

Vote Builder Basic Training

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Sarasota Democratic Committee
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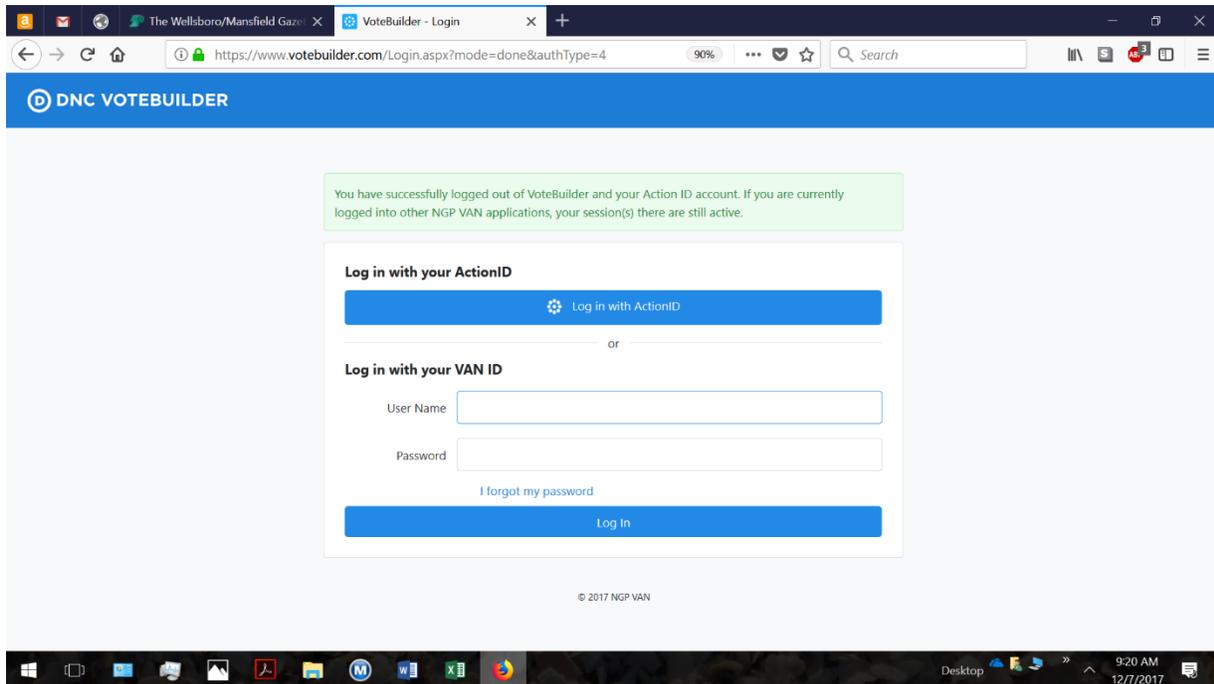
The Basic Training today will cover these areas:

- ❖ Login
- ❖ Quick Look Up
- ❖ Targeting
- ❖ Creating a Targeted Universe
- ❖ Saving your list
- ❖ Exporting Emails
- ❖ Creating Calling/Walking Lists Using Targeted Universes
- ❖ Using “My Campaign” to Find Volunteers
- ❖ Correcting Data
- ❖ Entering Data
 - Quick Mark
 - Script View
 - Grid View

LOGIN

Welcome to Votebuilder also called VAN, a powerful database brought to you by the Democratic National Committee and the Florida Democratic Party. Data comes from many sources but mainly from the Florida Department of State Division of Elections, purchased vendor lists and user input.

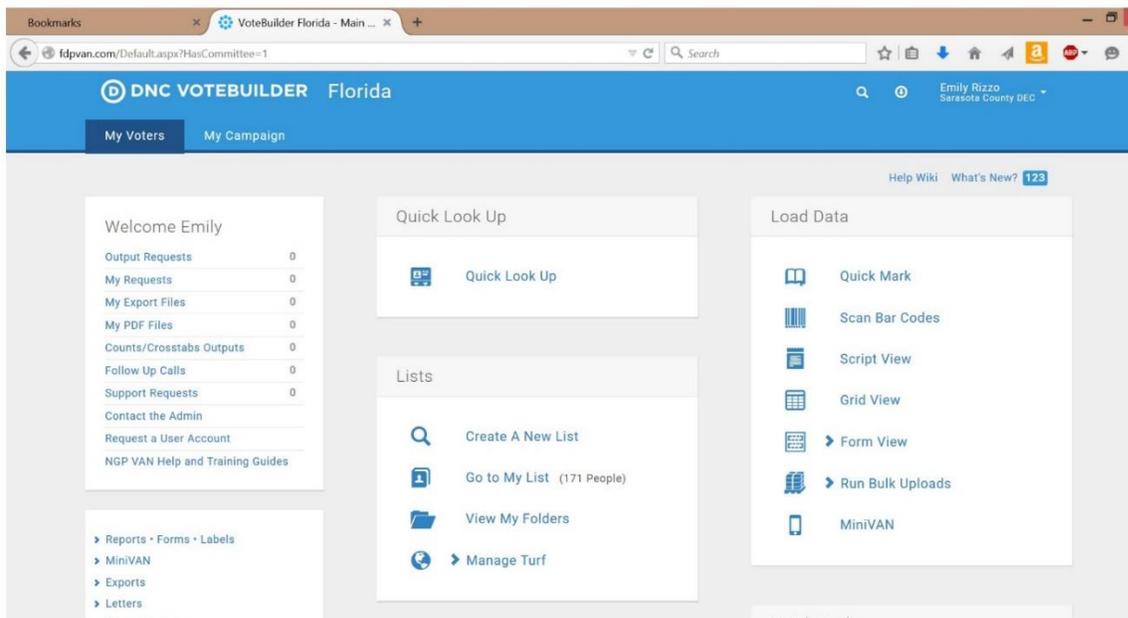
In your browser, go to www.fdpvan.com. Click on the top blue line to login with your ActionID then enter the data as requested. You may be asked for two factor authentication and/or a 4 letter PIN.



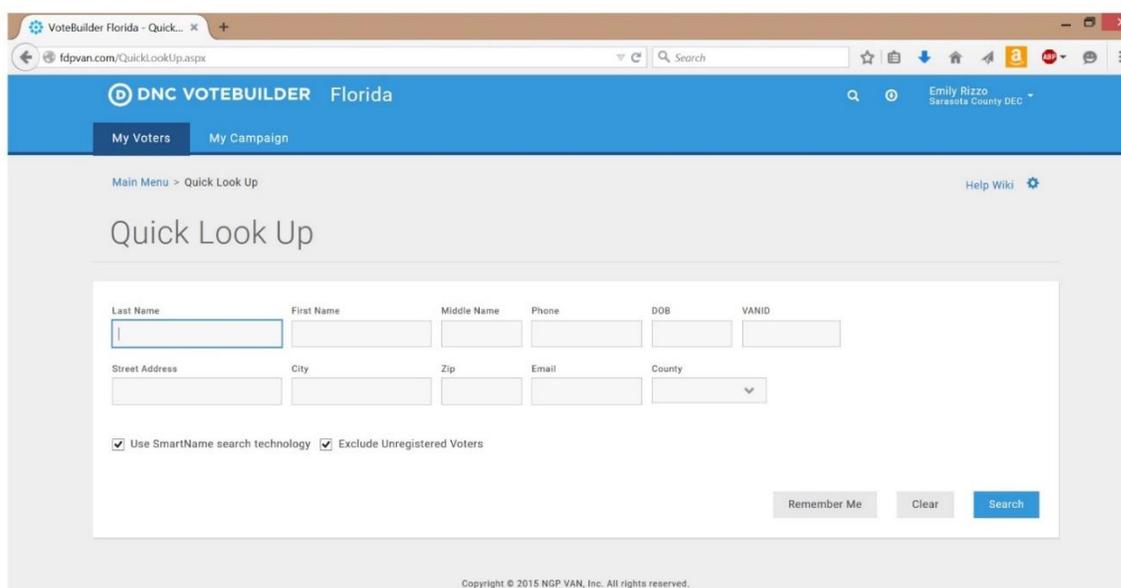
QUICK LOOK UP

There are two parts to Votebuilder: My Voters includes all registered voters; My Campaign includes only those voters with a special relationship to the Democratic Party, such as volunteers, donors, or event attendees. My Voters is in blue, My Campaign is in yellow. Remember, too, that any changes to data must be made in both sections.

Some general rules for Votebuilder: if it is in blue you can click on it, a red asterisk indicates that a field must be filled in, do not use the black back button on your browser but navigate within Votebuilder itself.

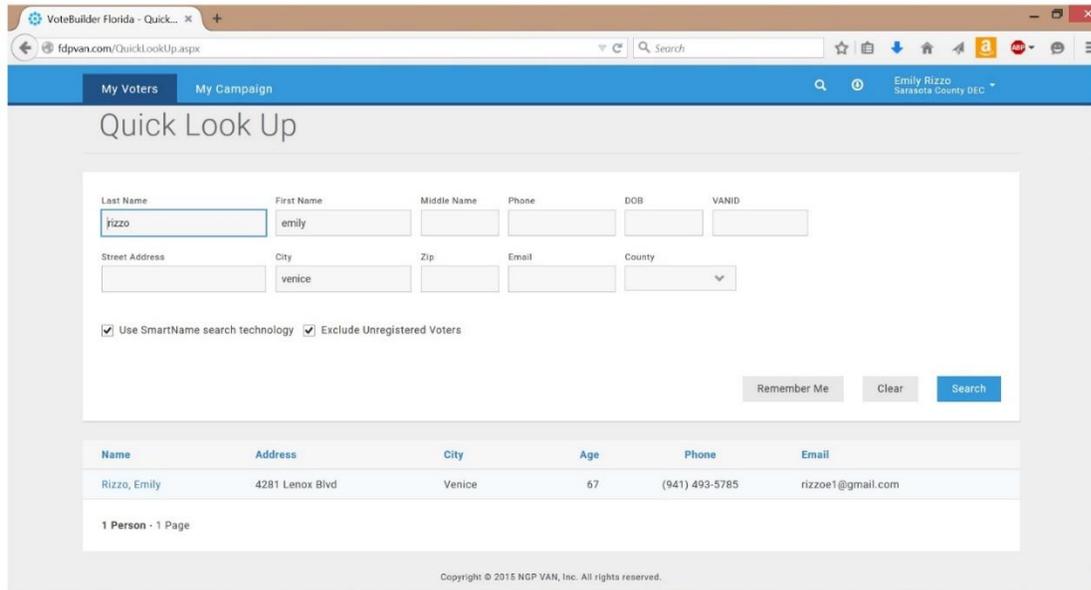


For now, let's remain in My Voters, so make sure it appears as dark blue at the upper left. Our first task will be to use look up to obtain information on a specific voter. Click on **"Quick Look Up"** at the top of the center column. Once you arrive at the Quick Look Up screen, input the search criteria. **Remember**, putting in very specific information will often not yield any results. *Search broader.*

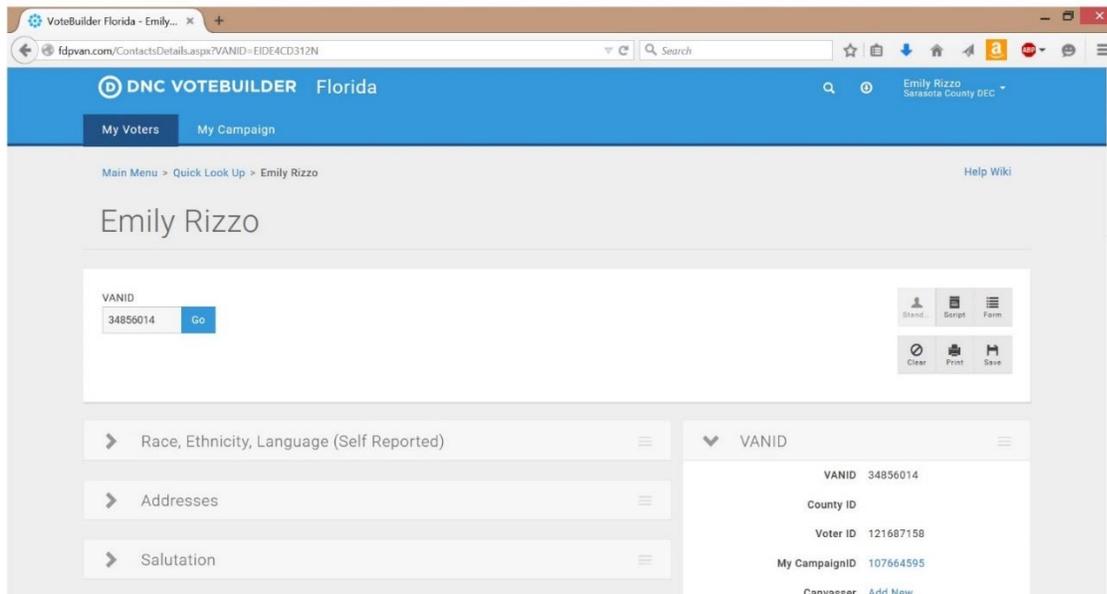


(“SmartName” Technology: that box is always default selected, this is done so that if you only know someone’s name is “Rob” but they may have registered as “Robert” or “Robbie”, “SmartName” will pull up all the iterations of that individuals name, it allows a broader search, which in turn helps to insure that you are able to find the individual whom you are looking for.)

Select the voter you’re looking for...



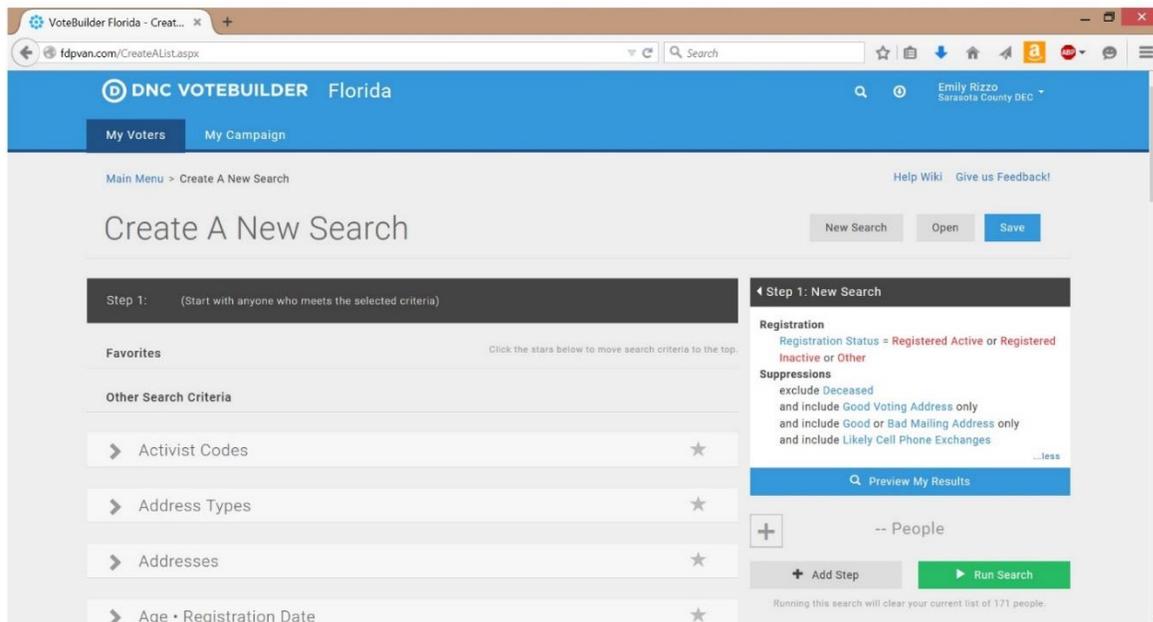
And you’ll be taken to the voter’s profile



CREATING A LIST

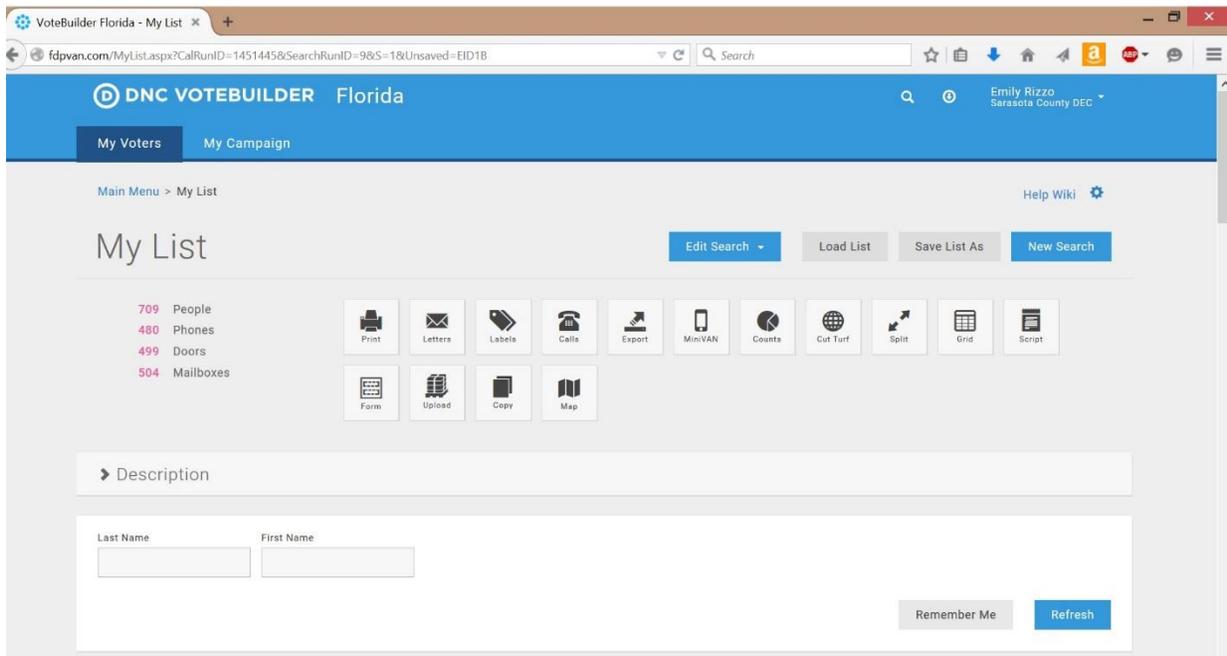
This will be where you can create the universe you would like to target. The Voter File gives a variety of “pickers” including Voting History that you can use to create lists of people who meet the specific criteria you have selected.

1. From the Main Menu – go to “**Create a New List.**”
2. From here you will see a variety of “pickers”, for this training we will be using a variety of these. To expand a specific “picker,” click the “>” symbol next to its name.



3. For “**Home Districts**”, click “**County**” and select **Sarasota**, a precinct drop-down menu will appear, select your precinct. If you wish to select only certain streets, click on the blue words “**Street Name.**” This will give you a list of all streets in your precinct followed by the number of registered voters of all parties. Click on the streets you want then click on the blue “**SAVE**” at the bottom right. You will be returned automatically to the “**Create a New Search**” page.
4. Next, go to “**Party**” and select the party you would like to search on (**Democrat** for training purposes).
5. Next go to “**Suppressions**” and click on “**Remove All Suppressions.**” This will pick up additional people who may have formatted their addresses incorrectly.
6. Then click “**Preview.**” This will give you the number of people who will appear on your list. It’s a good idea to run Preview as a double check before running very list.
7. Go to Voter Status and uncheck “registered inactive” and “other”
8. Then Click “**Run Search.**”

- Your page will refresh to the “My List” screen – on this screen you will see the amount of voters on your list, the amount of households (*Doors*) that those voters represent and how many unique mailing addresses we have for that group of voters. You will also have a sample of voters from your list. You are able to click on any voter on the screen to view their unique information.

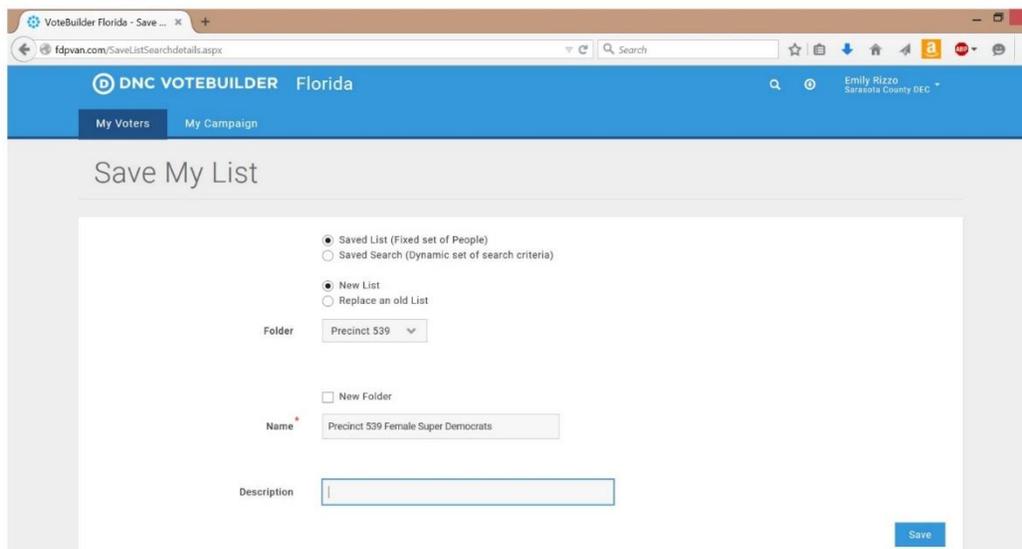


- We are going to “**Narrow**” it to refine our criteria. Select “**Edit Search**”, and a drop down box will appear. Click on “Narrow People” and your Edit Search page will refresh.
- Scroll down to “**Vote History**” and select the option you would like to use (**All** for training purposes)
- Next, select the elections you would like to search on (**2012, 2014,** and **2016 General** for training purposes), select “**Run Search**”
- You will be brought back to your list screen. Now we are going to “**Remove**” people from our list.
- Select “**Remove People,**” this will take you to your main criteria page.
- Under “**Activist Codes**” click on the blue words Activist Code and you will see a list of all the ones available. Click on “**DO NOT CALL**” and “**DO NOT EMAIL.**” Scroll down and at the bottom right click “**SAVE.**” Then once again “**Run Search.**”
- From here, you will be able to Save your list
- From here, you will also be able to create a Walk or Call List using the “Print” button at the far left.

SAVING YOUR LIST

Saving Your List

1. Once you have created your list, select “**Save List As**” at the top right of your list.
2. You will be given the choice of saving the list as a fixed set of people or a dynamic search. If you plan to rerun this search at a future time, then save as dynamic.
3. Your page will refresh and you be taken to a screen that gives you the option to either save as a “**New List**” or “**Replace an Old List.**” Select the option that fits your needs
4. You are then given the option to “**Create a New Folder**” by checking the check box, in which you would then repeat the steps above, or save into a folder that has already been created by selecting a list from the drop down menu.
5. Once you have selected the Folder option you will then title your list with a descriptive title.
6. Once you have done this you will be taken back to your list.

The screenshot shows a web browser window with the URL 'fdpvan.com/SaveListSearchdetails.aspx'. The page title is 'DNC VOTEBUILDER Florida'. The user is logged in as 'Emily Rizzo, Sarasota County DEC'. The main heading is 'Save My List'. There are two radio buttons for 'Saved List (Fixed set of People)' and 'Saved Search (Dynamic set of search criteria)'. Under 'Saved List', there are two radio buttons for 'New List' and 'Replace an old List'. A 'Folder' dropdown menu is set to 'Precinct 539'. There is a checkbox for 'New Folder' which is unchecked. The 'Name' field contains 'Precinct 539 Female Super Democrats'. The 'Description' field is empty. A blue 'Save' button is at the bottom right.

FOLDERS – Folders are used to store Saved Lists and Saved Searches. Folder contents can be shared between users on the same Committee and across Committees

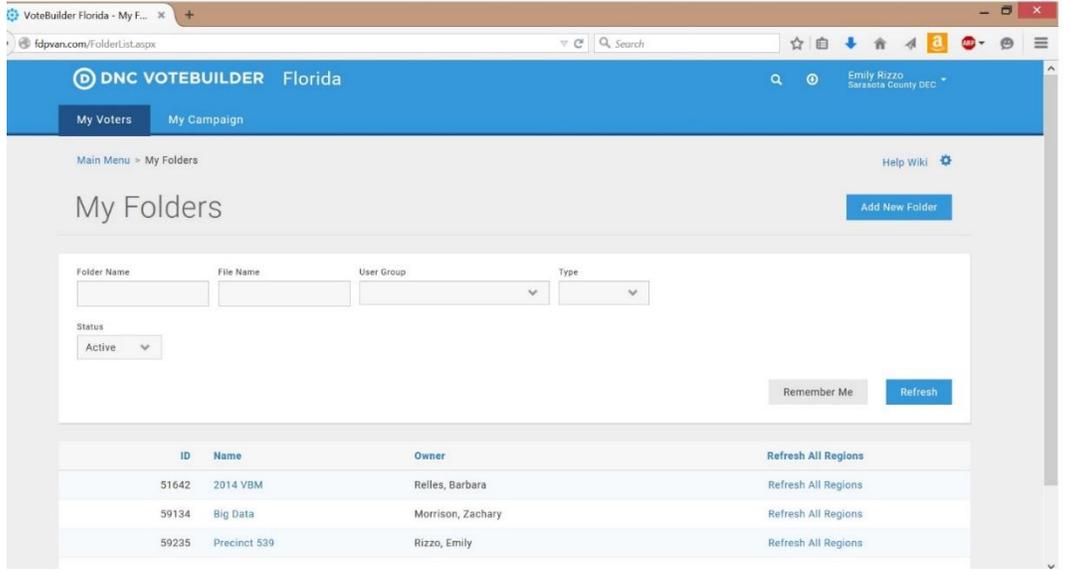
Accessing Folders

1. Users may access their folders from the Main Menu by clicking on the “**View My Folders**” button.

Creating Folders

1. From the “**My Folders**” page click “**Add a New Folder**” in the top right corner of the page
2. You will then be able to Name your folder and give it a description,
3. You will notice a check box to “**Allow Other Users To Save Into This Folder**” – Checking this box will give any user listed in the users with access box on this page the ability to put

their lists and searches into this folder – However, as the owner, you remain the only one who can grant access to the folder or edit it.



EXPORTING LISTS

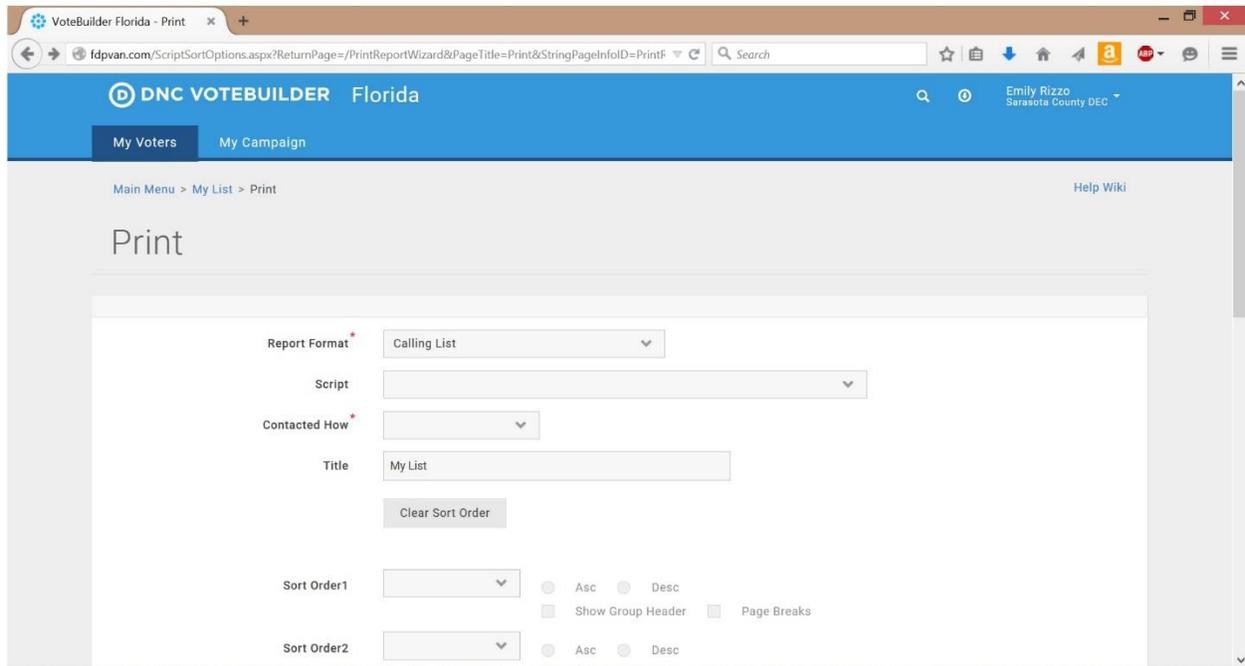
Some users are allowed to export lists into Excel. Call up your list then click on “**Export**” on the bar. All export lists must be approved by the Florida Democratic Party. Once approved, you will be given a choice of formats but by choosing “**standard text**” you will be able to choose the fields you want included. Note: Voter File VANID cannot be removed. Then click on the blue “**Export**” and proceed to the Main Menu which will show a red number 1 waiting in your Export Files. Click on “My Export Files” then download your file. Please note that will download as a Tab Delimited file so if you wish to save in Excel you must select a different format. All export requests from My Voters now need to be approved – you will be taken to a dialog box; exports from My Campaign do not need approval.

CREATING WALKING/CALLING LISTS USING TARGETED UNIVERSES

Please note that we now expect all calls to be made using Virtual Phone Banks and all canvassing to be done through Minivan.

1. Call up your List and select the “**Print**” button at the upper left. In the Voter File, a report means that you want to print a walking or a calling list.

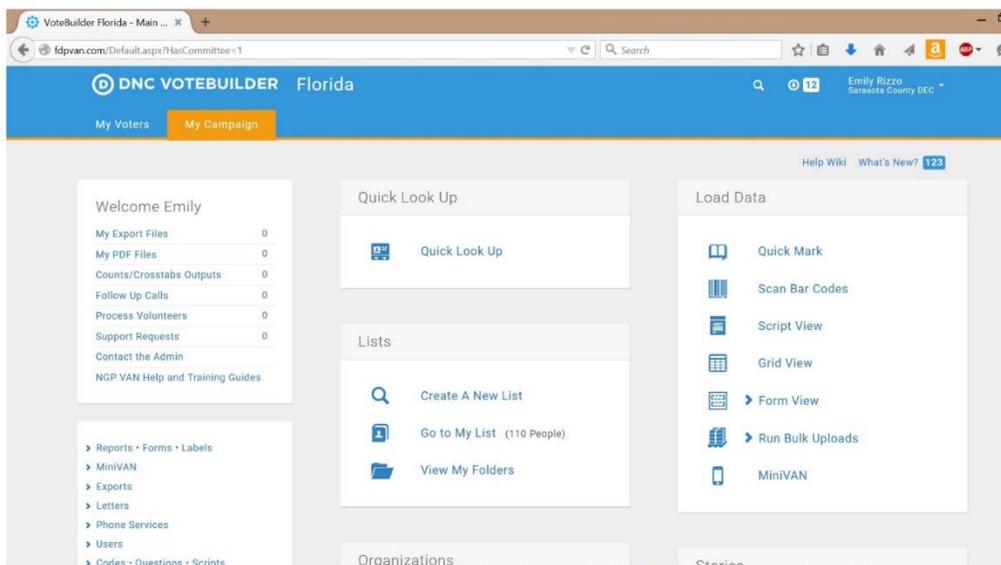
2. Your screen will refresh and give you a variety of options: The most important thing to remember is what your final goal is: If you are printing a “**calling list**” (as we are for training purposes), remember to choose the setting that says “**calling list-default**” (or “**walking list - default**” if you are preparing a canvassing list).
3. Select “**Calling List-default**” in Report format.



4. Select your counties' script for script, but a script is not required however.
5. Select “**Phone**” for source once you have selected the option, the sort order will be automatically filled in sorted by phone number.
6. For a canvassing list, select “**Walking List - Default**” then “**walk.**” The default will be sorted by street name odd and even. To save paper you can remove all page breaks when printing a list. This is done by unchecking the ‘Page Breaks’ box at the far right option list, next to the ‘Precinct’ drop down list. You can check “**Print Map**” which will show you locations. Once done, click “**next.**” You will see a notice telling you to return to the Main Menu to check for PDF files.
7. Canvassing lists can be sent to Minivan once a list number has been generated.

USING “MY CAMPAIGN” TO FIND VOLUNTEERS

Now let’s go to My Campaign which will include only those people, not all of them voters, who have a special relationship to the Democratic Party. Click on My Campaign which will appear in yellow.

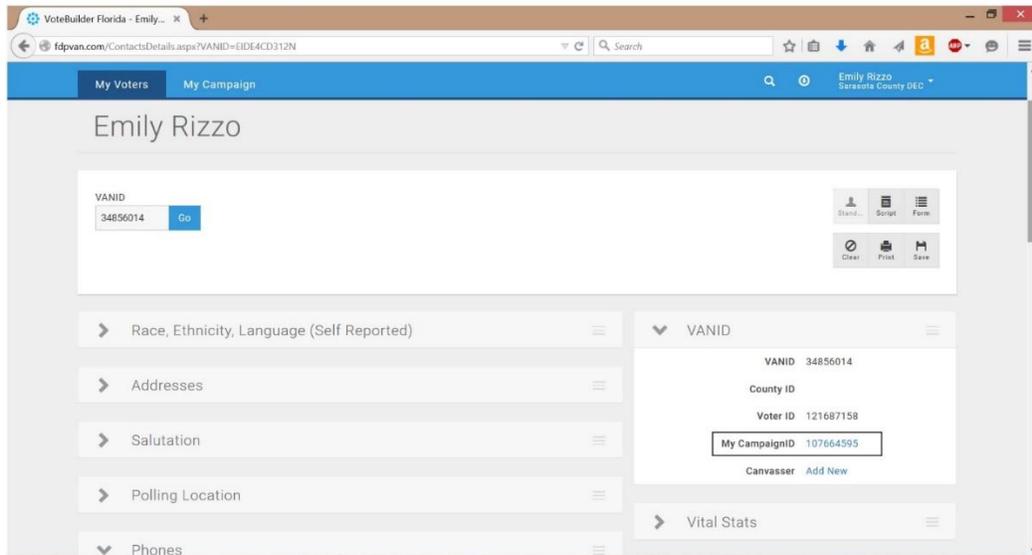


Everything looks the same but you will now have access to more data on individuals including more activist codes. Let’s create a list of potential volunteers. Again, select **“Create A New List.”** At Activist Codes click on the blue words **“activist code”** then select the middle blue option **“Check All Activists.”** This will give you a list of people who have either attended an event, made a donation, volunteered in the past or signed up to volunteer in the future. If you are looking for people for a specific job, such as a poll greeter, you can select the code 1710 that meets your needs. Just keep in mind that not everyone in My Campaign is a registered Democrat, so you may wish to narrow your list at Party to Democrats only.

CORRECTING DATA

As you use Votebuilder you will find data that needs to be corrected; people are always changing their phone numbers and e-mail addresses which means deleting old data and entering the new. It is IMPORTANT to remember that changing data in My Voters does not automatically update the information in My Campaign, and vice versa. Any changes must be made to both sections but when you are in an individual’s record you will see a number on the right hand side **“My Campaign ID.”** Clicking on this will take you to the person’s My Campaign record. If someone is not in My Campaign but you think they belong there, then you have the option to **“Add to My Campaign.”**

We now have new Activist Codes in My Voter under 1700 to indicate is someone has moved, died or is a snowbird. If you know someone has died, you can also delete their address (click on the three dots to the right).

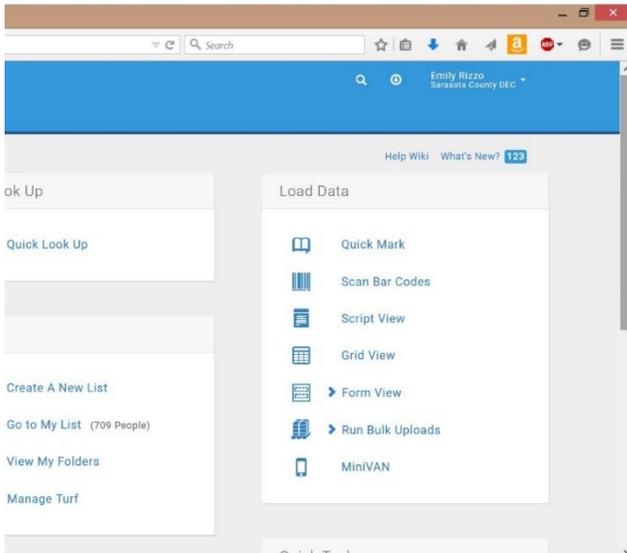


ENTERING DATA

Please note: that all data collected in Minivan or a Virtual Phone bank is automatically updated in VAN so this is a legacy section.

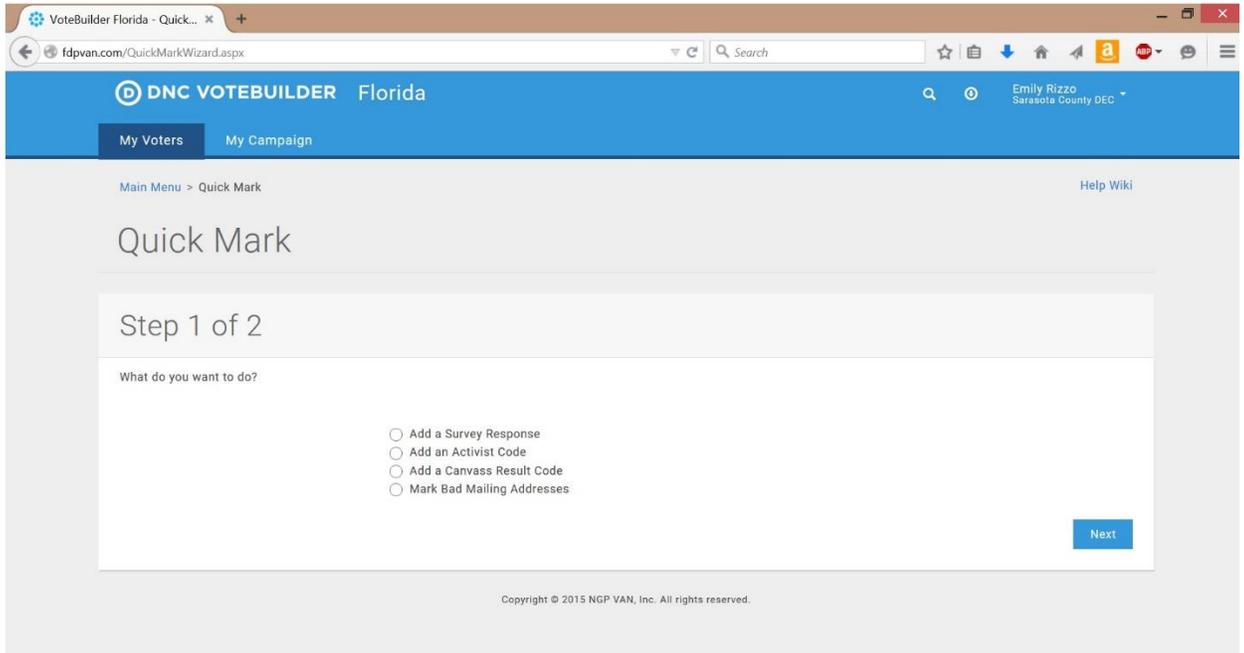
Entering data gathered from phone banking or canvassing on foot **SHOULD OCCUR THE DAY THAT IT IS GATHERED.** If the data sits around un-entered for a week, it is quite useless in a rapidly changing campaign environment. On the right side of the main menu is a

column showing different ways to load data.



QUICK MARK

In Quick Mark you can quickly add “**Survey Responses**”, “**Activist Codes**” and “**Canvass Results**” and **Mark Bad Mailing Address**” for individual voters – It is similar to the quick look up feature, but with the additional ability to add information.



ADDING A SURVEY RESPONSE

1. Select “**Quick Mark**” – the select “**Survey Response**”

- Using the drop down menu, select which “**Survey Question**” you want to apply, if you have the canvasser, date and how the information was collected, enter that information using the drop down box as well – Hit “**Finish**”

The screenshot shows a web browser window with the URL `fdpvan.com/QuickMarkWizard.aspx`. The page title is "Quick Mark" and it is labeled "Step 2 of 2". The instruction is "Select the data you wish to apply". The form contains the following fields:

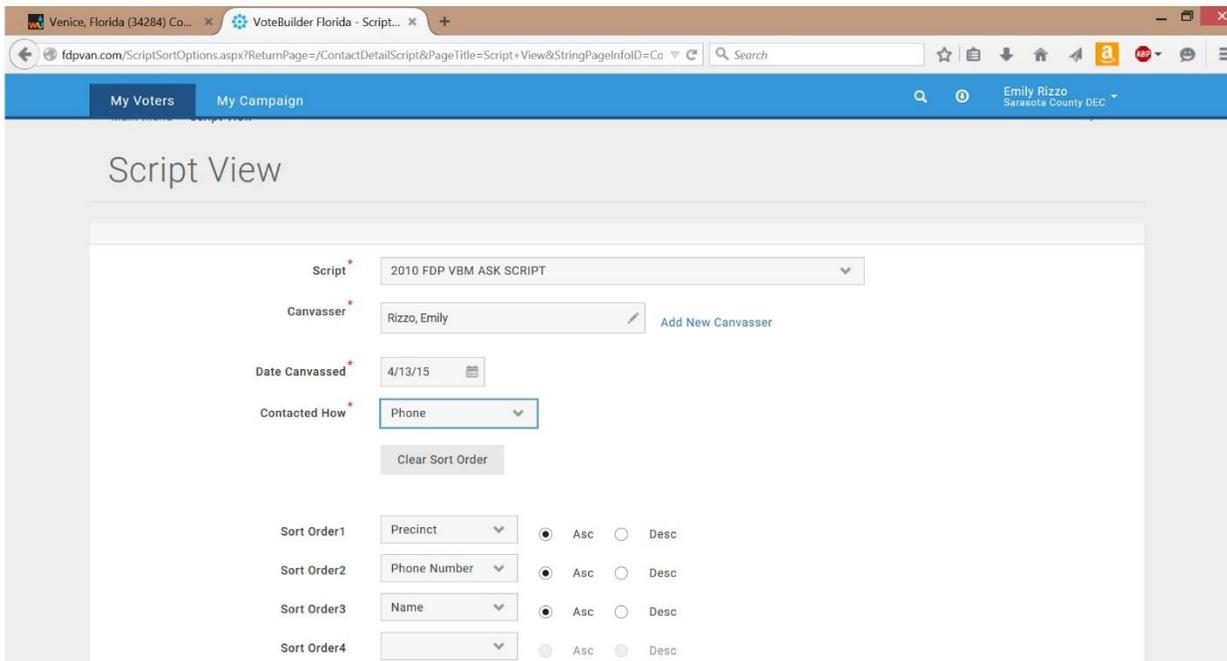
- Survey Question**: A dropdown menu with the selected value "2015 Candidate: D2 Voting (Public)".
- When**: A date field with the value "4/12/15".
- Canvasser**: A text field with the value "Rizzo, Emily" and a small "Add New Canvasser" button to its right.
- How**: A dropdown menu with the selected value "Phone".
- Campaign**: An empty dropdown menu.

At the bottom right of the form, there are two buttons: "Previous" (disabled) and "Finish" (active).

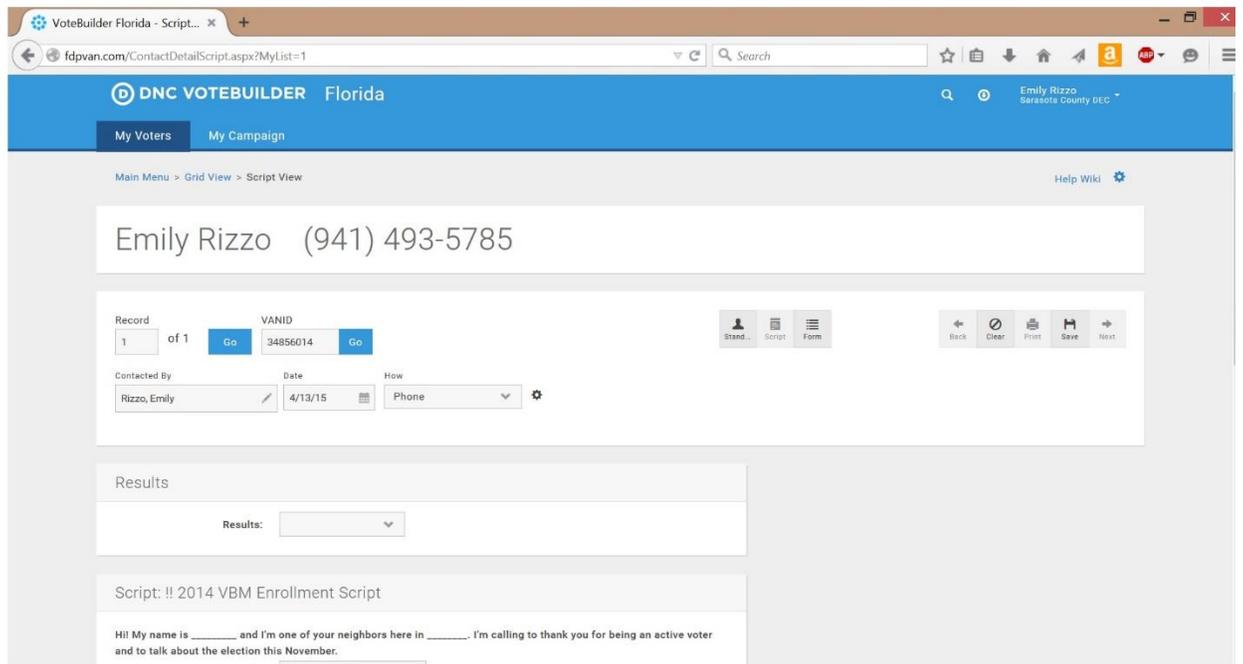
- You will then be guided to a page that looks similar to “Quick Look Up” – Type in the person’s name.
- Once you have found the person that you want to tag, click the box next to them and click “**Save/Search**”. The person will now have the “Survey Response” that you selected added to their record.

SCRIPT VIEW

- Select “**Script View**” from the Main Menu
- Next, fill in the Script that was used in the Walk or Call, then fill in Canvasser, Dates and Source. If this is data collected from a Walk, select Walking, if this is data collected from a Call, select Calling.

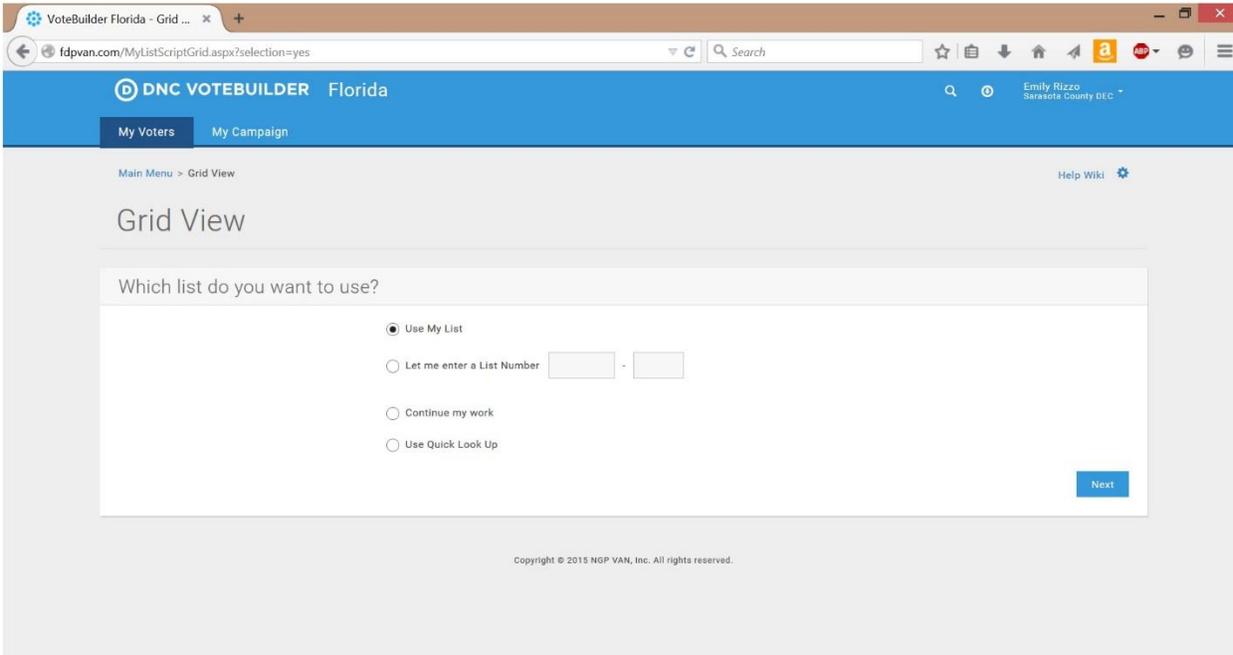


3. Once you have selected Source, the sort order will be filled in, similar to when you created your walking or calling list – select **“Next”**
4. You should see the first person on your list – from here fill in the answers as they were marked on your walking or calling sheet, and click **“Save Changes”**. The person’s answers will be automatically updated to their profile.
5. Once you do this, the next person on your list will appear.



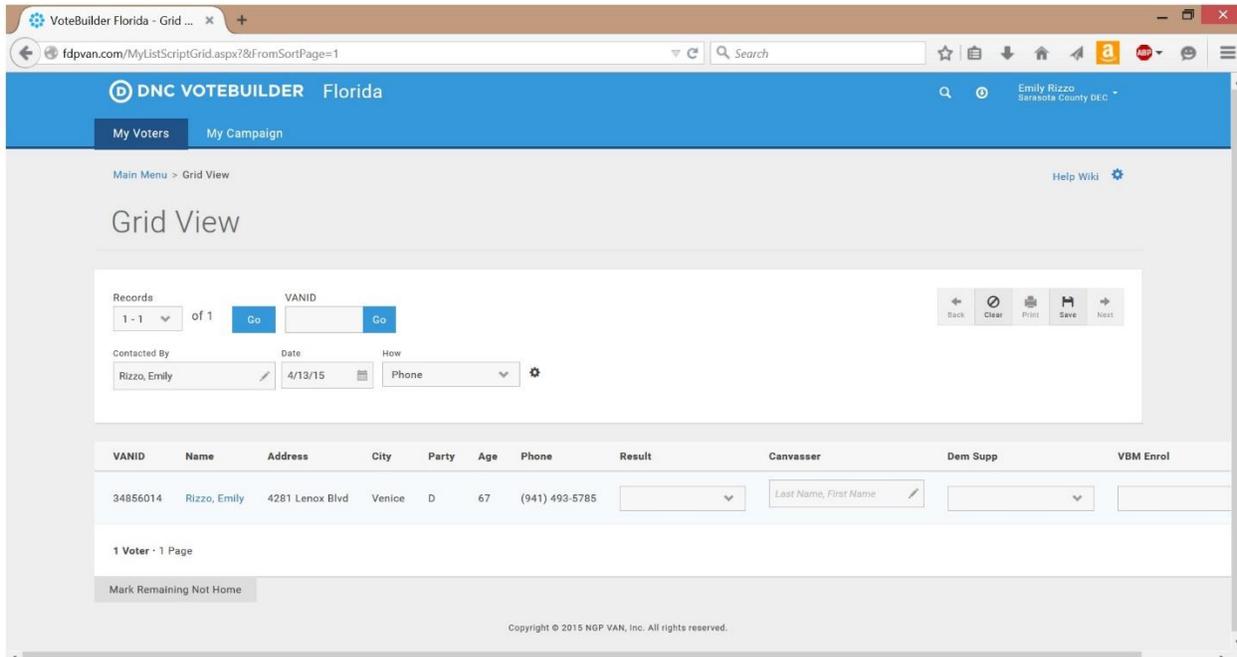
GRID VIEW

The easiest way to enter grid view data is to use the number at the bottom of each list, this number will work for 30 days after printing the list, however, the same axiom applies, data gathered must be entered in **THE DAY IT WAS COLLECTED** – alternatively you can use the list that you currently have pulled up.



The screenshot shows a web browser window with the URL `fdpvan.com/MyListScriptGrid.aspx?selection=yes`. The page title is "DNC VOTEBUILDER Florida". The navigation bar includes "My Voters" and "My Campaign". The main content area is titled "Grid View" and contains a form with the heading "Which list do you want to use?". The form has four radio button options: "Use My List" (selected), "Let me enter a List Number" (with two input fields), "Continue my work", and "Use Quick Look Up". A blue "Next" button is located at the bottom right of the form. The footer of the page reads "Copyright © 2015 NGP VAN, Inc. All rights reserved."

1. Select Grid View from the Main Menu.
2. Select either **“Use My List”**, **“Let me Enter a List Number”**
3. Fill in the Script that was used, canvasser, date and source. If this is data collected from a walk, select Walking, if this is data collected from a Call, select Calling.
4. Once you have selected Source, the sort order will be filled in similar to when you created your walking or calling list – select **“Next”**
5. You will then see a grid very similar to the **“Walking”** or **“Calling”** list that you had printed out earlier, it will be in the same order as your list and from here you will be able to transfer data quickly from your list into the system.



This is just a brief taste of what Votebuilder can do for you and your campaign. Spend some time to explore and don't forget the **"Help Wiki"** button which always appears at the upper right.