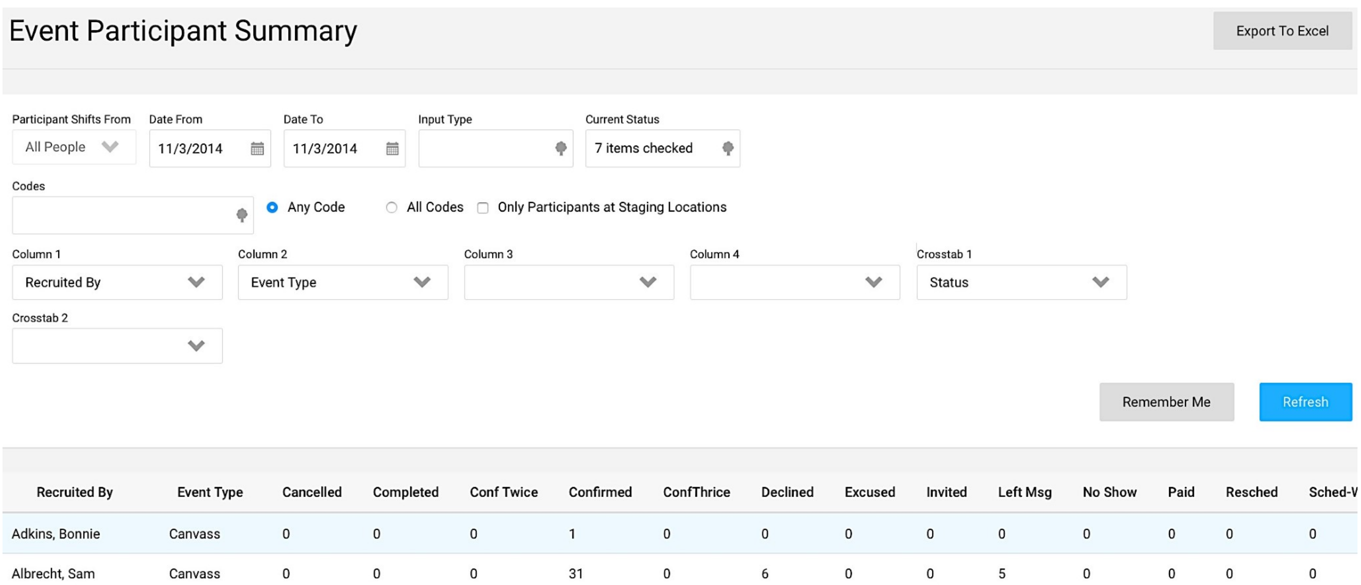
Event Participant List

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

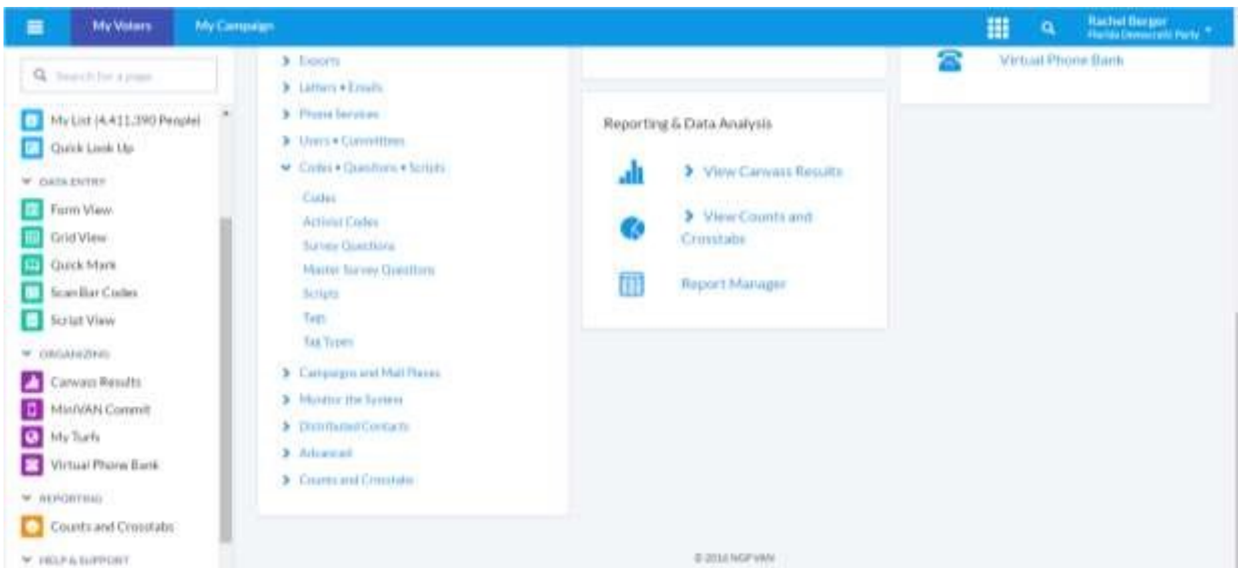
Another way to track volunteer statuses by the person they were recruited by involves using the Event Participant Summary in the Analyze Data section of My Campaign. Using the Columns and Crosstabs section, a user can narrow to Recruited By and Event Type in the Columns section and Status in the Crosstab 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.



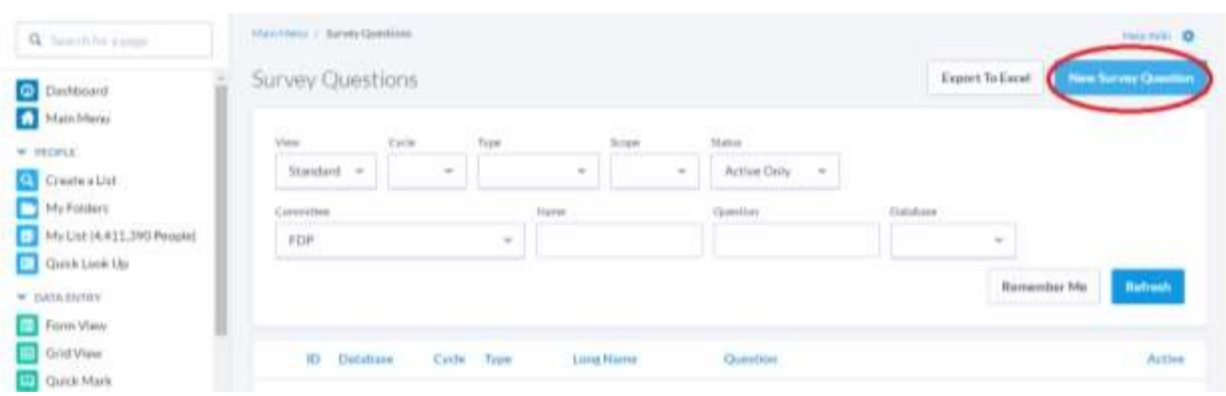
Recruited By	Event Type	Cancelled	Completed	Conf Twice	Confirmed	ConfThrice	Declined	Excused	Invited	Left Msg	No Show	Paid	Resched	Sched-V
Adkins, Bonnie	Canvass	0	0	0	1	0	0	0	0	0	0	0	0	0
Albrecht, Sam	Canvass	0	0	0	31	0	6	0	0	5	0	0	0	0

Survey Questions

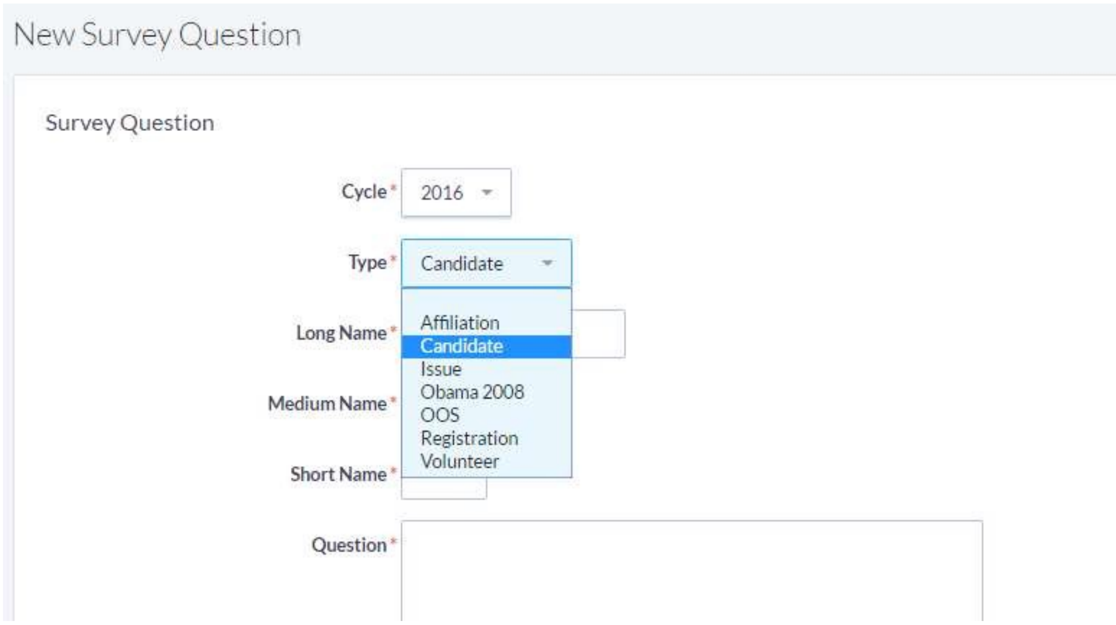
To create a new survey question, start on the home page of My Voters. Find **Codes • Questions • Scripts** in the left menu, then select **Survey Questions** from the drop-down menu.



On the next page, select **New Survey Question**.



Here you will find all of the fields necessary to generate a new survey question. First select the **Cycle** during which you are surveying voters. The next field is **Type**. The type is determined by the subject of the survey question.



Affiliation: Ex: do you support Democrats?

Candidate: Ex: do you support Barack Obama?

Issue: Ex: do you support legalizing medical marijuana?

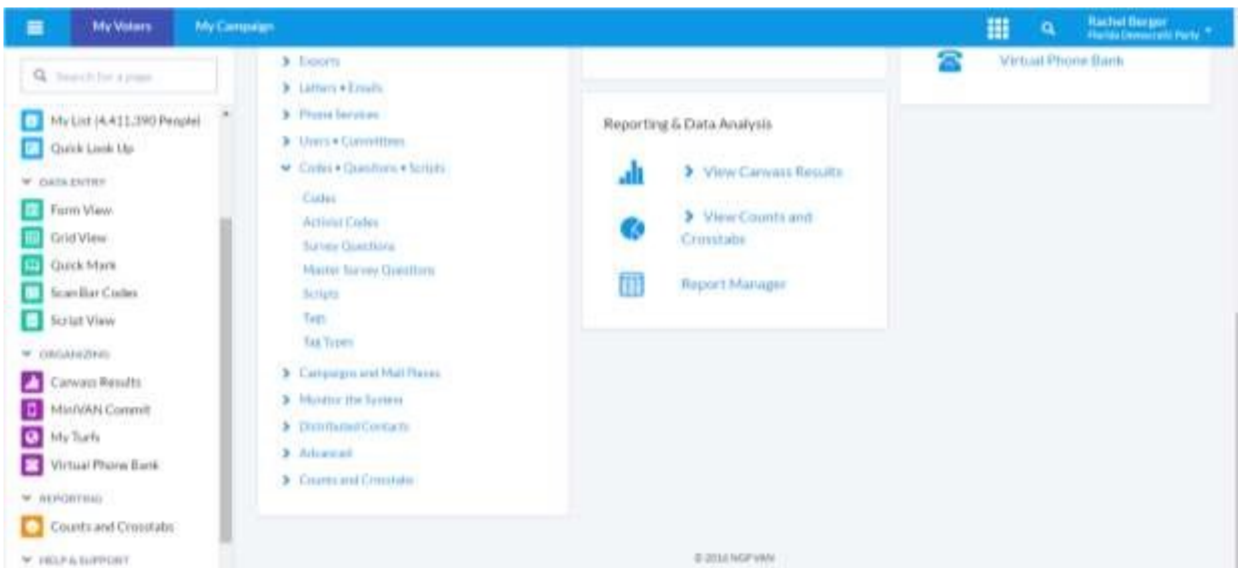
Registration: Ex: are you registered to vote by mail?

Volunteer: Ex: are you interested in volunteering?

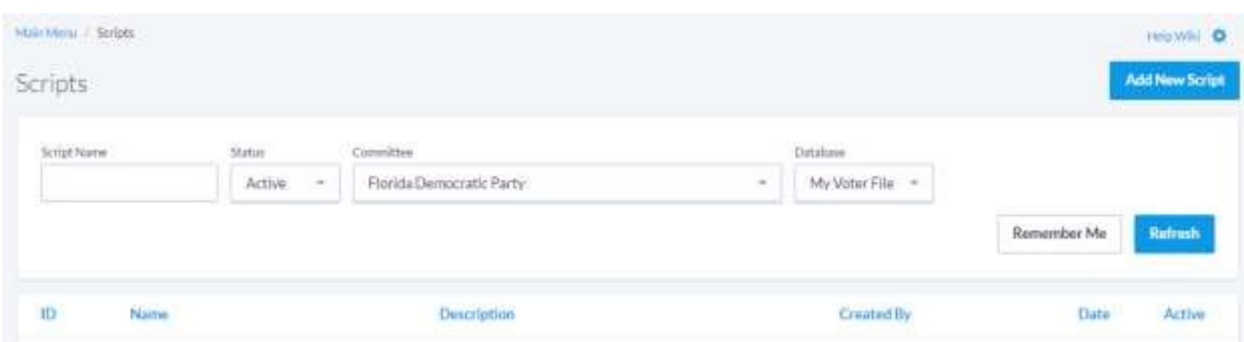
FL DEMS
Florida Democratic Party

Scripts

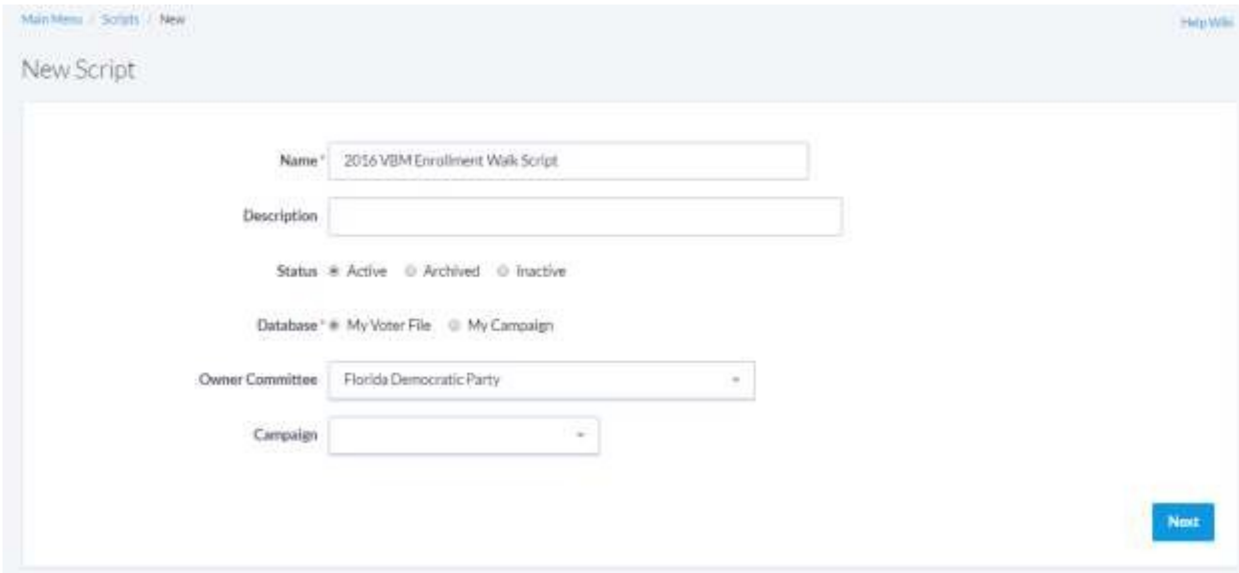
To create a new script, start on the home page of My Voters. Find **Codes • Questions • Scripts** in the left menu, then select **Scripts** from the drop-down menu.



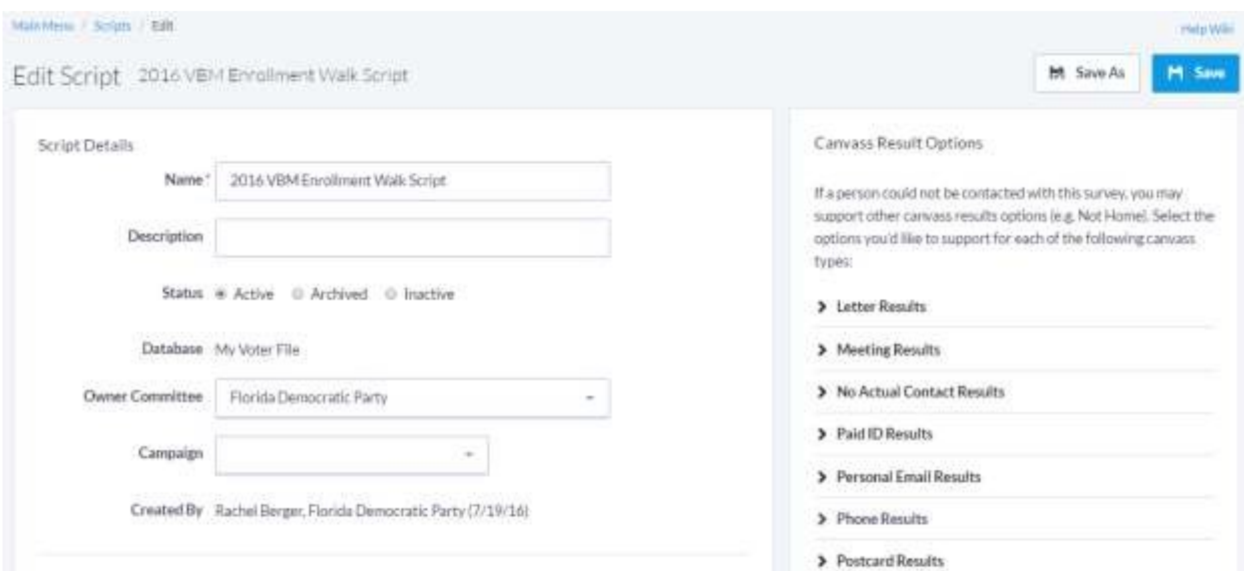
On the next page, you are able to view any scripts you have created previously. To create a new script, select **Add New Script**.



You will first need to name your script. The name of a script should be descriptive and include the type of canvass you are performing, such as Phone or Walk. It should also include the message of your canvass, for instance whether you are recruiting volunteers, or asking about registration. After naming your **Script**, click **Next.**



On this page you will be able to create the rest of your new script.

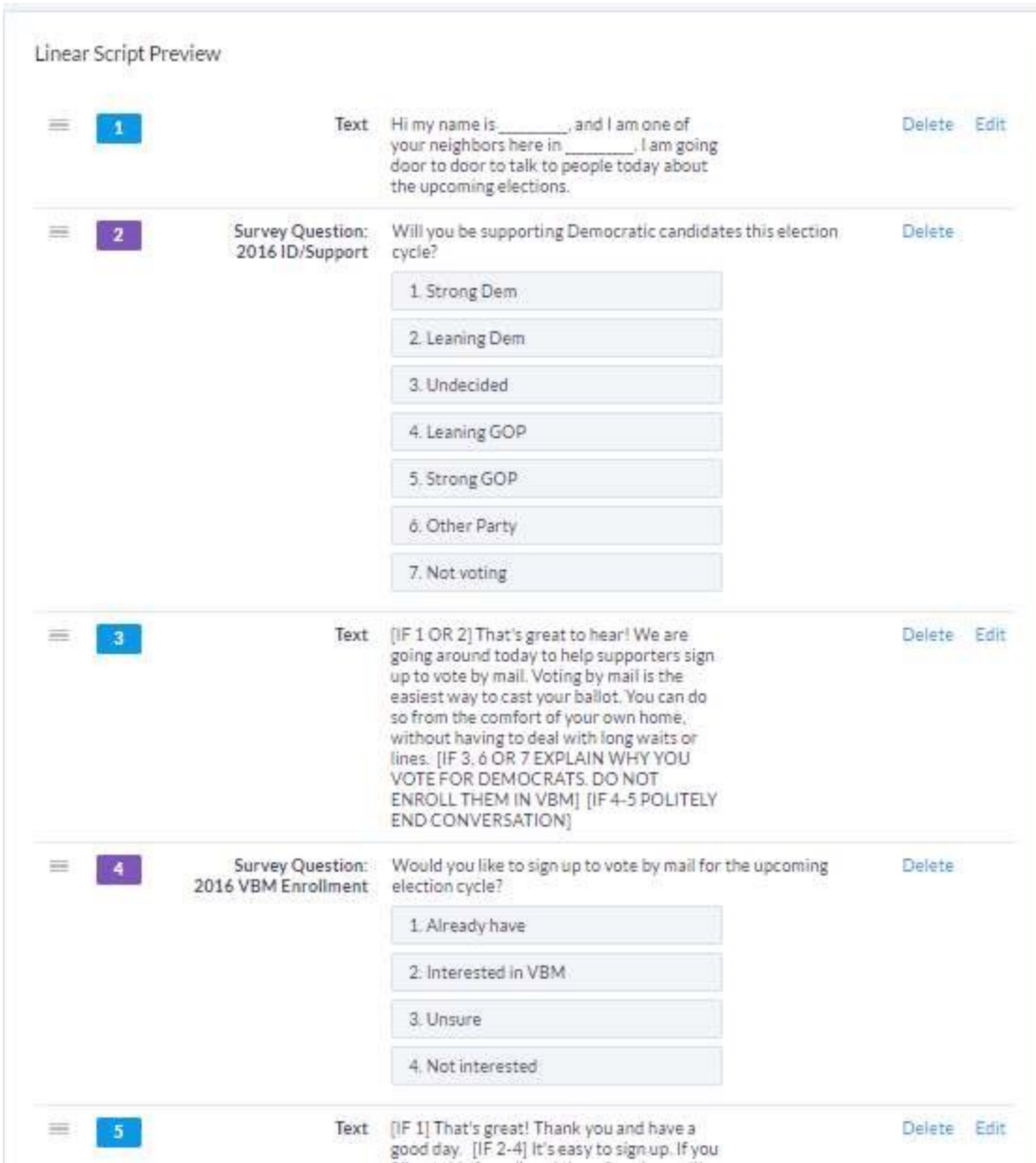


To add the text to your script, scroll down to **Add Script Element**. Here you will be able to insert the dialogue each canvasser will use with voters.

Text refers to the introduction canvassers will use to greet and respond to voters and to preface their survey questions. Once you enter text, make sure to click **Add** to put it in your script. You are also able to select any survey questions you have created from the **Survey Question** drop-down menu. (Refer to the Survey Questions Training Document to learn more about creating survey questions.) Make sure to **Add** the selected survey question to your script.

A preview of your script is available under **Linear Script Preview**. Here you are still able to edit and delete each individual script entry.

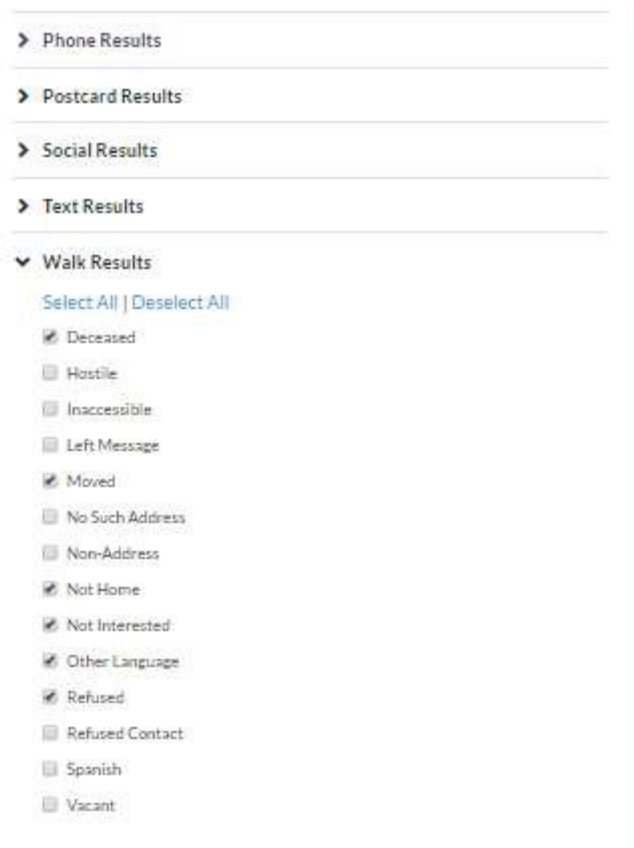
You are able to add multiple texts and survey questions. Adding Texts and Survey Questions in the order that canvassers will present them creates a conversational outline for each canvasser to follow.



To change the order of test and/or survey questions, simply select the gray symbol on the left side of the preview to drag each **Text** or **Survey Question** to their desired location.

On the right side of the page there is a menu for **Canvass Result Options**. This menu is organized by the type of canvass you preform. Choose your type of canvass, then select the response options you would like to use from the drop-down menu.

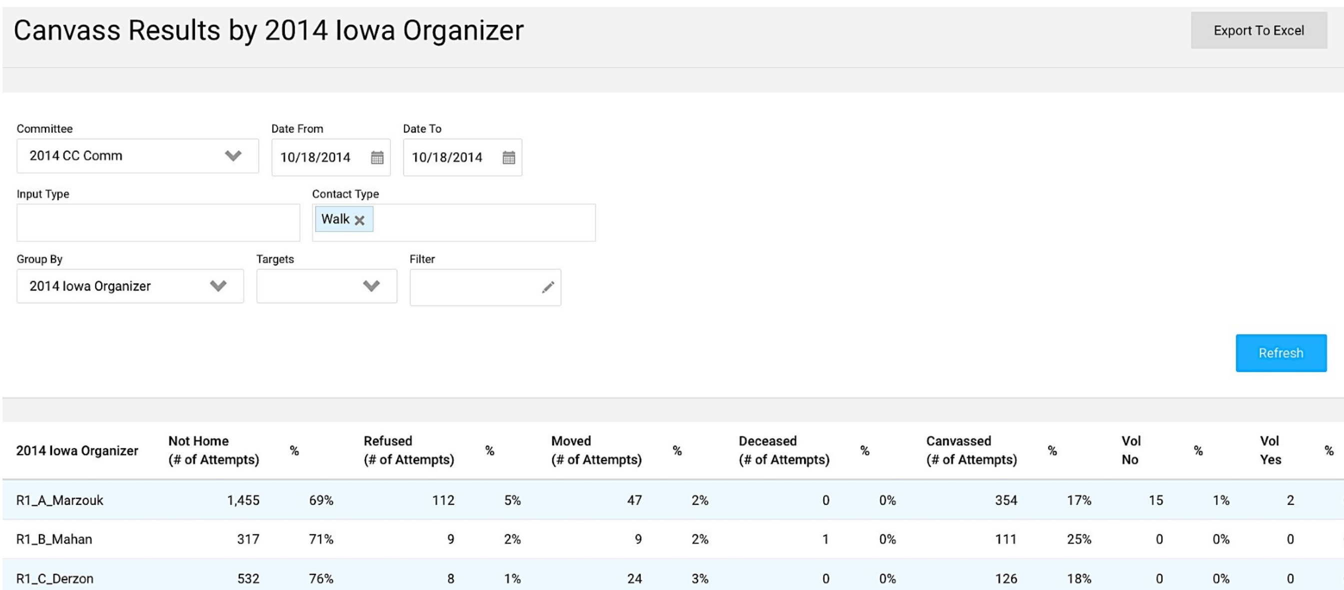
You are able to choose your own assortment of responses, but remember to include a response such as **Not Home** in case a voter is unable to be reached.



When you finish, be sure to **Save** your new script!

View Canvass Results

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.

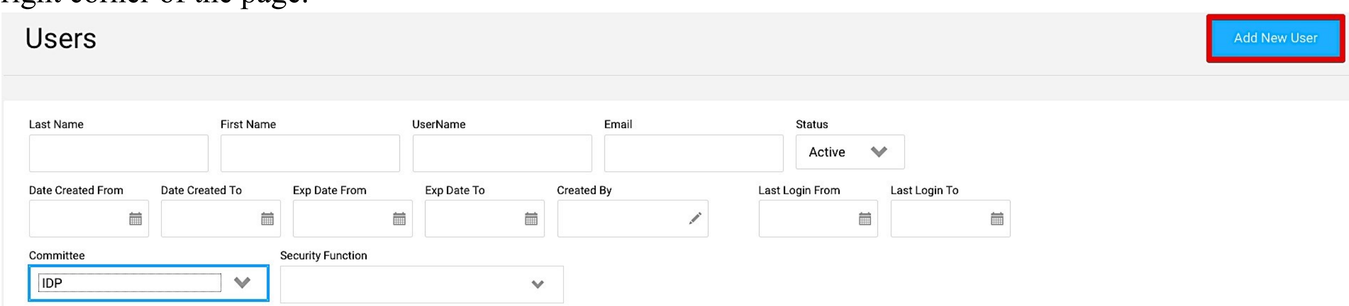


2014 Iowa Organizer	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Vol No	%	Vol Yes	%
R1_A_Marzouk	1,455	69%	112	5%	47	2%	0	0%	354	17%	15	1%	2	0
R1_B_Mahan	317	71%	9	2%	9	2%	1	0%	111	25%	0	0%	0	0
R1_C_Derzon	532	76%	8	1%	24	3%	0	0%	126	18%	0	0%	0	0

You'll notice in the picture 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.

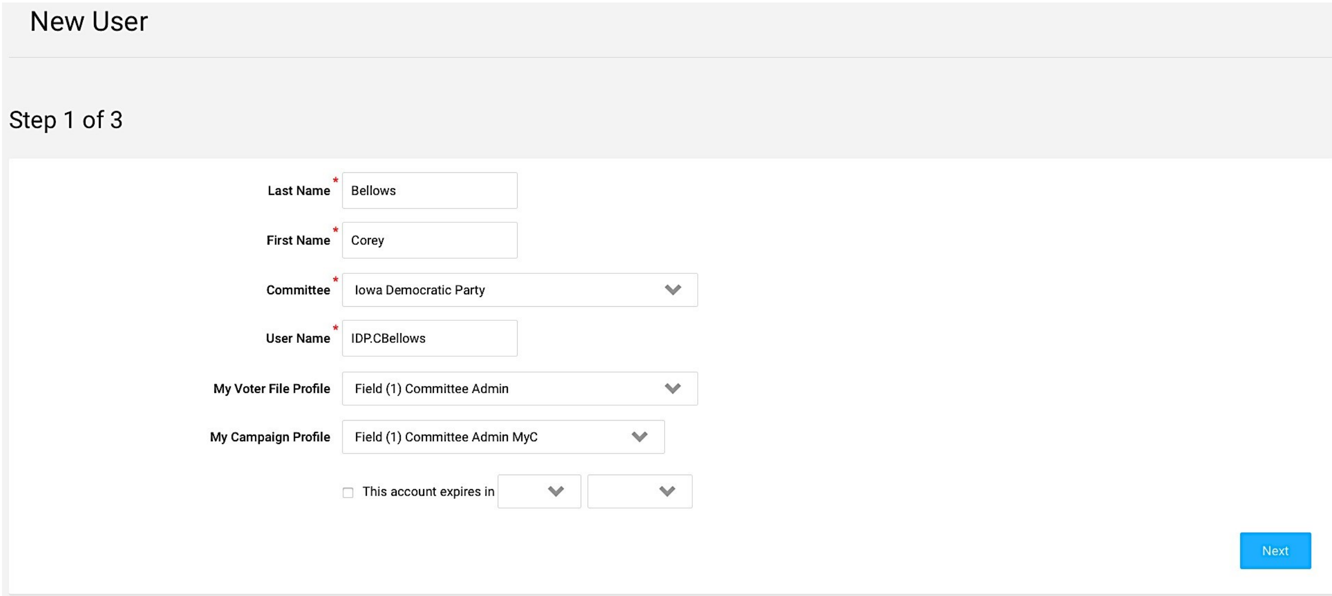
Creating VAN Accounts

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. My user name for example with the Iowa Democratic Party would be IDP.CBellows. Some other examples: HRC. for the Clinton campaign and MOM. for O'Malley.

For User Profiles: assign the appropriate access for the user in the Field hierarchal structure (example below). Presidential campaigns have their own set of profiles starting with the initials of their candidate.

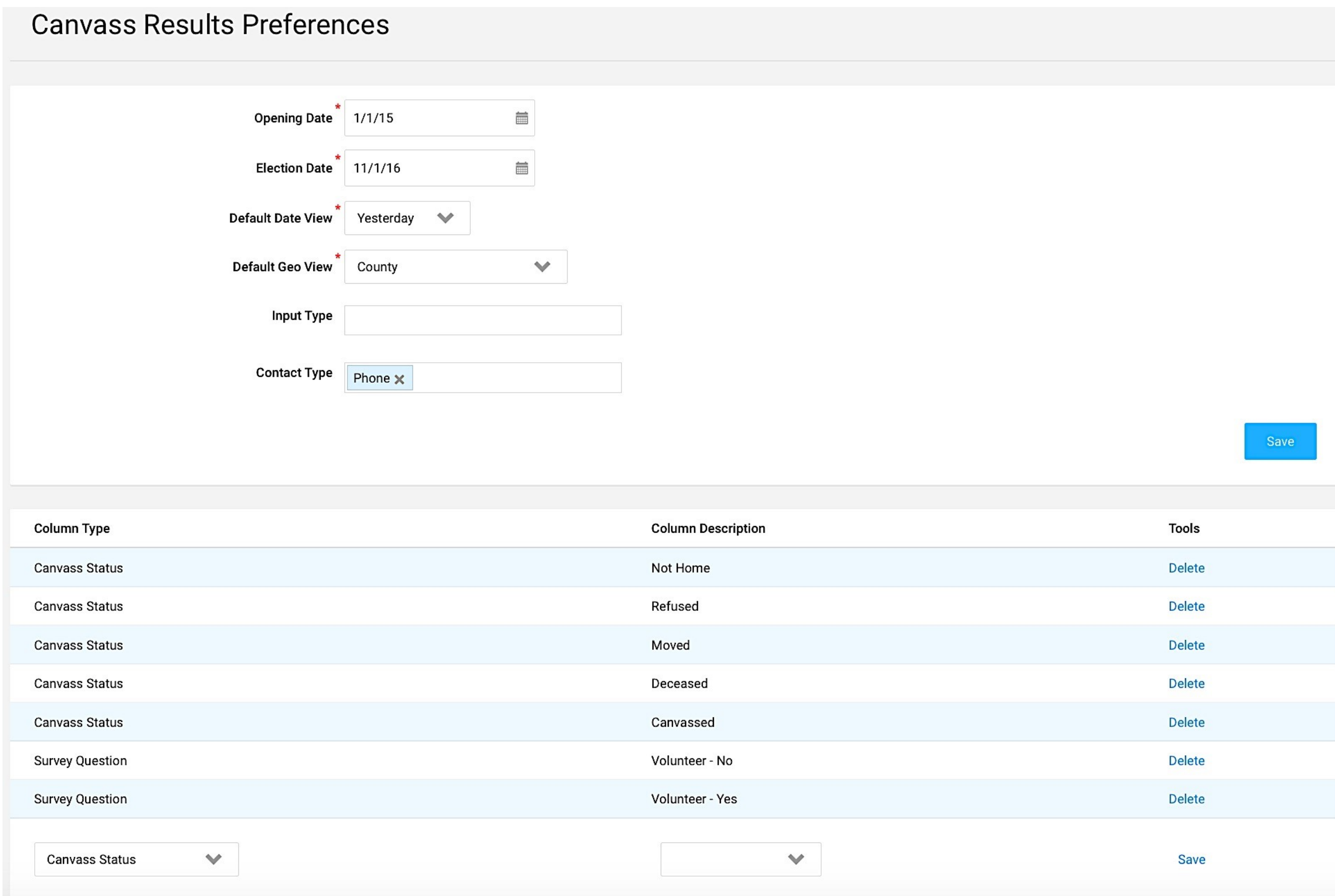


Step 2 is to assign regional access. Options include: statewide access, county, precinct, congressional, state house, state senate, city, and custom regions specific to a committee.

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.

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.

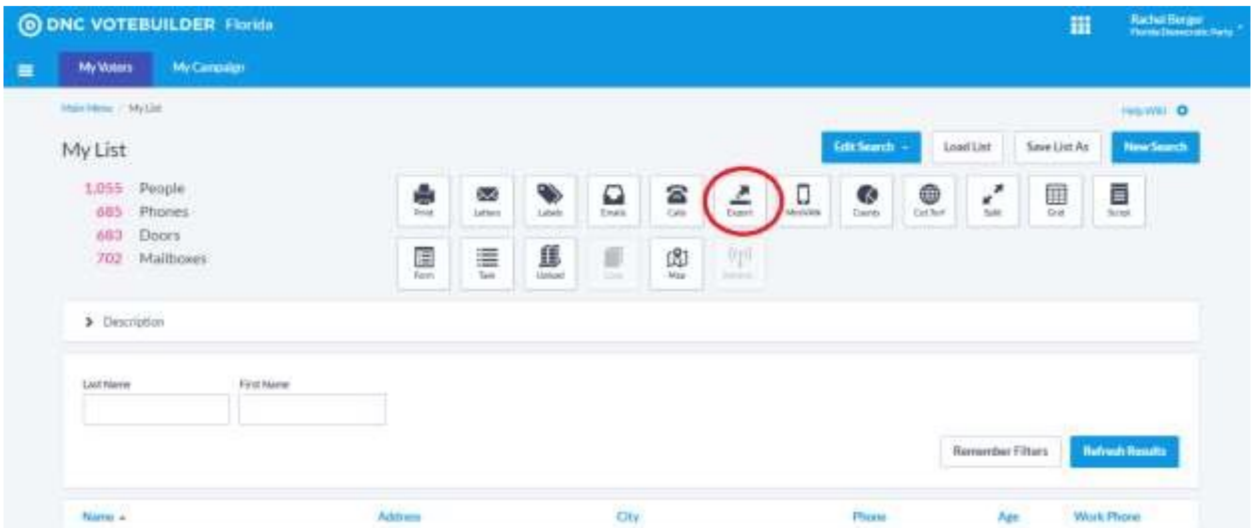


Canvass Results Preferences, you have the option to set the date it shows upon loading along with the geo view and contact type. The column type allows you to customize the statuses (EX: Not Home, Refused, Moved), survey questions (like candidate support, volunteer), and activist codes being shown.

Once you’re done customizing your preferences, click **Save** to finish.

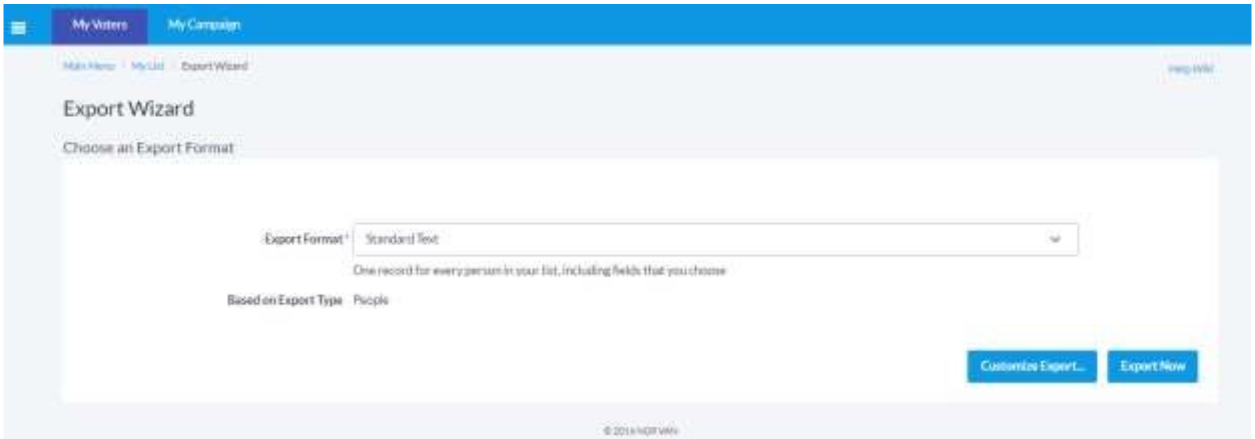
Exports

Start in **My List**, and near the top of the screen are the options to utilize the list you've created. Select **Export**.



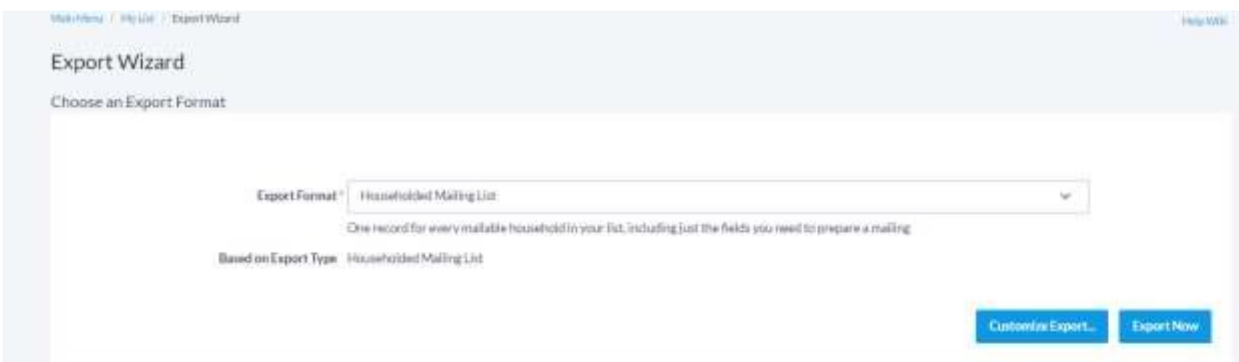
On the Export page, you will be able to select what type of export you want to create from the drop box. When selected, each export type will show a unique description beneath the drop box so that you are able to decide which type is best for the list you've created.

(If you are not seeing your saved formats or Standard Text in the drop box, you may have exceeded your export limit and will need to reduce the scope of your list to satisfy that limit.)

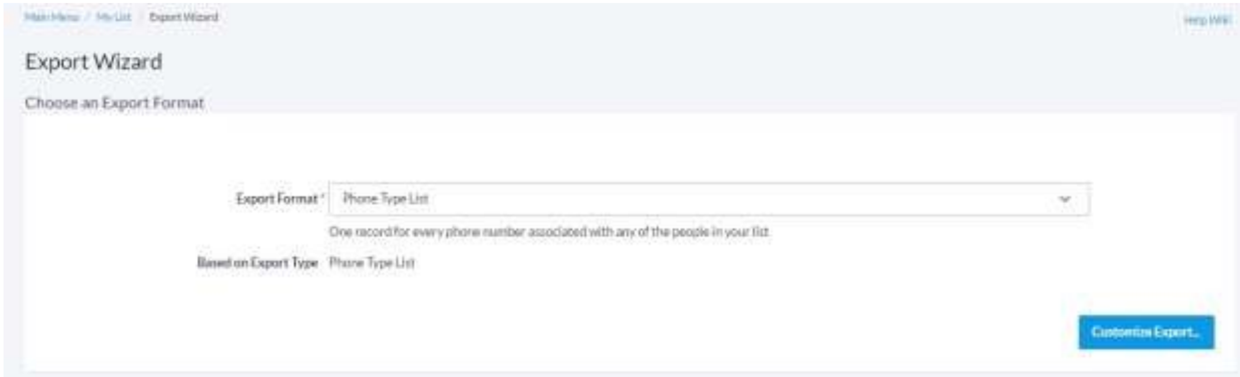


Standard Text is a useful option that gives you one record for each person on your list, with general fields including VAN ID, mailing address, and phone number.

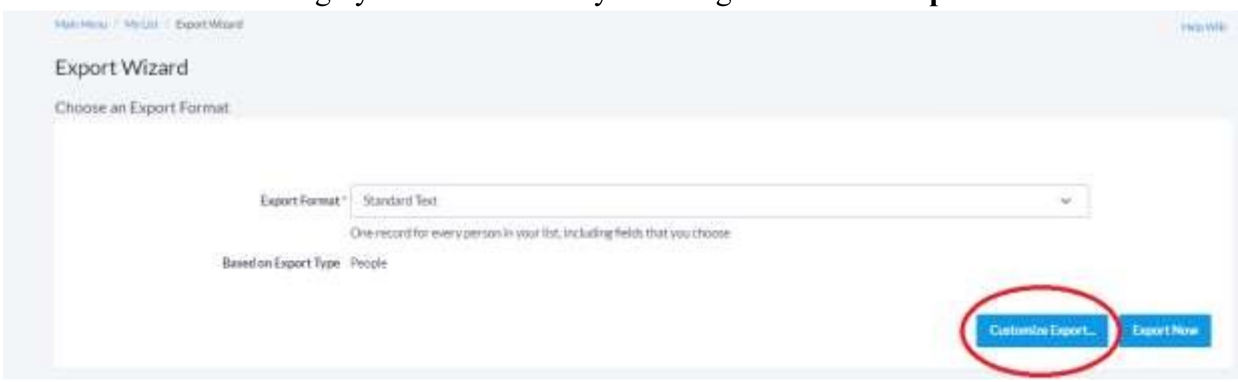
You are also able to select other formats to display your targeted information. For instance, one format type is Household Mailing List, which lists one record for every mailable household in your list.



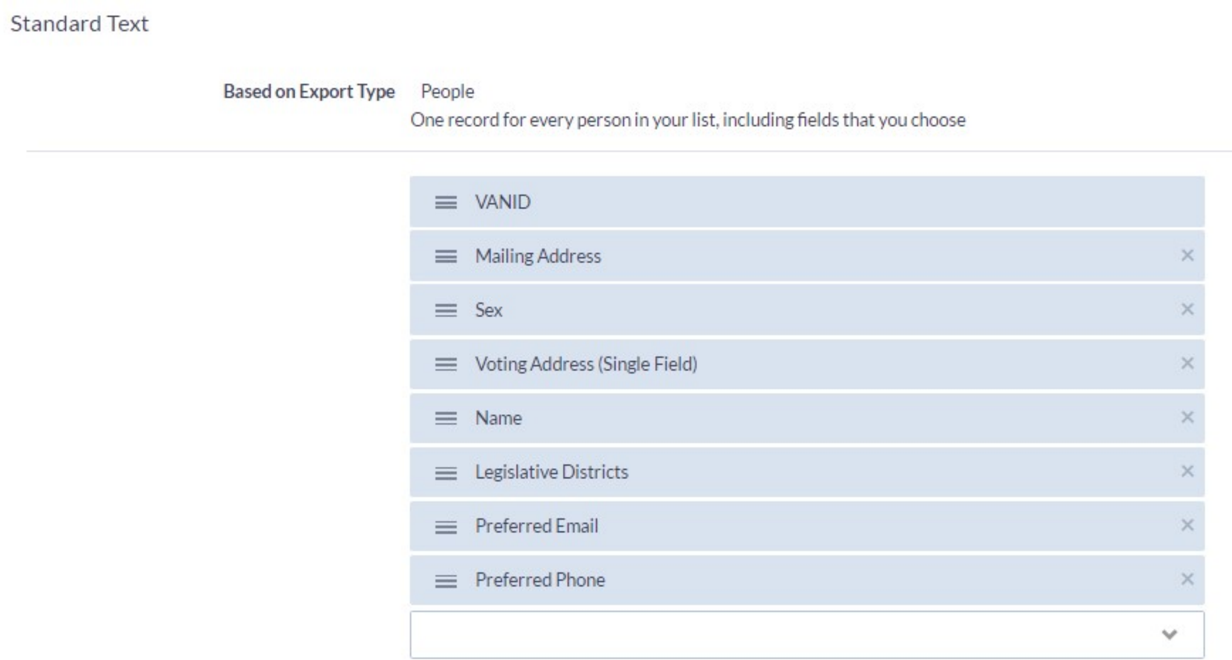
Another is Phone Type List, which shows one record for every phone number associated with any of the people in your list.



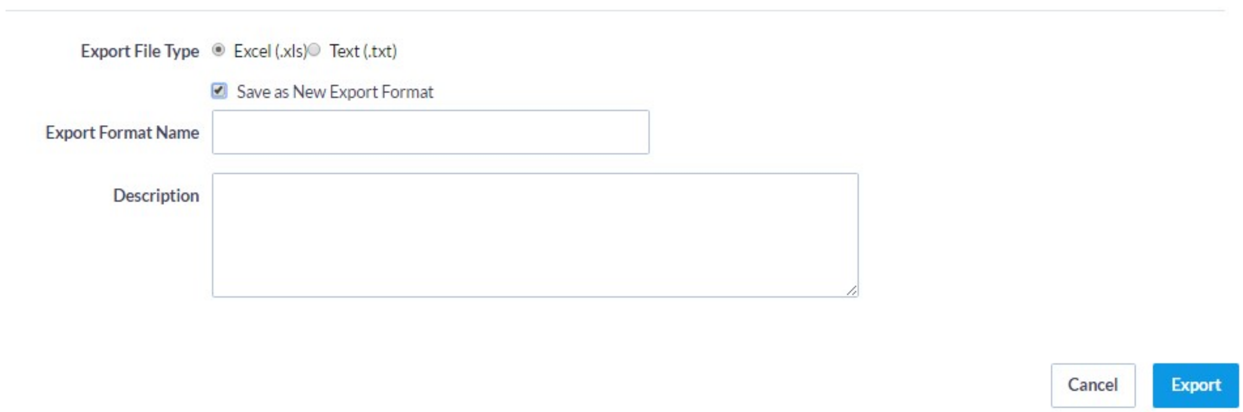
You are also able to design your own format by selecting **Customize Export**.



This option allows you to design your own export format by removing the standard fields and/or using the drop box to add others.

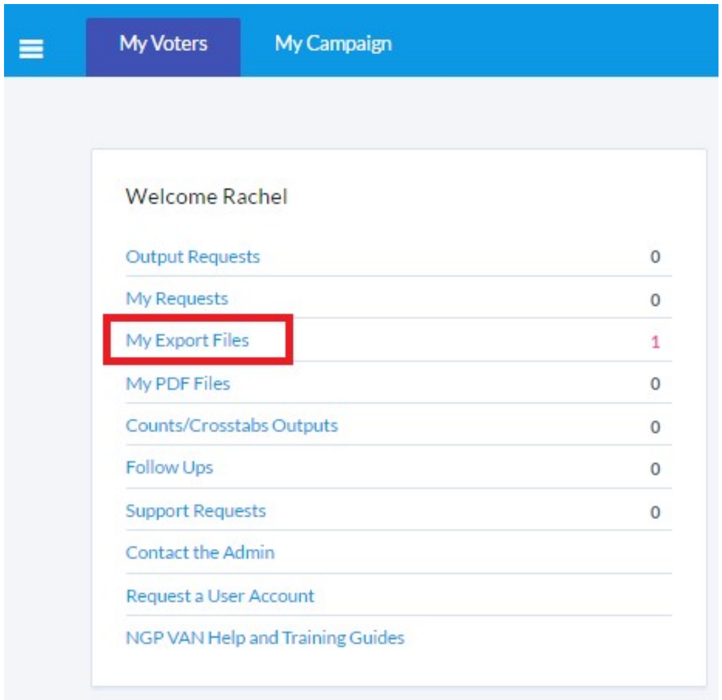


You can save custom formats for future exports by selecting **Save as New Export Format** before selecting Export.



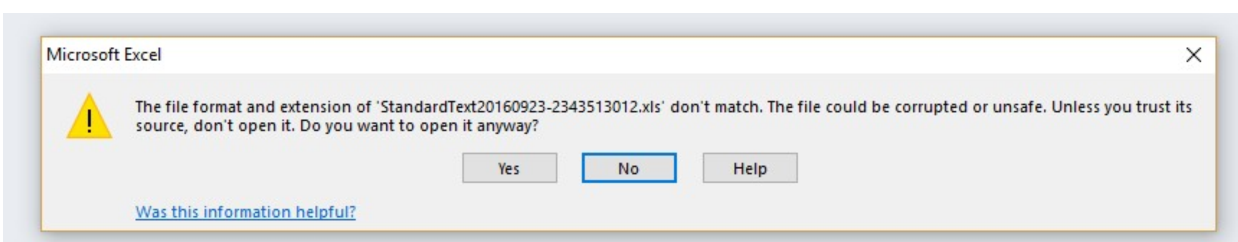
Click **Export Now** or **Export** once you have selected or customized your format.

To download your export, go back to the homepage. From here, select **My Export Files**.



This is where all of your exports will be. Select **Download File** to open an export on your computer.

If you see this message when you open your download, click **Yes** to view your exported list.



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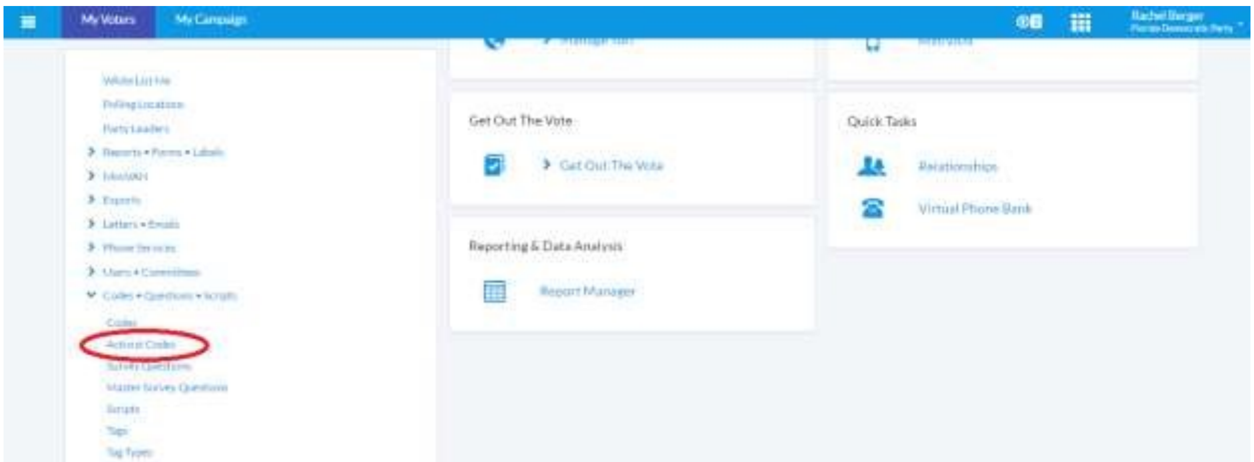
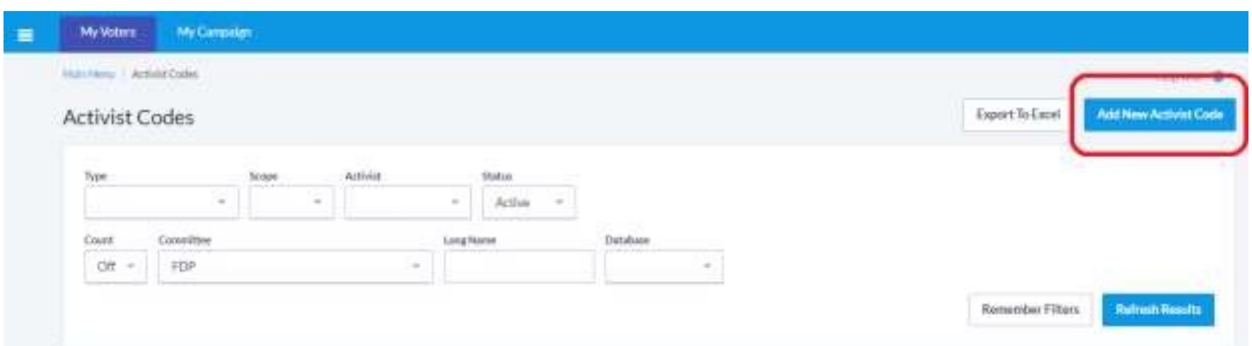
Activist Codes

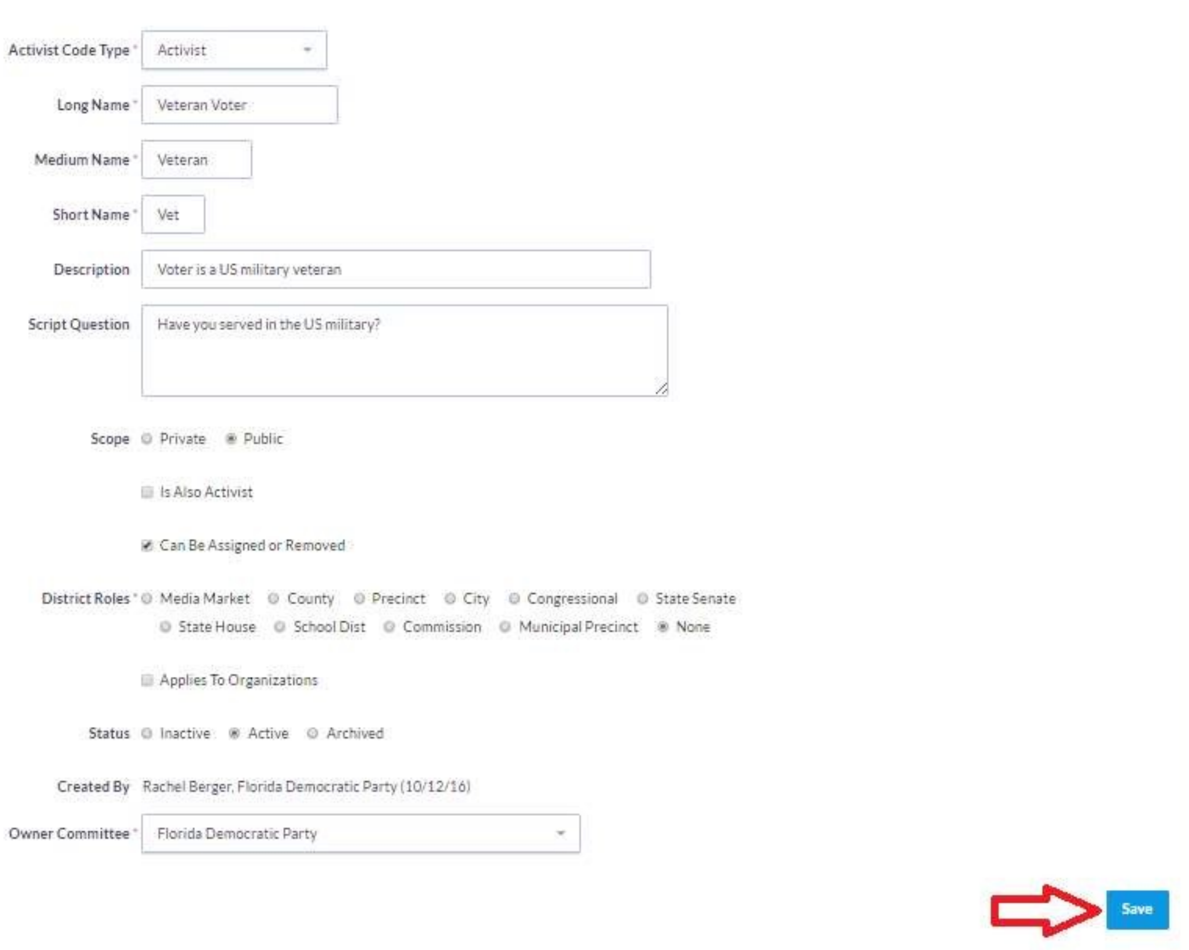
To create a new activist code, find **Activist Codes** under **Codes • Questions • Scripts** on the homepage.



Then select **Add New Activist Code**.



This will bring you to where you can customize your activist code by applying an **Activist Code Type** and names.



The **Long Name** will be the full name of your Activist Code. Adding a **Medium** and **Short** version of the name will allow the system to choose between the variations for display purposes. It will display the **Long Name** when possible, and the **Medium** and **Short Names** when space is limited.

In the **Description** box you are able to explain the meaning of the activist code you are creating as it is being applied to voters.

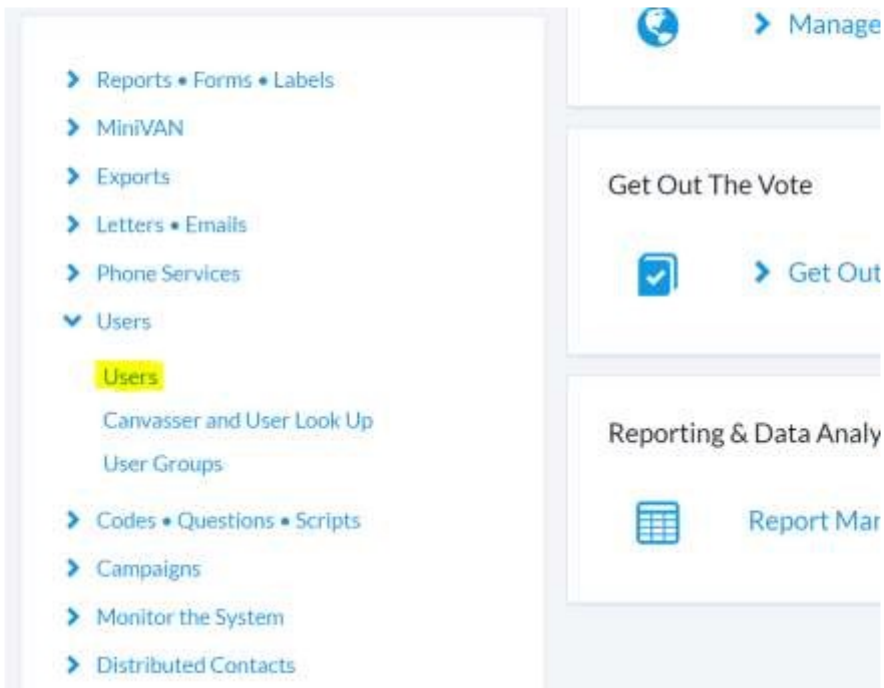
Script Question is an optional addition to your code that will be added to canvassers' scripts in order to ask voters.

The **Scope** determines who can view the activist code when it is assigned to voters. When a **Private** activist code is applied, only users on the same committee that assigned the code will be able to see the code on the voters it is assigned to. When marked **Public**, other committees are able to view your activist code as it is has been assigned to voters.

Click **Save** to save your activist code.

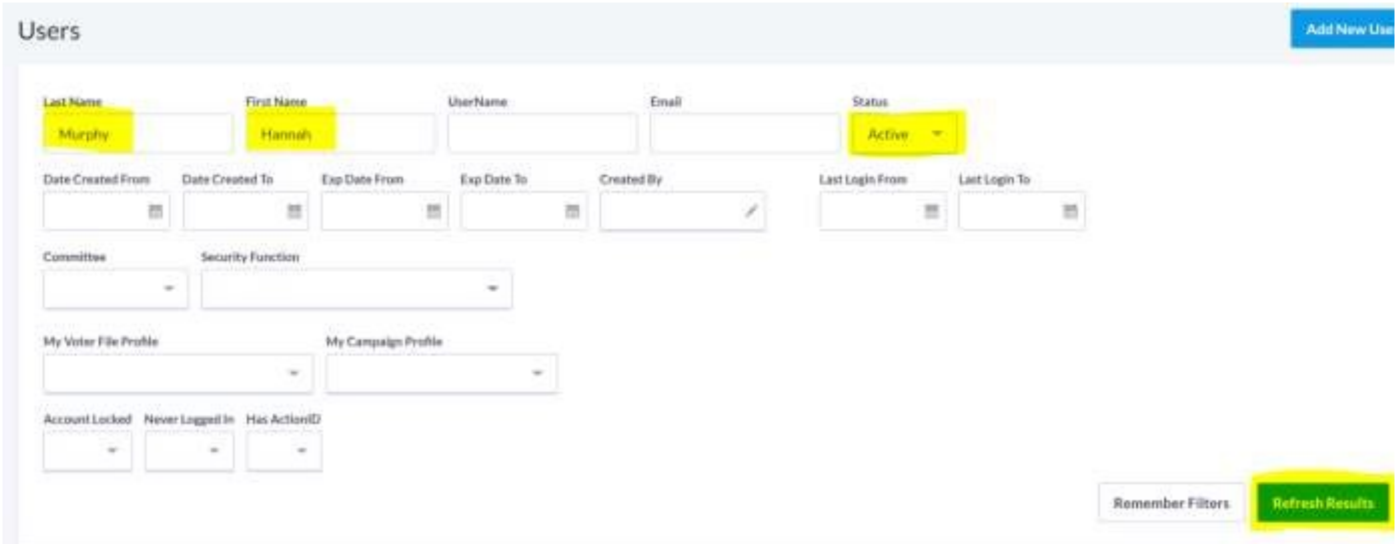
Deactivating Users

In order to deactivate an active user, you will need to start on the home page and go to the administrator column on the left. Click on **Users**, then Users beneath it to get to the Users Menu.



On the next page you should see a search menu. The Status field will automatically be set to **Active**, showing you the list of users who currently have active accounts, granting them access to Votebuilder. You may also search for a specific user by typing in their First and Last Name, Username, ***or*** Email.

(Helpful hint: Start by searching with as little information as possible, so as to avoid a search that is too narrow or mismatched)



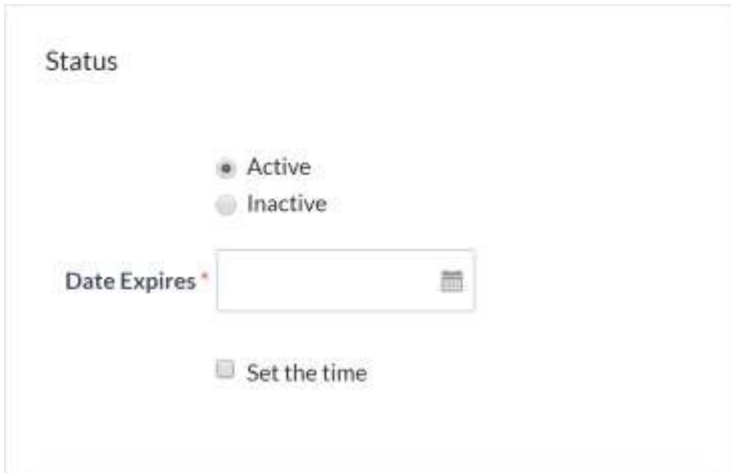
To run the search click on **Refresh Results**.

By scrolling down, you should see all of the users in your committee(s) that match the search you have run. If the user name is in **blue**, you can click into that user's profile.


Add all 30 results to selection

Name	Committee	My Voter File Profile
10FDP, Intern	Florida Democratic Party	101 - FDP Intern
1FDP, Intern	Florida Democratic Party	101 - FDP Intern
2016VPB, 22	Florida Democratic Party	001 - Phone Banker
2FDP, Intern	Florida Democratic Party	101 - FDP Intern
4FDP, Intern	Florida Democratic Party	101 - FDP Intern

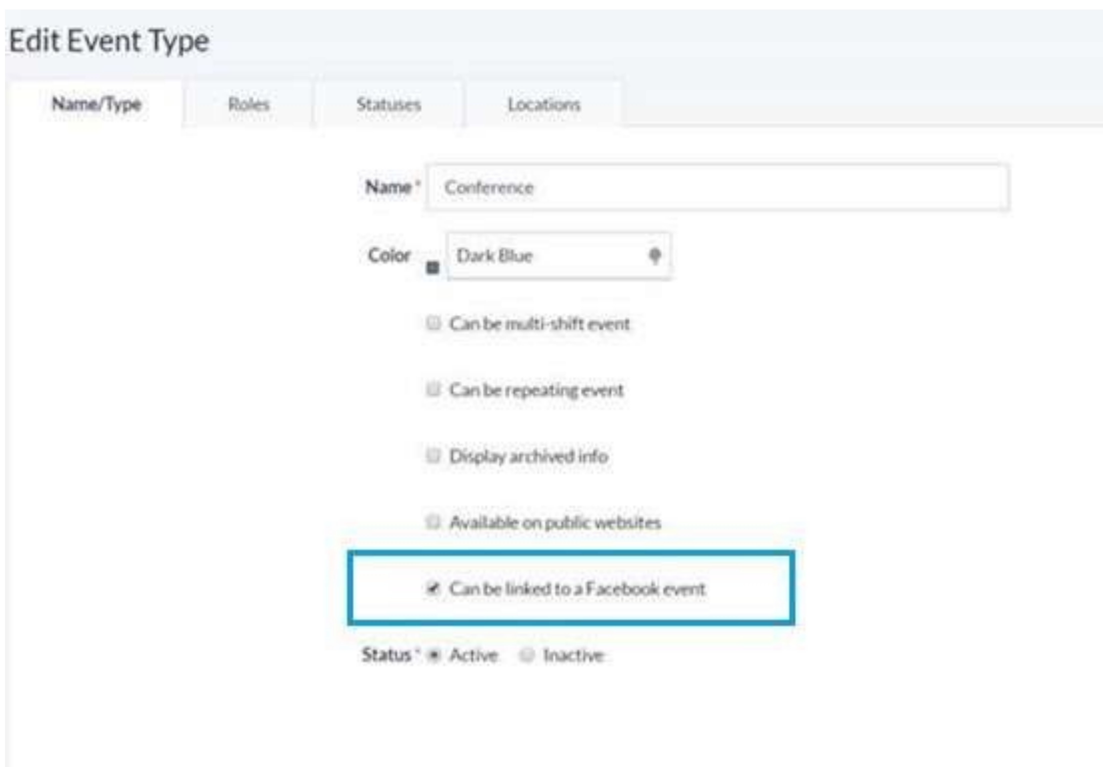
On the user's profile page, the status fields will be in the top right corner. Click on the radio button next to **Inactive** to deactivate the user account and block access to all VAN committees.



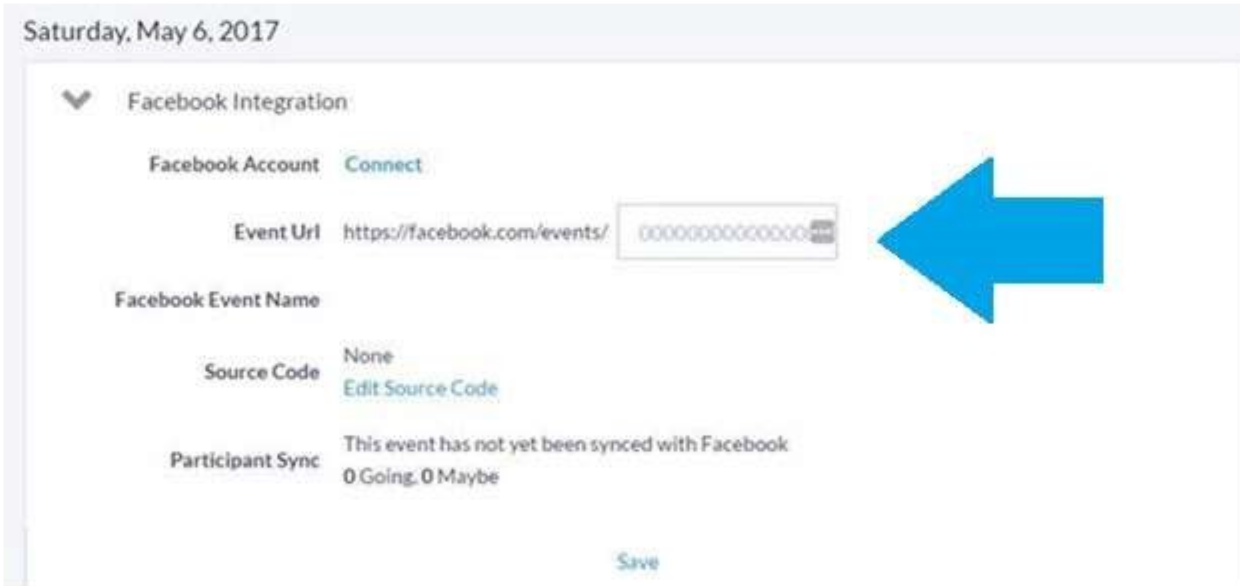
A popup window will appear asking you to confirm this. Click **OK**, and the process is complete.

FACEBOOK EVENTS

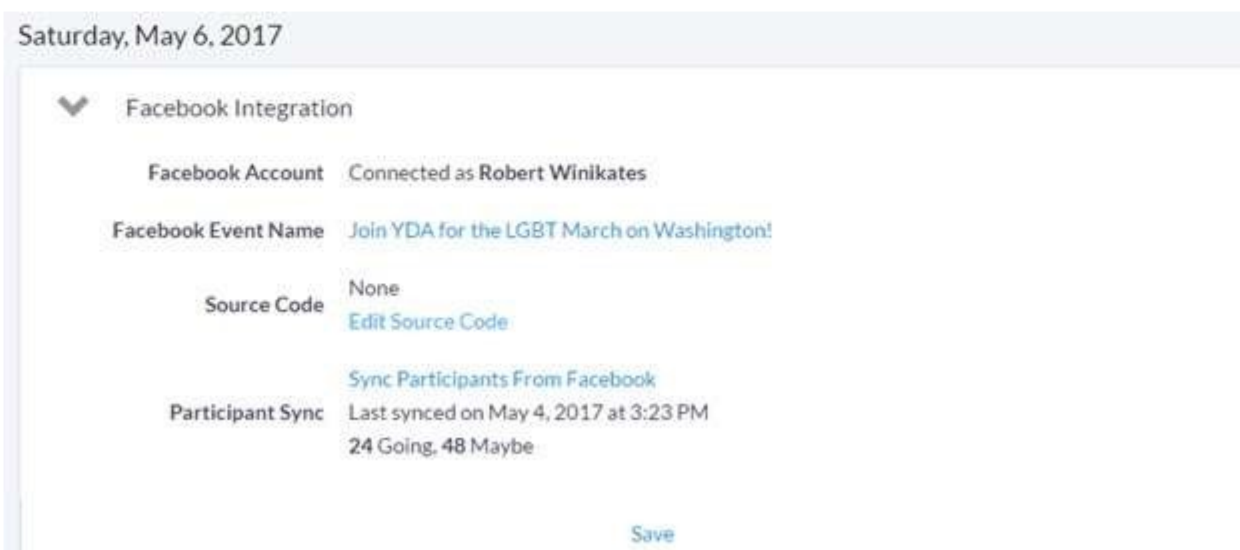
First, users will need to **enable Facebook Events on specific Event Types** in VAN. This can be done by editing an existing Event Type (or creating a new one) in the Name/Type step in the Event Type wizard and designating it with the "can be linked to a Facebook Event." At this point, the option to sync to a Facebook Event will be available for all Events created with that Event Type.



After users create the Event in VAN, they must **enter the ID** for a Public Facebook Event into the details page for the Event. (Users will need to log into Facebook with a valid account upon clicking 'Connect' next to Facebook Account).



Once connected, we'll provide users with **a link to the Facebook event** as well as a summary of attendees. (Please see image below). When a person signs up through Facebook, we'll capture their First and Last Name and will create a contact record with the details of that Event signup. An optional Code can be applied to the contact record. We will collect information for the first 1,000 people who sign up through Facebook.



Each Event signup record will have the "Facebook RSVP" role recorded. In addition to the role, records created through the Facebook Event sync will have either an Event status of "FB Going" or "FB Maybe," which is directly related to their "Going" or "Interested" status within Facebook.

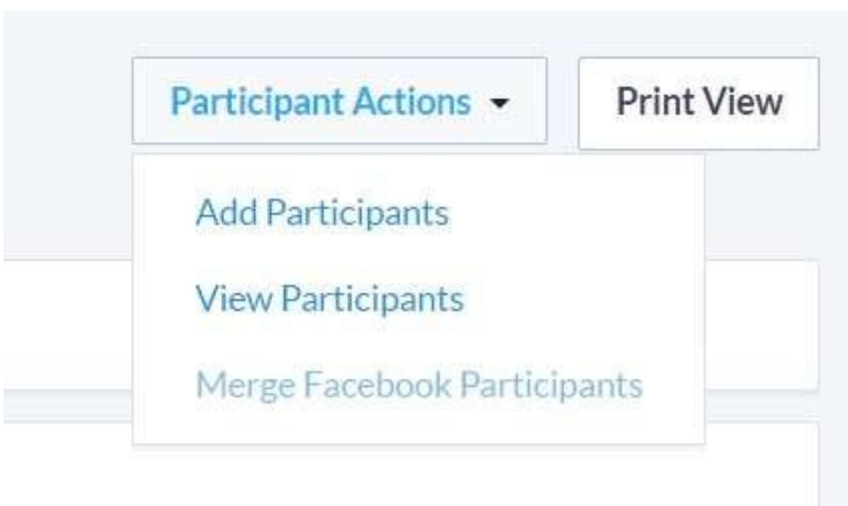

Participants Summary

	Invited	Confirmed	Wait List	FB Going	FB Maybe
Attendee	0	0	0	0	0
Facebook RSVP	0	0	0	24	48

View All Participants Edit Event Roles

Unfortunately, Facebook **limits the amount of fields available** for this sync to First and Last Name and the link to the Facebook ID. We recognize in some instances this may create duplicate records, so we've made it easier to search for likely duplicates among Facebook signup records.

From the Event details page, users can select a **"Merge Facebook Participants"** option. The merge process will help identify potential duplicates based on first and last name against existing contact records.

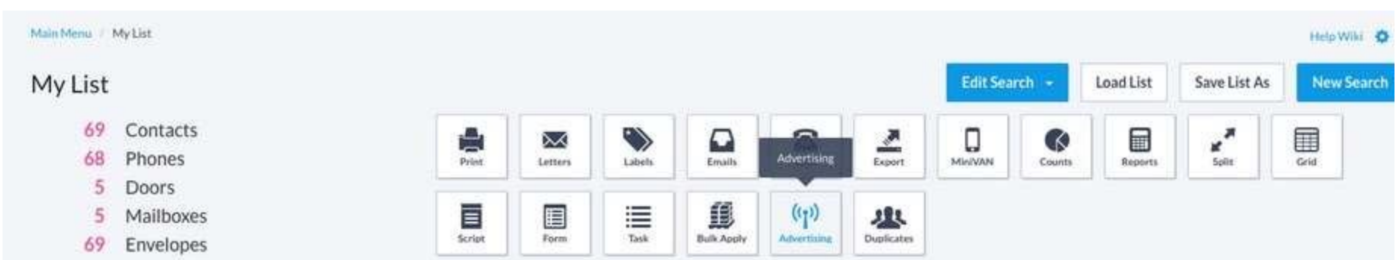


FACEBOOK AD INTEGRATION

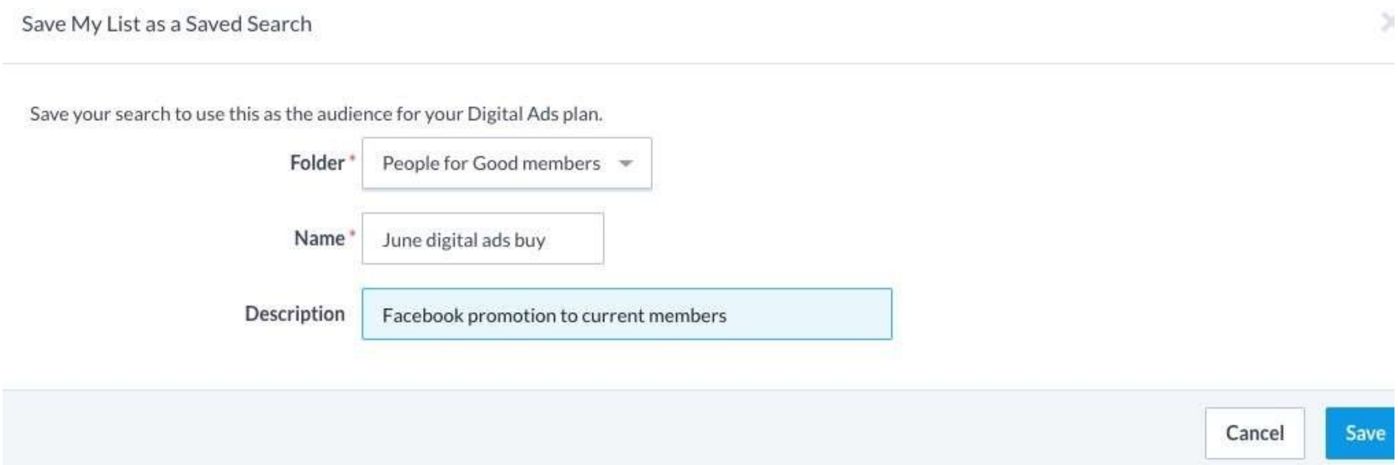
The new functionality will give users the option to indicate which contact records were targeted for the ads, thereby allowing users to measure both the short-term results of their ads, as well as the long-term results of how those ads increase participation and engagement.

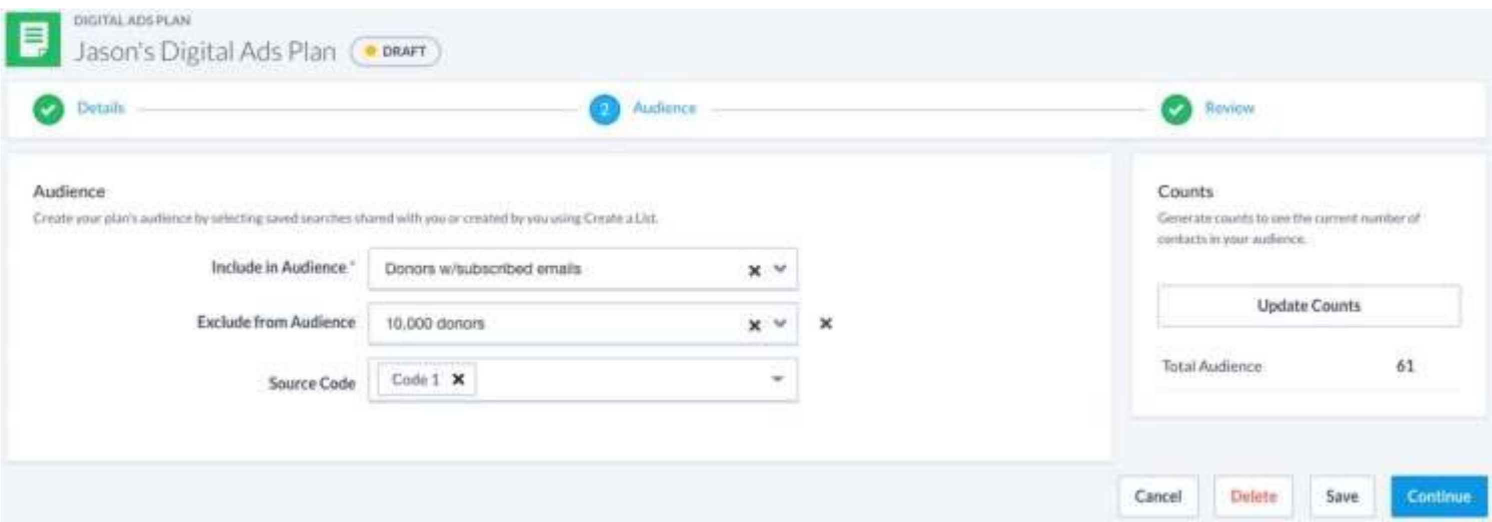
This functionality is available only in My Campaign databases (or My Members and My Workers for clients who use those databases) and is controlled by a new security function called, "**Create and Edit Digital Ad Plans**."

Users can send a list directly from My List by clicking on the Advertising button.



Clicking on this button brings up a modal to save the current list as a new Saved Search, which is placed in a Folder. The Plan Name and Description are also set in this modal. Once users click the "Save" button, these values carry through directly into the new plan, and users will land on the Details step.

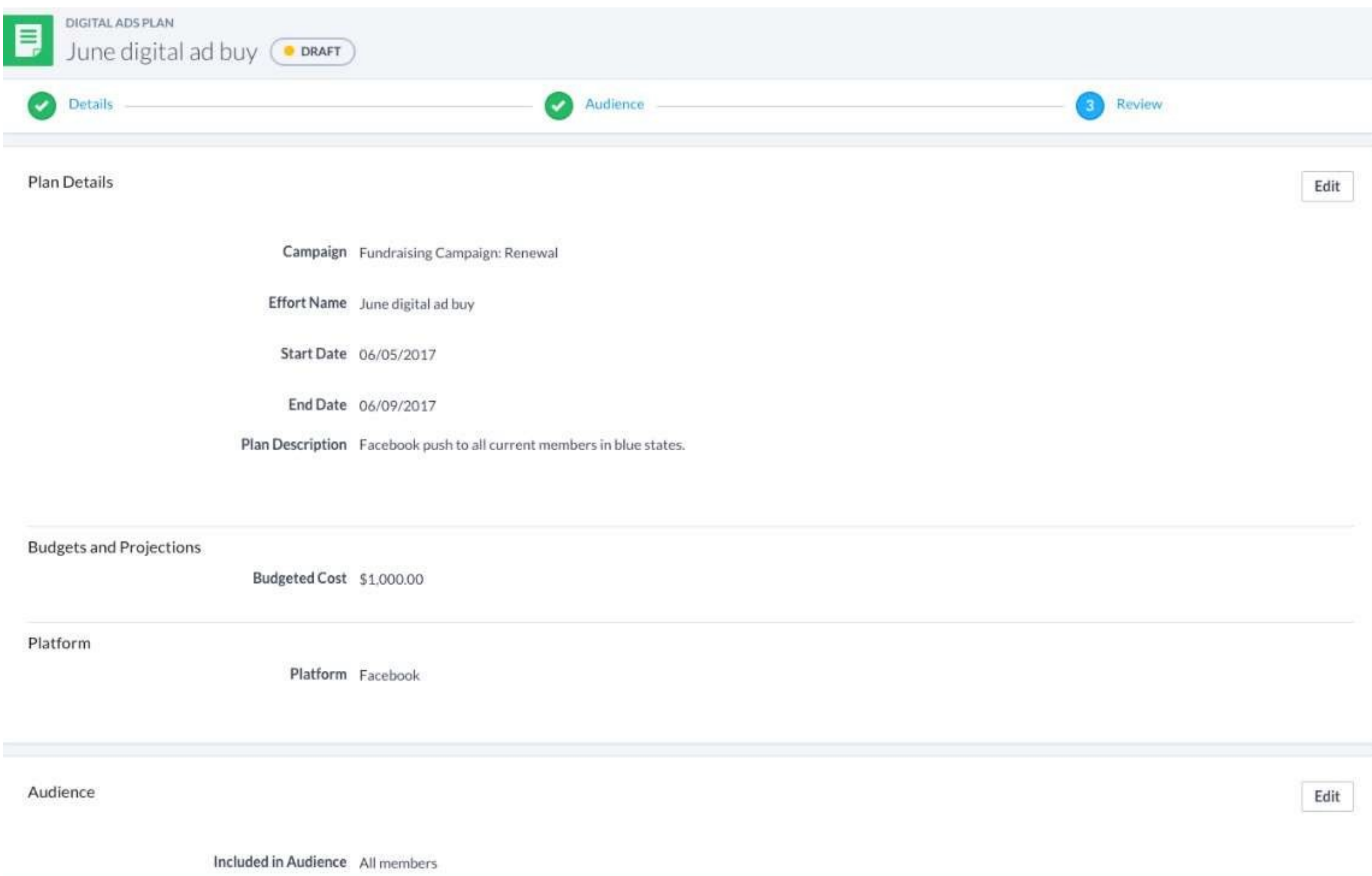


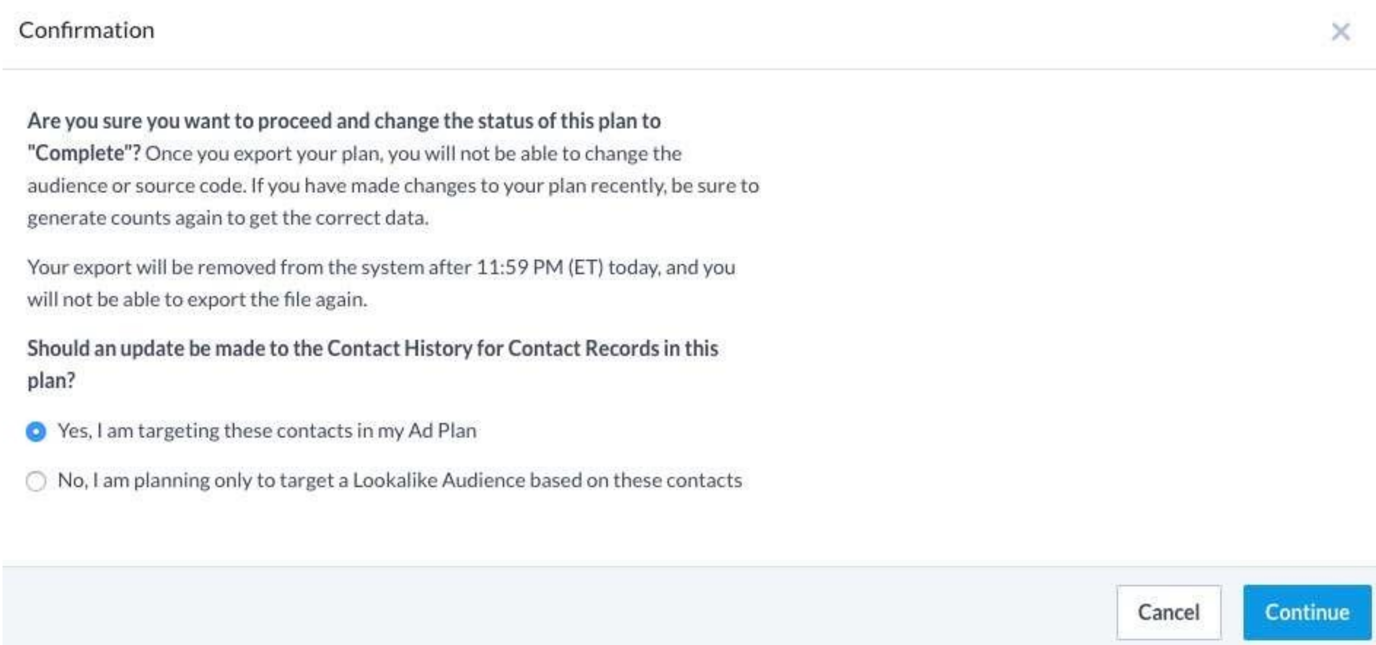


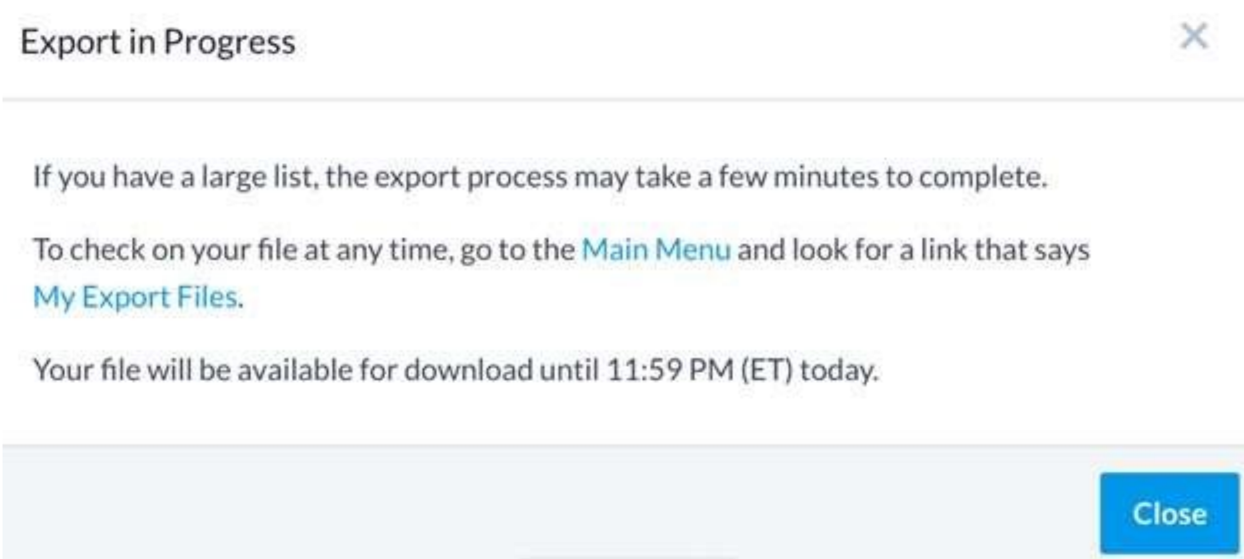
In the second step (Audience) users will first select an overall audience/universe from a Saved Search to which they have access. Optionally users can also select an exclusion audience which will be removed from the overall universe before any segmentation is done. Lastly, users can assign a Source Code to the plan to track results in reporting. Clicking on the 'Update Counts' button will prompt the system to run a real-time update of the numbers using the selected Saved Search(es).

In the final step (Review), users have the ability to look over all aspects of the plan in a read-only format. Edit buttons allow users to navigate back to a particular step. At this point a plan can be exported as a tab-delimited text file.

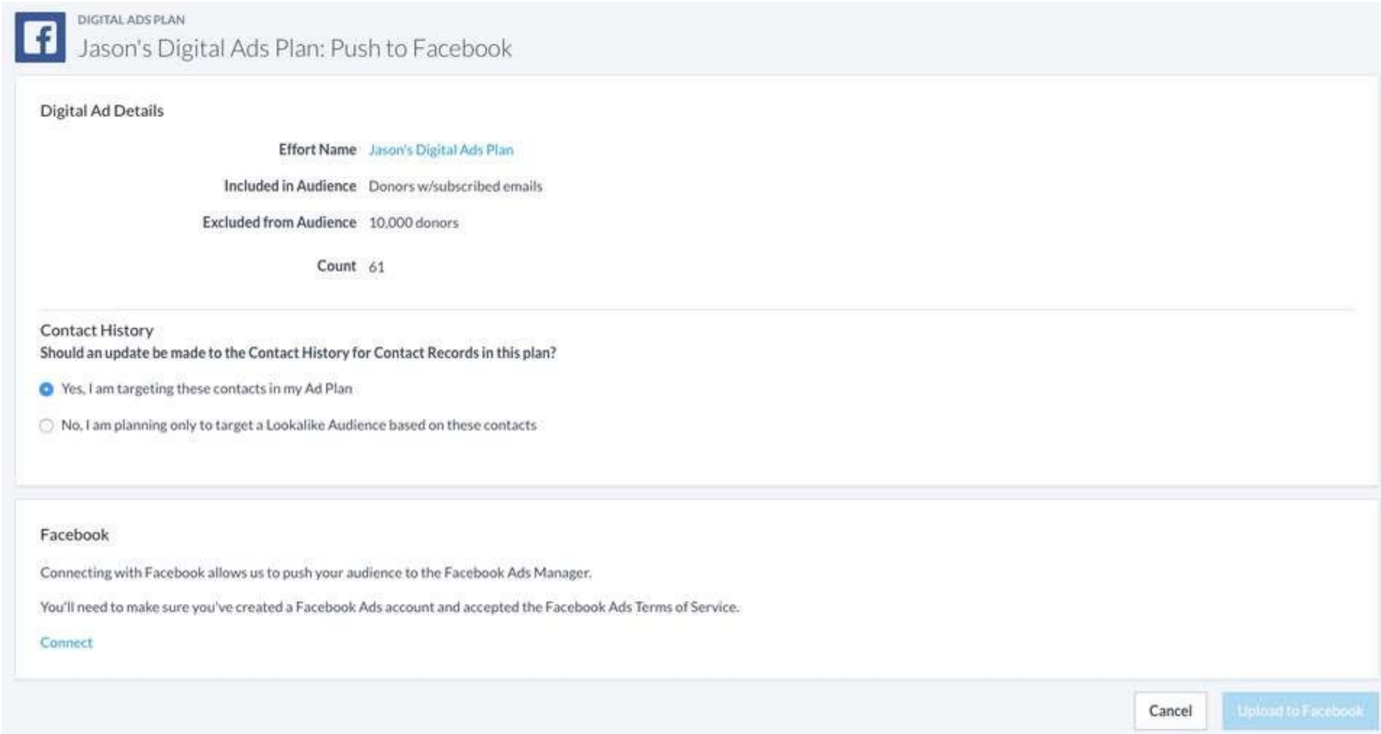
Users will then receive a warning that this action is permanent and that the plan's status will be changed to 'Complete.' In the first pop-up modal, users can set if Contact History should be updated for contact records in the plan or not. The display for this on the contact record is shown in the Direct Response Efforts page section and in the Contact History page section. The export files will be available as shown in a second pop-up modal.







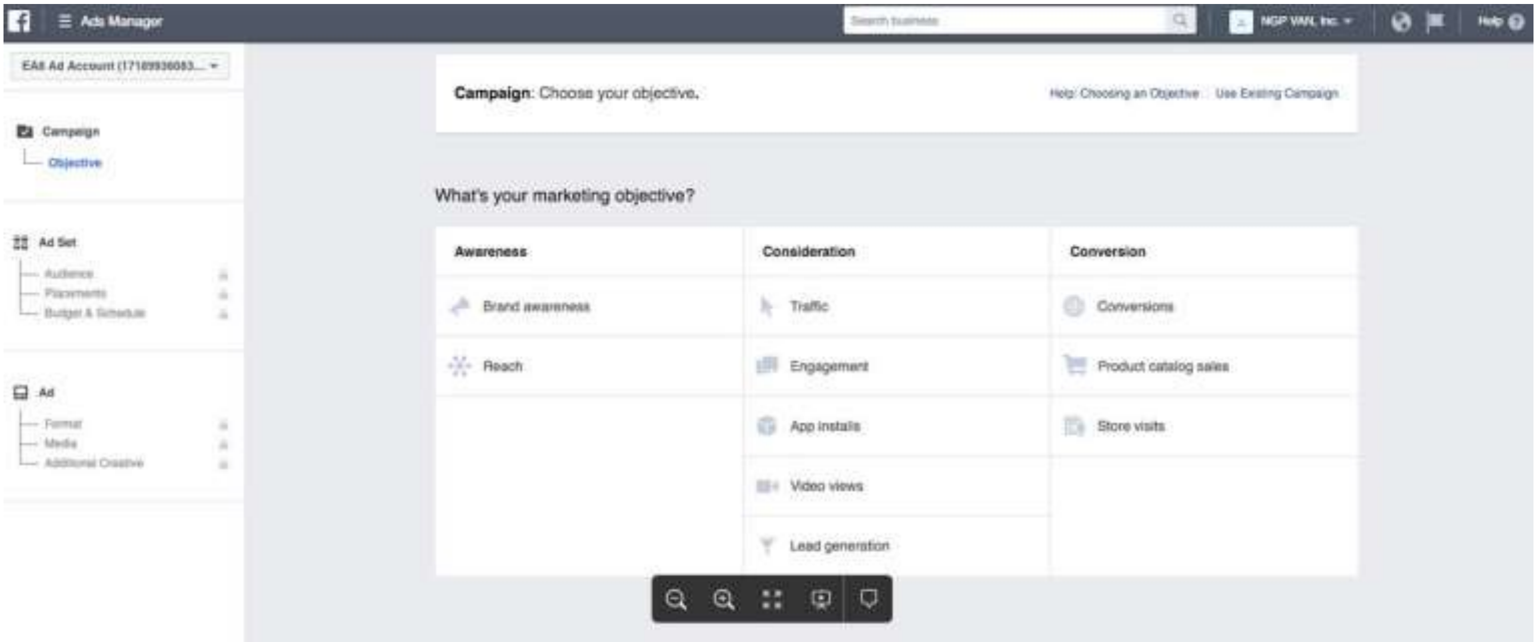
When the platform for the Digital Ads is Facebook, then users can push their list directly to a Facebook Ad Manager account. This can be done with the 'Push to Facebook' button at the bottom of the Review page. This leads users to a new page as shown below. Again, users have the choice to update Contact History or not.



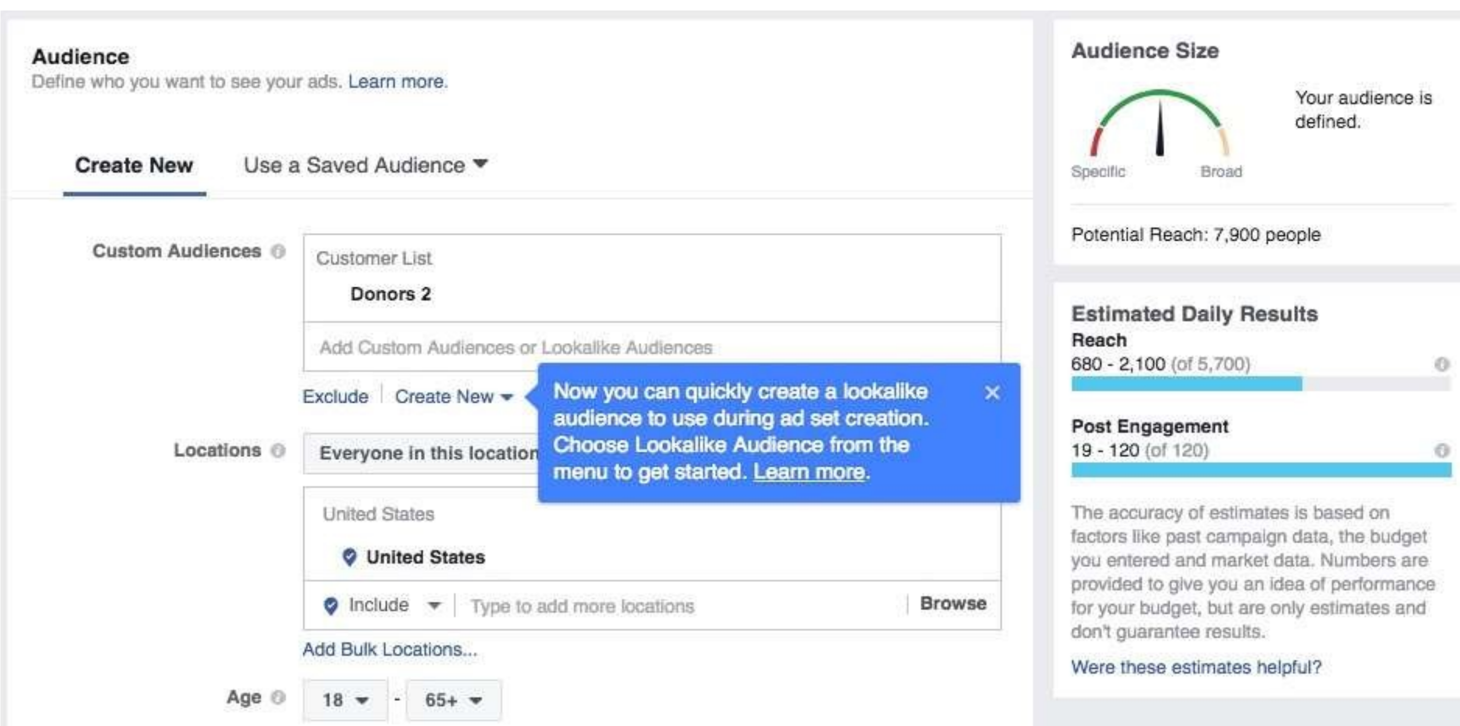
There are a few reminders for users here - they will need to have already created a Facebook Ads account and accepted the terms of service. If users haven't currently logged into Facebook, and/or have not connected their account to our Facebook app, they will need to do so by clicking on the Connect link. After successful authorization of their Facebook login credentials, users will be prompted to enter their Facebook Ad account ID number. Then they would click the 'Upload to Facebook' button which sends the list of contacts to their Facebook Ads account as a new custom audience. The plan status will change to

'Complete.'

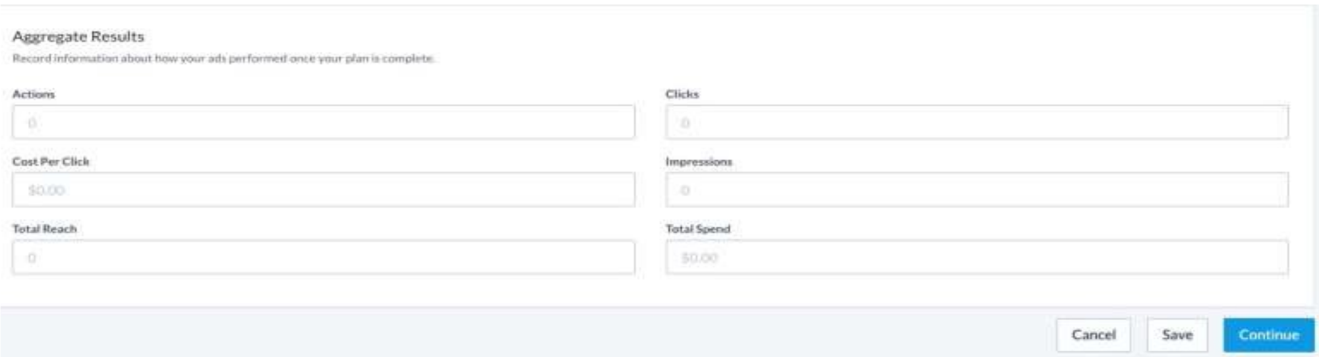
In Facebook's Ad Manager, users can start a new ad by clicking on the 'Create Ad' button. This leads them through several steps which are outlined on the left side - picking the objective (engagement, lead generation, etc.), who the audience will be (the uploaded custom audience and/or a lookalike audience based on that list of contacts), the budget,



and then the creative (photo, text) can be added.



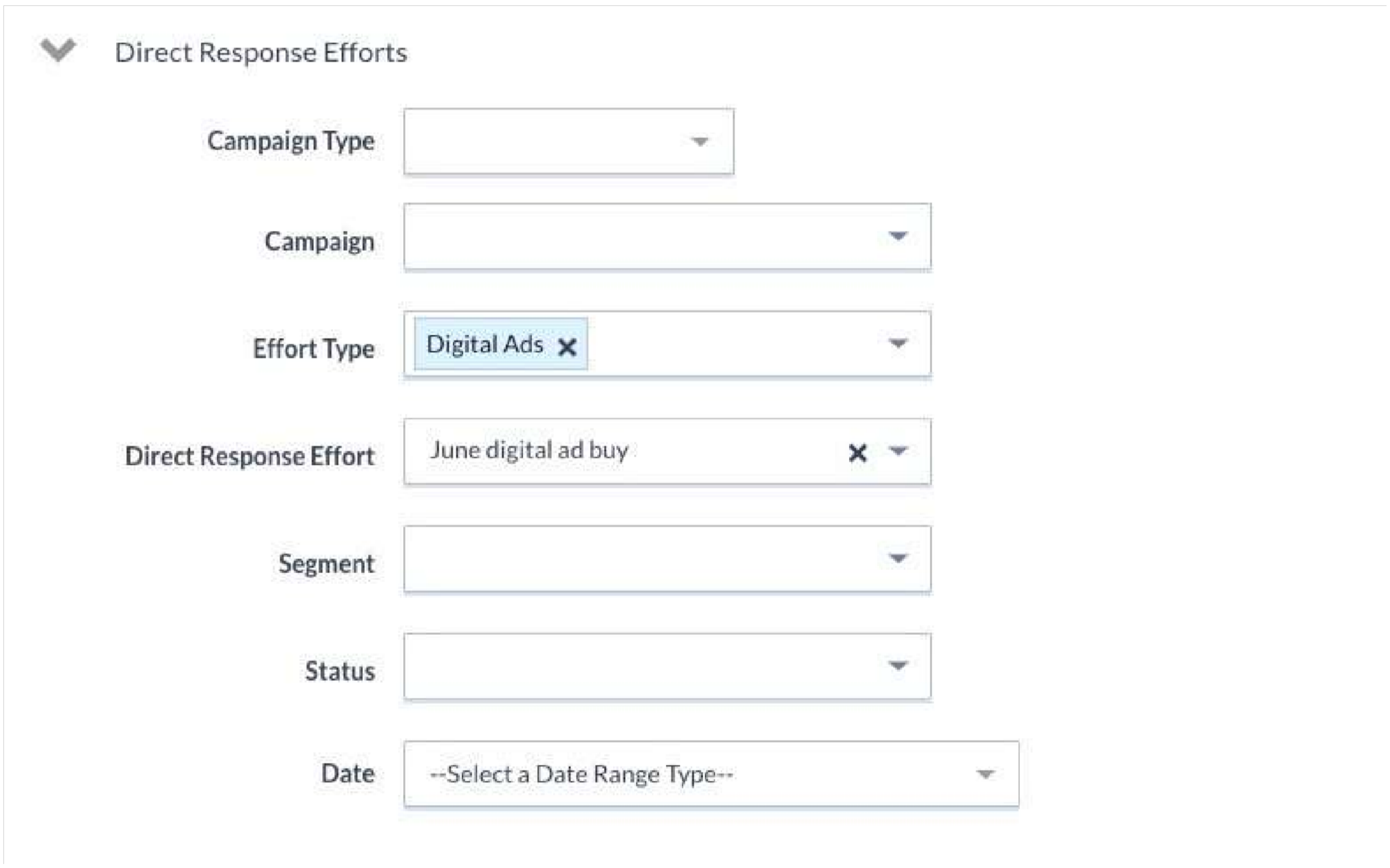
Once users have completed a plan through either of the above workflows, a new panel of fields will become visible in the Details step to record results for the effort which can be



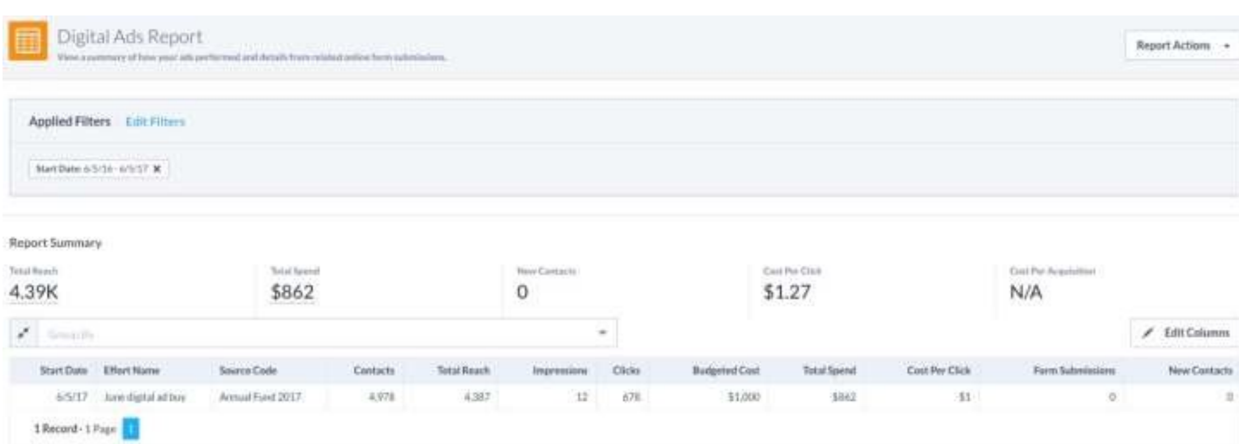
potentially be learned from the external platform (Facebook, Google, etc.).

In Facebook's Ad Manager, this information can be found under the Ads Manager. Below are examples from the Ad Sets and Campaign views:

Contacts from a Digital Ads plan can be selected in a Create a List search later in the Direct Response Efforts page section. This section has a variety of search options.



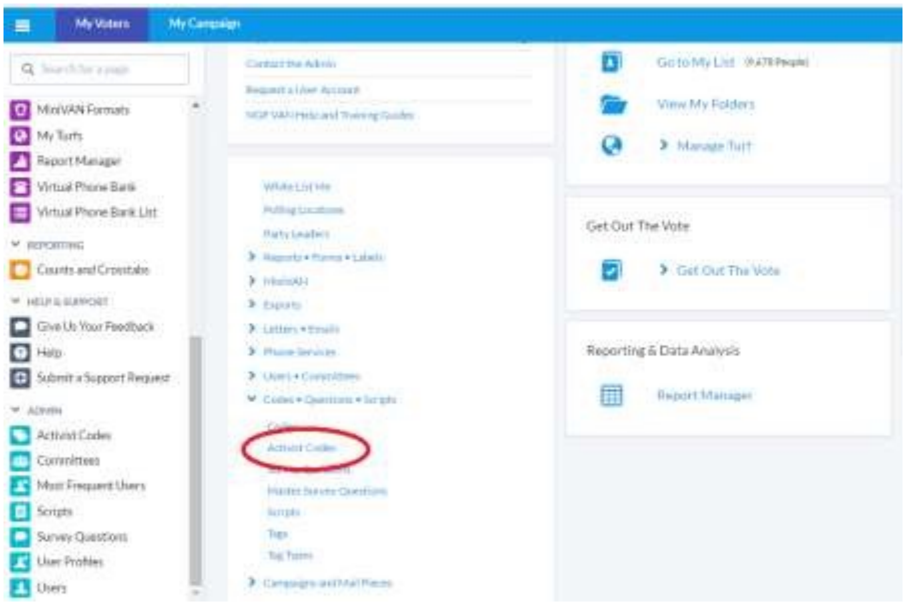
Results from a Digital Ads plan can be seen in the Digital Ads Report. The report defaults will show efforts from the past year. Additional filters are available to look at specific efforts, designations, or campaigns. Access to the **Digital Ads Report is controlled by the security function, 'View Digital Ads Report' and the ability to export it is controlled by 'Export from Digital Ads Report.'**



FL DEMS
Florida Democratic Party

Archive an Activist Code

To archive an activist code, go to **Activist Codes** on the homepage.



Find the activist code and select its **Long Name** to edit. Near the bottom of the Edit page, change the **Status** to **Archived**.

Then click **Save** to finish.

Candidate Support Survey Questions – Best Practices

Almost every campaign and committee will at some point ask voters which candidate they support in an upcoming election. If you plan on creating a candidate support question, keep in mind the following best practices.

Why? One of the amazing benefits of Votebuilder is the fact that the DNC can pool all of the data collected over an election cycle, and use it to generate scores and targets. By following these suggestions, you make it easier for the DNC and the FDP to put data into the right bucket for processing.

The Question Itself

When you are creating a survey question, you need to write out the question itself. Each question should include the following four data points:

1- Name of the candidate
2- Type of election
3- Location/District 4- Election cycle

E.g.: Do you plan on supporting *Joe Candidate* for *State Senate* *District 20*, in the *2018* election?

By including all of these features, anyone who looks at the question knows exactly who the candidate was, what they were running for, which district they ran in, and what cycle the question refers to.

The Responses

The way you set up your responses is equally important. Responses should fall on the following scale:

1) Strong support for Joe Candidate
2) Leaning support for Joe Candidate
3) Undecided
4) Leaning support for GOP Candidate
5) Strong support for GOP Candidate
6) Leaning support for Third Party Candidate
7) Strong support for Third Party Candidate
8) Not Voting

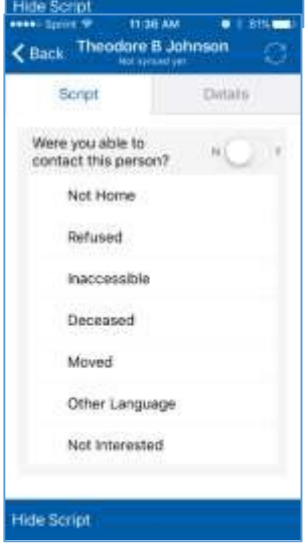
By following this scale, we can easily compare the responses to many different survey questions.

MiniVAN

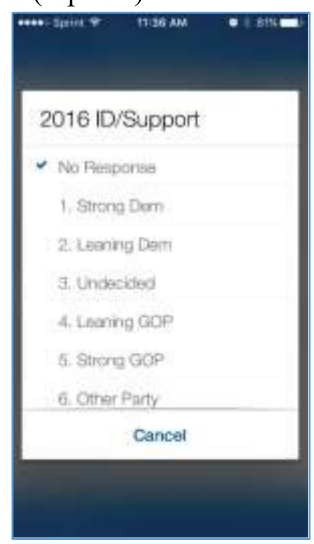
Getting Started

To use MiniVAN, go to the App store on your smart phone or mobile device and search for "MiniVAN Touch". Download and load the program. The first screen will prompt you to either log in with your ActionID or create a new one. After logging in it will ask which part of the VAN database to access; choose My Voters. Enter the List Number that has been provided to you by the canvass organizer.

Marking Attempts



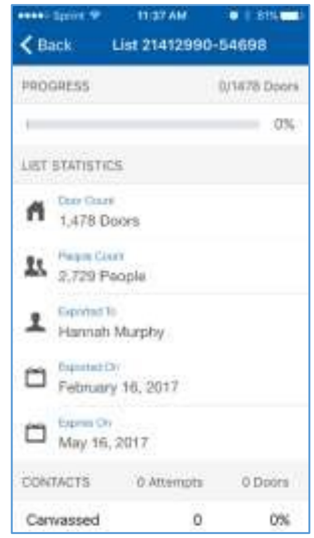
Once the list has been downloaded, the first thing to appear will be a list of addresses. Touch the menu icon (3 lines) at the top left corner of your device to examine options for viewing the list and more. View List by Map pinpoints the addresses on a map. View List by Household will pull up each address of targeted voters. Clicking on the address will open up the name of the voters, and clicking on the name will load the *Script* view with survey questions (top left). *Details* will show vital stats to help identify the person. If you spoke to the person and they answered as survey question, clicking the question under Script will load up possible responses to mark (top right). If you did not make contact with the person on our list, dragging the circle to the N (No) will load non-contact responses like Not Home, Moved, and Refused (bottom left). After marking them with a response, this individual's household will change color on the map to signify an attempt was made.



Syncing Data

Once the turf has been completed, view your list and hit the refresh icon (circular arrows in the top right corner) to sync all of the responses. Please only sync responses at the end of the canvass. After MiniVAN sends a notification saying the data has been synced, log out of MiniVAN to clear the list from the device.

Canvass Statistics



If you open the Menu and click on the List Number, there is the option to examine the list statistics and analyze the attempts at any point during the canvass (bottom right). You'll be able to check the count of doors/people in the turf and the success rate broken down by responses, and this is helpful to identify individual numbers for soft reporting.

Tips

Save your data! Turn cell data off for MiniVAN while canvassing. You only need to be connected to Wifi or cell data when you download your list, and sync the responses. MiniVAN will send you a notification when you disconnect and reconnect, and will save all the data in between!