VANual

The Delaware Democratic Party's guide for using the VAN, or Voter Activation Network, commonly referred to as VoteBuilder.

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Includes elements from the 2012 Delaware VANual written by Katie Ellis, with revisions by Matt Pazoles and Raymond Lewis. Copy edited by Alanna Mozeik.

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Basic FAQ

What is Votebuilder?

Votebuilder is the common name for the Voter Activation Network (VAN). It is a collaborative project between the Democratic National Committee, the Delaware Democratic Party, local party units, and Democratic campaigns in Delaware. In recent years, Votebuilder has become the backbone of nearly every major Democratic campaign. In simple terms, it's an online database management program that allows us to easily utilize the state voter records to mobilize Democratic voters and volunteers.

Throughout this guide Votebuilder will also be referred to as "the voterfile" and "VAN."

How do I gain access to Votebuilder?

Any Democratic Campaign Committee that meets the eligibility requirements may purchase Votebuilder from the State Party. The cost of Votebuilder will vary depending on the level of office (Statewide, County/Citywide, State Senate/County Council, State House/City Council). To receive a Voterfile Request Form, please contact State Party staff.

Representative District Committees are provided with Votebuilder access to assist with their party building duties. RD access is intended supplement individual campaign access, not supplant it.

What do I need to use Votebuilder?

You will need a computer with internet access. Votebuilder is a web application, your account and any work that you do is stored online rather than on your personal computer. This means that, as long as you have internet access, you will be able to access your work from any computer. Votebuilder should work without issue with Internet Explorer, Firefox, Chrome, Safari, and most other web browsers regardless of the operating system.

While not absolutely necessary, it is highly recommended to have access to a decent-quality printer for printing walk lists.
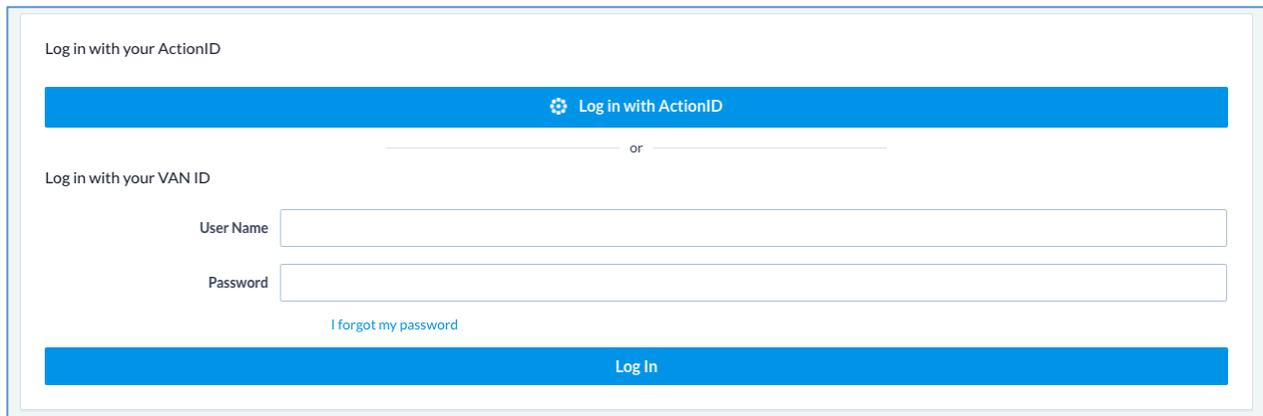
If you plan on using MiniVAN, you will also need a smartphone and the MiniVAN app.

Getting Started

Votebuilder can be accessed by visiting:

www.votebuilder.com

From there you will be able to sign in using you user name and password.

When your user profile was first created you should have received an email prompting you to login and setup your account. The first time you login, you will be asked to create a password and fill out contact information. You must follow these steps in order to use Votebuilder. Use that user name or ActionID and password to login on this page.

Once you have logged in you will be taken to Votebuilder's Main Menu.
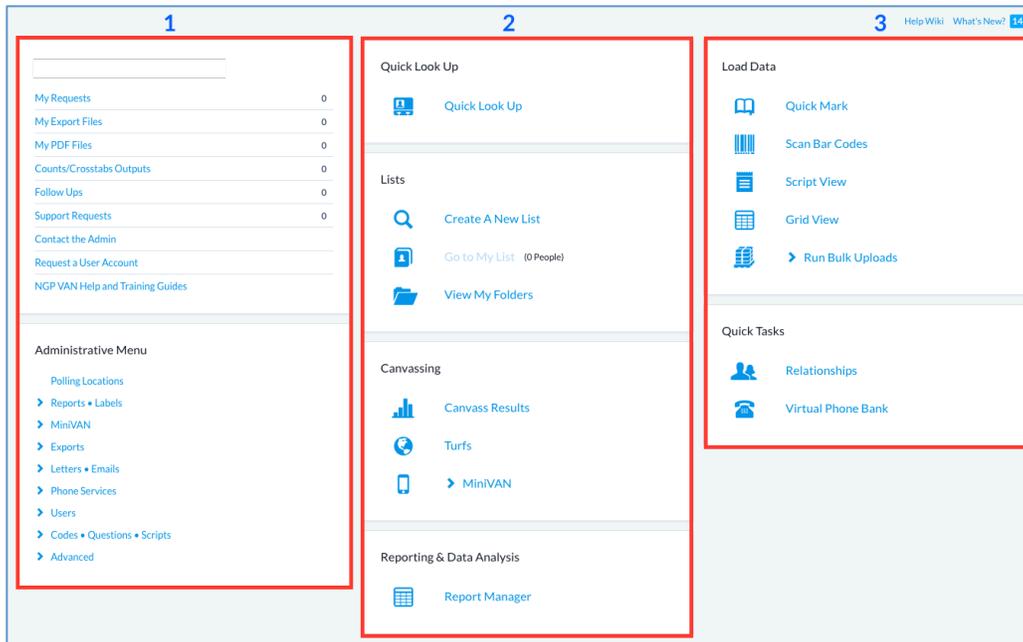
Main Menu

My Voters v. My Campaign

At the top of the Main Menu (and every page in Votebuilder) you will find two tabs that will denote exactly which database you're working in.

- **My Voters** (blue) contains every voter in the state. This side of Votebuilder is based on the VoterFile that is maintained by the Delaware Department of Elections and is updated monthly. It's used to target voters and track communication with them. The base information in this side of Votebuilder is the same for every campaign, but data attributed to each voter (Survey Responses, Activist Codes, etc.) is unique to the campaign.

- **My Campaign** (yellow) is a database of volunteers and activists that is built and maintained by each committee. While it draws upon the state voterfile for some information (you can match your entries to the voterfile for greater accuracy), it is comprised of anyone the campaign enters into it – even if they are not eligible Delaware Voters. It is often used to produce lists of activists and track volunteer activities. No other users will be able to see any of your data unless you explicitly share it with them. It's important not to use My Campaign for voter contact information, as it does not evolve with the voterfile updates.

Whichever side of Votebuilder that you are working in will be highlighted at the top of the page. If you're having trouble finding people, double check to make sure you're in the correct tab.

To put it simply:
- Use My Voters to manage voters
- Use My Campaign to manage volunteers and others involved with the campaign

Overview

It helps to think of the Main Menu as being made up of three panels/columns, each focused on helping with a generally defined task.

1. **Administrative**
   - Where you will find files that you have requested for export, turfs you've submitted for printing, as well as Scripts and Survey Questions.
   - Notable Features
     - Request a user account – Bring more people on board
     - Contact the Admin – In case you have a question or problem
     - MiniVAN – Manage formats for the MiniVAN app
     - Codes | Questions | Scripts – View survey questions scripts and codes
2. **Data Retrieval/Searching**
   - Where you will be able to go into the Votebuilder and retrieve information.
   - Notable Features
     - Quick Look Up – Search for an individual person
     - Create a New List – Search multiple people
   - Turfs – View/search previously cut turfs
3. **Data Input**
   - Where you will enter new data into Votebuilder
   - Notable Features
     - Quick Mark – Tag individuals through search function
     - Script View - Tag individuals following the script for that list
     - Grid View – Tag individuals using grid format, similar to walk lists

The features that appear under each of the different panels depend on the user profile assigned to your username/committee. Not all features are available on all accounts.

Support Features

- **What's New?** (Top right-hand corner of Main Menu)
    - o Highlights and explains new features as they're added.
    - o A numbered notification will appear when there is something new has been added.
- **Help Wiki**
    - o Directory that answers Frequently Asked Questions (FAQ) and is edited by users across the country (think of it as Wikipedia for Votebuilder).
    - o A link to the Help Wiki can be found at the top of nearly every page in Votebuilder, and, depending on which page you're on, the link should take you to the relevant wiki page.
    - o If you have questions it is best to check the Help Wiki first, chances are your answer is there.
- **Contact the Admin**
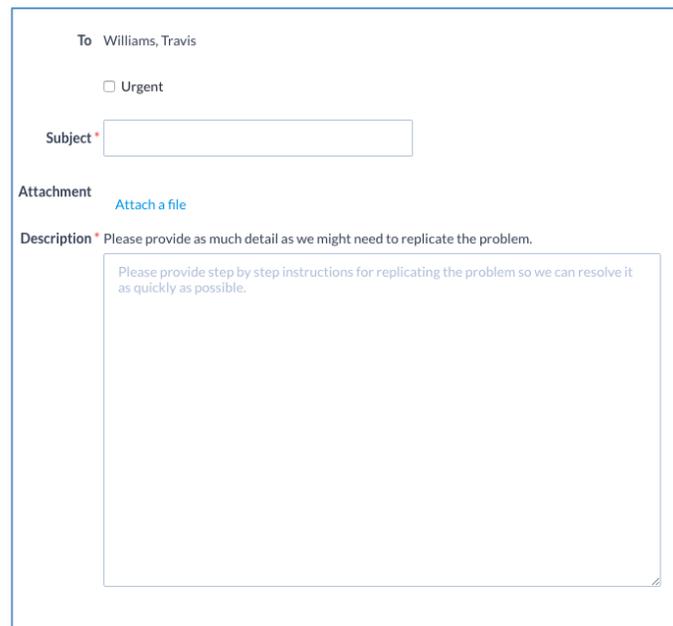
To	Williams, Travis
	☐ Urgent
Subject *	
Attachment	Attach a file
Description *	Please provide as much detail as we might need to replicate the problem.
	Please provide step by step instructions for replicating the problem so we can resolve it as quickly as possible.

- o If the Wiki doesn't answer your question, you can always "Contact the Admin" (found in the leftmost column on the Main Menu) to ask your question.
    - ▪ This will create a help ticket that will go to party staff
    - ▪ Save the "*Urgent*" marker for emergencies

- **Always feel free to contact party staff directly via phone or email!**

Quick Look Up

Quick Look Up
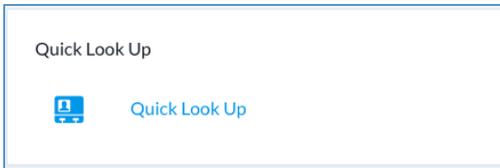
 Quick Look Up

Quick Look Up is the primary method for searching individual people in Votebuilder. Quick Look Up is not meant for broad searches; use "Create A New List" for that. This is a tool used for identifying specific voters/volunteers.

- Quick Look Up uses "Smart Name" technology that can generally extract Michael from Mike, Erik from Eric, and Robert from Bob.
  - The technology isn't perfect. The search function sometimes has problems with:
    - Hyphenated Last Names – The first of the two names and the full-hyphenated name will yield results. The second name alone will not.
    - Middle Names – Typing out a person's full middle name will throw off the search function since profiles only have middle initials.
- Generally the more information you enter into the search fields the narrower your results will be.
  - If you have a general idea of who you are looking for, entering less information may be the most efficient way to find the person.
- **VANID** and **Voter File VANID** are generated within the voterfile and unique to each voter. Either can be useful if you already know the ID of the person you're looking for, but typically are not the best ways to do a quick look up.
- Even though you will only be able to create lists of voters within the district(s) you have access to, you are able to look up any voter in the state using this tool (so you can determine whether they are in your district or look up their polling place).

Please Note: You can use the "Tools" option (the gear at the upper right) to choose which columns to display in the Quick Look Up results field.

After you have entered your criteria and initiated the search, you screen should look something like this:

Name	Address	City	Party	Age	Phone	Email	Precinct
Raser-Schramm, Erik J	1924 Harvey Straughn Rd	Townsend	D	40	(302) 437-4487	erikjschramm@gmail.com	1103
Rash, Fred J	21 Herbert Dr	New Castle	R	73	(302) 328-0509		1705
Rash, Frederick E	231 East St	Marydel	D	64	(302) 526-9154		1109

3 People · 1 Page

Note the search criteria (incomplete last name and misspelled first name)

Once you have found the voter you are looking for, click on his or her name to view their profile page. The profile should look similar to the image below:

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Voter/Individual Profile

Each individual in Votebuilder will have a profile attached to it. These profiles can tell you a number of different things about a voter/volunteer. Profiles are broken up into **Profile Sections, which are** made up of public information and information garnered through campaigns.

- Profile sections can be collapsed and expanded by clicking the chevron beside their title.
- Clicking and dragging the 3 bars on the far right side of the Profile Section can rearrange profile sections.
  - By clicking "Save Page Layout" you can save the configuration and expansion of the profile sections. Once this is done, each time you open an individual's profile the layout of the page will be the same as the layout you saved.

Profile Sections

Addresses		Voter File VANID
Email		Vital Stats & Contact Preferences
Phones		Districts
Activist Codes		Also in Household
Salutation		Likely Party
Self-Reported Demographics		Actions
Polling Location		Program Type
Survey Responses		
Contact History		
Blast Emails		
Early Voting		
Voting History		
Notes		
Targets		
Relationships		
Scores		
Follow Ups		
Applicant Status		
Robocalls		
Codes		

Addresses – This field tells you where a voter is registered to vote and any additional addresses that may be logged in the system.

Email - If you obtain a voter's email address, you can enter it here. Note that E-mail addresses are private to the committee that enters them. If you put in the email addresses of your supporters, no one else using the VAN will have access to them.

Phones - Any phone numbers we have on file for the voter. Usually, the Department of Elections supplies home phone numbers, which voters provide at the time of registration. You can manually enter cell phone, work phone, or fax numbers. Cell phone data will sometimes be added by the DNC and shared with committees. You have the option to choose a "preferred" phone number when more than one number exists on a voter's record.

Activist Codes - Activist Codes are a way of attaching additional data to a voter's record. Candidates will have access to some standard codes such as Volunteers and Yard Sign Request.

Salutation - This is how a voter would be addressed in a letter, call sheet, or walk sheet. If you know that the voter goes by a nickname, you can use this field to indicate that nickname.

Self-Reported Demographics – Demographic information such as Race, Ethnicity, and Preferred Language are displayed here. This data is not provided by the Dept. of Elections or the State

Party and will have to be entered by the campaign.

Polling Location – Tells you where the individual goes to cast their vote. Clicking "Get Map" will open a Google Maps page where you can get directions.

Survey Responses - When your campaign begins identifying voters to determine whether or not they are supportive, the results of those surveys will come up in this section. If your campaign is asking several questions, you will see all of the results here. Likewise, if you ask the same voter the same question several times (maybe you want to gauge their support in April, and confirm it in November), each entry will show up as a separate instance of the question.

Contact History - Any time the voter has been contacted by the campaign (and the campaign enters the data), the contact will show up in the voter file. The more data we can see on the file, the more complete picture we will have of the contacts each campaign has had.

Blast Emails – Displays blast emails that voter has received.

Early Voting - Early Voting is used to identify voters who have turned in their ballots for the current election. Data is entered as it becomes available from the DoE and tags each voter with the date their ballot was received.

Voting History - Here, you can see a record of which elections a voter has participated in. A "Y" indicates that, yes, the voter participated in that election;

"A" is absentee. There are separate fields for General Elections, State and Presidential Primary Elections, and Special Elections.

Notes - The notes section allows you to apply custom data to the voter that can only be seen by members of your committee. This way, campaigns can share information about voters privately, such as things they mentioned in conversation, best times to call, or notes about where they live.

Targets - During the Coordinated Campaign, target groups will become available for particular activities. These will be groups the State Party and Coordinated Campaign have determined to be fruitful prospects for various activities.
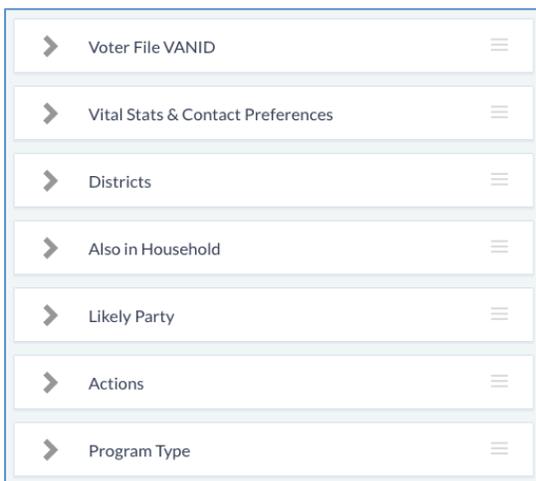
Relationships - In this section, we can build our understanding of an individual voter by linking them to other voters either by a familial, organizational, or friendly connection.

Scores - Scoring Data is information about a voter that is based on a model. It is an estimate based on research data. Scoring Data typically ranks voters on a 0-100 scale. The central difference between Scores and other types of data in VAN is that Scores are guesses that are applied to lots of voters, while Activist Codes and Survey Questions represent definite knowledge about voters you have contacted directly.

Codes - Codes can apply to many items in Votebuilder, like Organizations, Events and Locations. Not to be confused with Activist Codes, which only apply to individuals. They give users a lot more flexibility to create custom groupings of information, and are similar to hashtags in that respect.

The right hand side of the profile page will also provide some helpful information about an individual voter.

› Voter File VANID	≡
› Vital Stats & Contact Preferences	≡
› Districts	≡
› Also in Household	≡
› Likely Party	≡
› Actions	≡
› Program Type	≡

Voter File VANID - The Vote File ID tells you what unique ID numbers are appended to that voter. The VAN appends one ID (Vote File ID), while the State Department of Elections appends another (DWID). If this record is also linked to a My Campaign record (a prospective volunteer), a My Campaign ID will also appear.

Vital Stats & Contact Preferences - Vital stats indicate someone's age, date of birth, Party Registration, and gender. Because gender is not a question on the Voter Registration form, the VAN software uses an algorithm to determine someone's gender by based on his or her first name. Occasionally, voters will be marked as "U" for unknown, if the system was unable to determine their gender by their name alone. This is also the section where you can mark a voter as Deceased or Do Not Call. Both of these codes apply system-wide and are very hard to undo, so please use extreme discretion when applying these codes.

Districts - This section will tell us in which districts this person resides in. First, we see their media market. Next, we see their county, and if applicable, which City Council district they live in (only applies to the City of Wilmington). In VAN, "Precinct" refers to the Voter's Election District, and is written together with the Representative District they live in – 0706 means the 6th Election District in the 7th Representative District. You will also see which State House, State Senate, and County Council (County Commissioner in Votebuilder) disticts, and housing development the voter lives in.

Also at Primary Address/in Household - This tool allows you to see other registered voters living in the same house. This tool pulls by address, rather than name, so you will see spouses, children, roommates, etc. in this field. Be wary of apartments- if the voter hasn't indicated an apartment number, the system may group them together. Clicking the name takes you to their profile.

Likely Party – This is another score assigned to voters based on data found in Votebuilder. The ranking estimates the person support of either party based off of things like activist codes, vote history, and survey responses.

Actions – This is where you will be able to save the page layout by clicking "Save Page Layout" and save any changes you've made to a person's profile by clicking "Save All". Most profile segments will save new information once you hit enter but it is good practice to "Save All" as well.

Back on the Main Menu there should be a panel below *Quick Look Up* simply titled *List*. Here you will be presented with the following set of options.
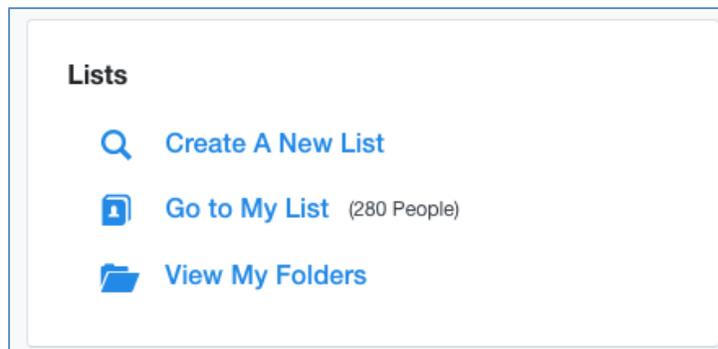
Go to My List
At any time, you can return to the most recent search you ran from the home screen by clicking "Go to My List." This way, you can work on other projects without losing your search criteria.

View My Folders
From the home screen, you can pull up any list or search you have saved by clicking the "View My Folders" icon. Select the folder, and then select the list (or search) to load it into the "My List" section. Any time you add a new list, you will be asked to confirm that you want to override your current list. Make sure you have saved any changes you need to save, and then confirm.

Create A New List

Create New List is the primary method for searching multiple people and is one of Votebuilder's most important tools. From here you will be able to create lists that can be used to canvass, create call sheets, export data for mailers, and much more.

Create a List greatly expands upon *Quick Lookup*'s search criteria options and allows you to create list based on most information found in a person's Voter Profile. As with the profile pages, this page is also broken up into a series of categorized sections. These sections are what you will use to set the criteria for each list you cut in Votebuilder.

Next to each criteria section there should be a chevron, for opening/closing sections, and a star, for favoriting sections. Favorited sections will appear with a gold star and will be elevated to the top of you Create a New Search page.

Location - You can select voters by where they live, using either the *Location* or the *Districts* sections. Under location, you must choose a county (even if your district is all within one county) before options for Precinct (ED), County Commissioner (County Council or Levy Court), and Development become available to you.

Please note, Legislative Districts are sorted separately from other location criteria. The State House and State Senate fields are found under *Location Districts* not under *Location*.

Any time that a section title is blue (like Precinct to the left) you will have the option of using a "picker." A picker will display all of the options within that category, and allow you to select more than one. Perhaps you'd like to canvass several adjacent neighborhoods in one afternoon- you can use the Development "picker" to select several neighborhoods at once.

Though you can select individual streets from the "Create a List" option, there is a much easier option for creating walk list/packets, which we'll cover later in the VANual.

Activist Codes
You may search for voters that have certain data appended to their files. Any activist codes you have access to, you will be able to search by.

Age - Registration Date
Allows users to search by birth date, age, registration date, or even zodiac sign. Registration date can be helpful for targeting newly registered voters whether they're first time voters or transplants.

Household Party Counts/Household Sex Counts
This allows you to search people based upon how many members of a given party/sex live at that same address. *Household Party/Sex Counts* work the same way that *Also in Household* works on the profile page.

Canvass Results

You may also search voters based on whether or not you have canvassed them (in this instance, "canvassed" means contacted- it could be through several methods), and what the result of the canvass was. At the top you will pick "include" or "exclude," to determine what kind of search results you are looking for. Perhaps you want to exclude everyone you have successfully canvassed (and those marked as deceased), but include those who were not home, busy, or asked you to call back the first time you reached out. You can also narrow by canvass type (call, walk, letter), date attempted, or date entered.

Voting History

The Voting History section will allow you to select voters based on which elections they have or have not participated in. You can select based on multiple criteria: "Any" allows you to pull up a voter who has voted in at least one of a number of elections you can choose from, while "All" requires that the voter has voted in each of the elections you choose.

The remaining three codes will pull up a text box and require you to enter a number; for example, you could search for a voter who has voted in "At Least One" of several elections (could be two or four or five), "Exactly One" of a series of elections (no more, no less), or "No More Than One" of a series of elections (could be one, could be zero).
In order to find voters who voted in 2016, but not in 2012, you would have to run a two-step search using the "Remove," "Add," or "Narrow" features (covered ahead)- searching for those who voted in 2016, and then removing those who voted in 2012.

Survey Questions

Once your campaign has started applying IDs to the file, you can search for people who have answered a certain way or within a particular period- e.g. someone who said they were undecided early in the campaign, that you would like to circle back to.

Likely Demographic Information

These fields are based off of algorithms and surveys created at the National Party's level. They each take a number of factors into account but are essentially educated guesses. Though very few campaigns find this data useful, you have the ability to search by these criteria.

Suppressions

Here you will be able to determine what data is excluded from or included in the list you're creating. Suppressions are designed to use field results and vendor processing on the voter file to clean your lists for the type of voter contact you're doing. The DNC has access to voter registrations from all 50 states and some national confirmation databases. They have built in instances where houses can't be canvassed, or where we know a voter has moved. 99.9% of the time, you should leave the default options checked.


Preview My Results

On the left-hand side of the *Create A New List* page, you will find a preview of your search. The criteria you've selected will be displayed in this menu but none of the criteria will be "locked in" until after you click "Run Search." To get a general idea of what your list will look like, click "Preview My Results." This will give you a quick snapshot of the list you will create using the selected criteria. By default it will show you the number of people and clicking the "+" ("-" in the graphic) will give you the number of Phones, Doors, and Mailboxes in the list. It is good practice to preview your results before running a search.

This menu also give you the "Add Step" option. This lets you edit your search even further. We'll cover this in more depth in the next section.

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Once you're satisfied with your list, click "Run Search" to create the list.

Working With Your List

Once you've run your search you should be presented with a screen that looks similar to the one below (names removed).
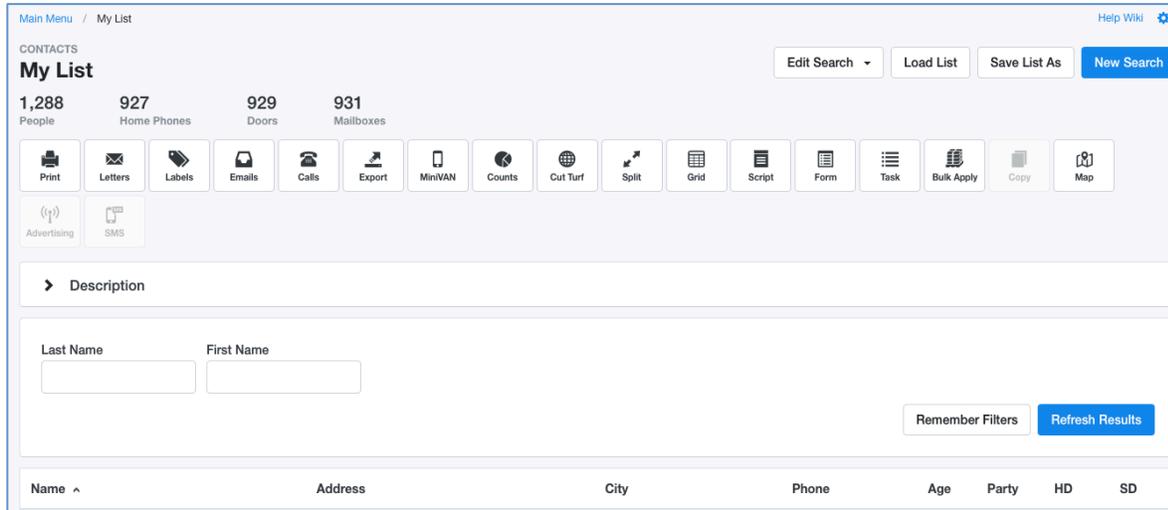
This page is essentially the hub for most actions you will need to perform with your active list. In this section we will go over some of the major aspects of this *My List* page.

Edit Search

If, for whatever reason, you're unhappy with the list you ran, click *Edit Search* to make adjustments to your list without starting from square one.
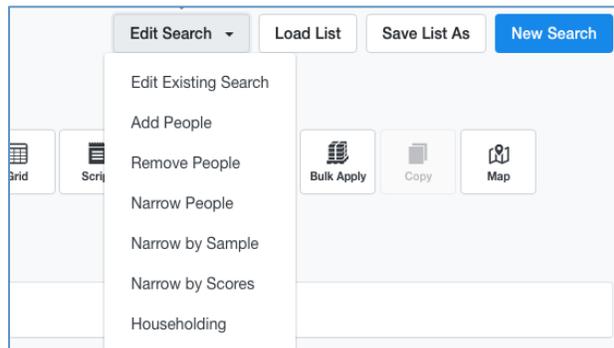
Edit Existing Search
Takes you back to the *Create A New List* page. The page should look identical to the one you were on before clicking *Run Search*, all your search criteria should still be selected.

Add People
Allows you to add people to your existing search. You can click the *Add People* to enter a completely new set of criteria, and then combine the two searches. For example, if you ran a list of people who voted in the 2014 mid-term elections but wanted to include people who registered to vote between 2014 and 2018, you would add those people through *Add People.*

Remove People
Allows you to remove people from your existing search. This is the opposite of the *Add People* function. Clicking this will take you to a page where you'll enter criteria for people you do NOT want in your list. This could be useful if you ran a list of everyone who voted

in 2014, including Republicans (because you want/need to reach some soft Republicans), but you want to remove Republicans who voted in primaries.

Narrow
Allows you to create another level of refinement to your search. For example, if you ran a search of everyone who voted in 2014 (adding new voters and removing primary-voting Republicans), but now you want to narrow to only one ED so you can canvass that list. Using the "Narrow" feature, you can find only the people who fall within both sets of criteria.
- *Narrow People* - Lets you select criteria by which the list will be narrowed
- *Narrow by Sample* - Creates a random sample of records on your list
- *Narrow by Score* - Narrows the list to a desired number of records with specific Scores

Householding
Lets you add or remove people based on household-centric criteria that you select. Here you can choose to only have one voter per household appear on your list and exclude people with a voting address that is already in another of you saved list. How helpful this feature is depends on how your campaign wants to canvass and phone bank.

Save List As
If you have run a list that you would like to return to in the future, you can save that list. Users have the option to either save the List or save the Search. Saving the List saves the exact search results (a fixed list of people), while saving the Search saves the search criteria (a dynamic list of people). To recall a saved list, either select it from the *My Folders* page or select *Load List* on the *My List* page.

Once a list/search is saved to a Folder it can be shared with other members of your committee. To share a folder, simply open it and select *Edit Folder* in the right-hand corner. From the *Edit Folder* page, access to the folder can be granted to (or removed from) other users in your committee. Simply select the user(s) who need access, and add them to the appropriate column.

Interacting With Your List
Near the top of the My List page you will find a series of options that will allow you to interact and manipulate with your list in different ways.

Print
The option on the far left will allow you to print reports from your list of voters in a format you can actually use. When you choose these report formats, you will be able to print out the information you'll need to either phone bank or walk the voters on your list.

Though the *Print* tab will allow you to print call sheets, there is a far better way to print walk sheets using the Turf Cutter.

Letters

This option allows you to print form letters from the list that you've created- basically a high-tech version of a mail merge. You can add a new form letter from the main home screen by clicking on the administrative options in the lower left, where it says "Letters," then choosing "Form Letters." On this page, you will see a list of all form letters you have previously created, and an option at the upper right to add a new form letter. This will allow you to type in the text of the letter, which you can then customize with the individual's name and address. When you select the "Letters" option from the "My List" toolbar, you will be taken to a page, which will allow you to choose options for your letters, then print your letters as a set.

Labels

The labels option is frequently used in conjunction with the Letters option, as it will allow you to print address labels for the voters on your list (you could also use it to print labels for postcards, generated without the form letter). Several standard label formats are included, if you have a need for custom formats please contact the State Party.

Emails

If your campaign has access to Votebuilder email services, clicking *Emails* will take you to the blast email setup page. You will first need to set up a Form Email, much the same way you would need a Form Letter for the *Letters* option.

Calls

This button will allow you to set up Robocall, Predictive Dialer, and Virtual Phone Bank campaigns.

Export

Here you will be able to export and download portions of data from Votebuilder. A Party Administrator must approve every export before they can be completed. With the exception of downloading voter data en masse for use offline (prohibited by the State Party), the most frequent uses of the export function will be accomplished in other ways:

- *Mail merges* - this feature can be accomplished using the "Letters" option.
- *Exports to send to consultants* - Contact the State Party.
- *Phone lists, walk lists, etc.* - Use the VAN's native reports to print out this data.

MiniVAN

MiniVAN is an app that you can download on your smart phone. It is available in both the Apple App Store and the Google Play Store. MiniVAN allows volunteers, staff, or candidates to take walk lists on the go, without all the paperwork. They'll be able to access and enter data in the field. Once lists have been put into report formats they will be assigned a *List Number*. Entering this number in the MiniVAN

app will allow canvassers to work from their device instead of a piece of paper. MiniVAN is elaborated on in the Advanced Administrative Tools section.

Counts

The *Counts* option will allow you to segment your list into groups and run counts of those groups. This may allow you to get a big-picture sense of the make up of your district. *Counts* will essentially allow you to create tables.

Sample

Sampling will take a random sample (you choose the size) from your list. This could be useful in instances like blind polling or crosschecking any IDs you think are suspect.

Split

If your list is too large, you can split it into one or several parts. We advise using Narrow Search, rather than Split Search, so you can control where the split actually occurs.

Grid, Script, Form, etc. (Data Entry)

This will allow volunteers to take your list and send it straight to the data entry screen. This option is most useful for Script View, which, like virtual phonebanks, will allow your volunteer to enter data as they make calls.

Cut Turf

This is one of the most useful features in the system.

If your campaign is going to maximize its use of Votebuilder, you will need to familiarize yourself with this feature. *Cut Turf* will present everyone on your list on a map that you will be able to divide up into individual turfs (walk lists) for your team to canvass.

You will only be able to save 30 turfs at a time, so it's often best to think small when creating your list to cut. Limiting your list to "walkable houses only" helps cut your list to only addresses that are geo-coded to appear on the map.

After a turf is cut is assigned a *List Number*. These numbers will make entering the results of your canvass much easier. *List Numbers* are only good for 30 days, so **only cut the turf you think you can walk in the next 30 days** in one sitting**.** Usually, printing one ED at a time is sufficient.

To cut turf, click the icon that looks like a globe. You will be taken to a Google map, with a dot representing each household on your list. This is where you will cut turf.


On this map, you will be able to click to set point/boxes. Use these points to section off the parts of the map you want in a particular turf. Votebuilder will connect the points for you. Think of this like putting up a fence. Just use the points to set a perimeter around the area you want make up your turf. To complete a turf, you must close off that section of the map by clicking back at your first point. Once you've done that, the lines and dots should change from yellow to some other color (each turf will be assigned a different color).

Under the Legend box you can see each turf that you have made, and the number of people/houses in that turf. There are two icons at the top right corner of the Legend box. With these icons, you can toggle the option to display numbers of people, houses, or both. The layers icon in the top left corner of the map allows you to swap between an illustrated map (pictured on page 22) and a satellite map.

You can also have VoteBuilder cut your turfs for you with *Auto Cut*. The *Auto Cut* icon (has a star in it) is located at the top left corner of the map. After clicking the *Auto Cut* icon, you will be asked to choose between having "Equal number of addresses per Turf" or to "Group addresses close to each other." You can also select how many turfs you would like to have, or how many addresses per turf.

In a suburban area, a typical volunteer or pair of volunteers can usually canvass about 60 doors in a two-hour shift. Single volunteers often move faster than a pair of volunteers, which is why that number is 60 either for a pair or individual. As you get to know your volunteers' abilities, you can adjust this number.

Also found on the *Cut Turf* page are the *Eraser* and *Undo Last Click* options. The Eraser Icon,

located to the right of the Auto Cut icon, will clear all the turfs on the map. The Undo Last Click icon (a curved green arrow) will remove your last click and essentially revert the last action that you have made in Turf Cutter.
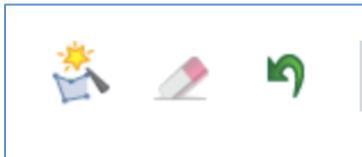
When you have cut all of the walkable houses into maps, click *Save & Finish*. Clicking *Save* will only save the Map Region. Save & Finish will save the map region and turfs.

Please keep in mind, Votebuilder logs users out after half an hour of inactivity, and it does not consider cutting turf to be an active use of the VAN. Therefore, before clicking "Save & Finish," you may want to open a second tab and make sure you are still logged in. If you have been logged out, you can log back in in that second tab, and you will be able to keep working in your original tab with Turf Cutter open. **Many organizers have lost maps in the middle of some very long nights by forgetting this trick!**

Saving, Recovering, & Printing Your Turfs/Maps

When you go to save the turfs that you've just cut, you will be taken to a page where you will have to name the region and place it into a folder. This is pretty straightforward; it's like saving any other document.

Keep in mind that this functions save the information to your Votebuilder profile, not your computer. Once it's saved you'll be able to pull it up on any computer that you're logged into Votebuilder on. You will be able to find your turfs under the *Canvassing* Section of the Main Menu.

Completing the *Save My Map Region* page will take you to the *My Turfs* page. This page will present you with a view of all of the turfs you've cut. Following the *Turfs* link on the Main Menu will also take you to this page.

The *My Turfs* page is where you will start the process of printing walk list for canvassing.

Of note on this page
- *Turf* is the name you assigned the Region Name earlier
  - o Votebuilder will add a number to the title of each individual turf (this is not the list number)
- *People/Doors* tells you how many of each are included in the entire turf (the lighter row) and the individual turfs (the greyed rows).
- *Last Out/Distributed* lets you know the last time the turf was printed. This is also where the list number will appear (not pictured).
- *MiniVAN Status* displays recent activity of MiniVAN users that have been sent or have downloaded the turf.
- *Progress* lets you know the percentage of the turf completed by MiniVAN users on the latest list number or MiniVAN export. Progress through printed list is not reflected here.
- *Jump to Folders* gives you a different view of this same information but with a focus on the folders themselves not the turfs. You will have to go through different pages for each folder.

- *MiniVAN* lets you manage some of your MiniVAN options.

Quick Actions is where you will find most of the key features on this page.
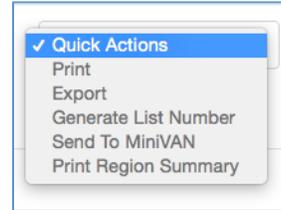
- *Generate List Number* will generate a list number for the Turf, which can be used by canvassers on MiniVAN to access the Turf.
- *Send to MiniVAN* sends the selected Turf to the MiniVAN export page to send turfs to canvassers.
- *Print Region Summary* allows you to print out a summary of each turf, not the walk lists. This will only give you a basic map, a copy of the script, and an overview of the region.
- *Print* will print out the entirety of the turfs. This is the best option for printing list for canvassing.

Printing Your List/Turf

The *Print* page is where you will decide what your walk list will look like. The most important things you select on this page are the Report Format, Script, and the contact method (*Contacted How*). This is the same page you will see if you select *Print* on the *My List* page.

- *Report Format* - determines what your printed list look like. Your campaign will be allocated a number of report formats by default. These formats are designed to cover most situations. If there is a problem with a format, please contact the State Party.
- *Script* - will allow you to select the script you want canvassers to follow. Scripts belonging to your campaign committee can be found in the Administrative section of the Main Menu under *Codes | Questions | Scripts*.

This will determine what survey questions/responses and activists codes are applied to individual voters when you enter the data later.

- *Contacted How* – allows you to select the method in which you will contact the voters on your list. This will determine your Canvass Result Options, these are options available for voters you're unable to reach.

Once you submit your list for printing it will take you to a page confirming the process and letting you know that document will be available under *My PDF Files*. You can follow the link on the confirmation page or click *My PDF Files* on the main menu (upper left panel).

From here you should be able to download a pdf version of your turfs for printing.

When printing/exporting list, it helps to make the name as specific as possible. The system fills in "My List" as the title by default. Once you've printed two or three rounds of reports, it gets very hard to tell what "My List" refers to. It's recommended to title your reports with dates, universes, locations and/or activities, e.g. "2017-05-14 Back Creek canvass."

The data that you extract from Votebuilder, using the methods described above, will only be useful to you if you are able to put it back into the system. In the next section we will go over how to enter data back into Votebuilder.

Loading Data

Data is no good if we just take it out of the system, and can't put it back in to learn from what we're doing! The *Load Data* section of the Main Menu will give you several different ways to put the data you collect back into the database.

Quick Mark

This is essentially the data entry equivalent of *Quick Lookup*. The Quick Mark page will allow you to quickly apply one particular piece of data to a group of people. This mode is particularly convenient if you have acquired a list somewhere other than VoteBuilder. You will be asked first what kind of data to apply and details on how it was obtained. For this example we are applying an Activist Code.

Once you've completed both steps, your screen should look just like the *Quick Lookup* screen. Search on this page the same way you would if you were using *Quick Lookup*, all the same rules apply. When your search results come up you will be able to check a box next to the voter you want to apply the data to.

Once you have marked whom you need to, clicking *Save/Search* will record the changes. For efficiency purposes it's recommended that you type out your next search criteria before hitting *Save/Search*. That way you can save the date you entered on your previous search and run your next search at the same time.

Quick Mark saves you from having to go into each person's *Voter Profile* to add data to it. For longer lists, particularly lists you pulled from Votebuilder, it may not be the most efficient option.

The other primary methods for data entry are *Script View* and *Grid View*. With either method you will be able to enter your list number to help expedite the process. On printed turfs you can find the list numbers on the cover page and at the bottom of each page. Remember that the List Number expires after 30 days. Once you have cut your lists, work through them quickly and don't leave data entry lying around waiting to be put back in.

You may also elect to use your active list or *Quick Look Up* (*Grid View* only).

Script View

This tool will allow you to view a call/walk script on your screen, alongside information for one voter at a time. It can be a convenient way to make calls and do data entry at the same time. We recommend using this tool when making volunteer calls from My Campaign, so you can enter many kinds of data at once.

On this page, will be able to see a person's name, phone number (cropped from image) and the script you selected earlier. You can enter results, survey responses, and apply activist codes as you proceed through the script. Once you've completed the script click *Next* to save your data and proceed to the next person.

The defining characteristic of Script View is that it allows you to follow along with the script as you enter data for one voter/person at a time.

Grid View

The most common way to enter data from canvassing and phone banking events, Grid View offers a table-style interface where people from a selected list appear along with possible responses and Canvass Results from the selected Script.

Address	City	Party	Age	Phone	Result	Canvasser	RS Issues	ResistVol	Knock Doors	Make Calls
939 Bethel Church Rd	Middletown	D	25	(302) 685-2951		Williams, Travis			☐	☐
939 Bethel Church Rd	Middletown	D	19	(302) 547-3353		Last Name, First Name			☐	☐
3 Chancellorsville Cir	Middletown	D	53	(302) 376-5465		Last Name, First Name			☐	☐
3 Chancellorsville Cir	Middletown	D	52	(302) 376-5465		Last Name, First Name			☐	☐
7 Chancellorsville Cir	Middletown	D	56	(302) 324-0269		Last Name, First Name			☐	☐
7 Chancellorsville Cir	Middletown	D	57	(302) 376-3797		Last Name, First Name			☐	☐

Here you'll be able to enter data similarly to how it appears on your sheets. On each page you can enter results, survey responses, and apply activist codes to multiple voters/people. Once the page is complete click next to save your data and move on to the next page.

Quick Tasks

Back on the main menu you will also find the Quick Task panel.

Virtual Phone Bank
Here, you can log directly into your virtual phone bank and begin making calls. Virtual Phone Banks will be covered more in depth in the Advanced Administrative Tools section of the VANual.

Relationships
This tool allows you to code individuals as having a relationship to you. The screen looks just like Quick Lookup or Quick Mark, but when you find results, you can code the person as your neighbor, classmate, colleague, cousin, etc.

My Campaign

My Campaign is the volunteer management tool affiliated with VoteBuilder. It contains individuals we put in - including previous campaign volunteers, Party activists, or folks we want to track for other reasons (perhaps college students who aren't registered to vote in Delaware).

Access *My Campaign* by clicking the *My Campaign* tab in the upper right corner. You will notice the tab at the top of My Campaign is yellow, rather that the blue tab on My Voters. This makes it a little easier to tell which database you're working in.
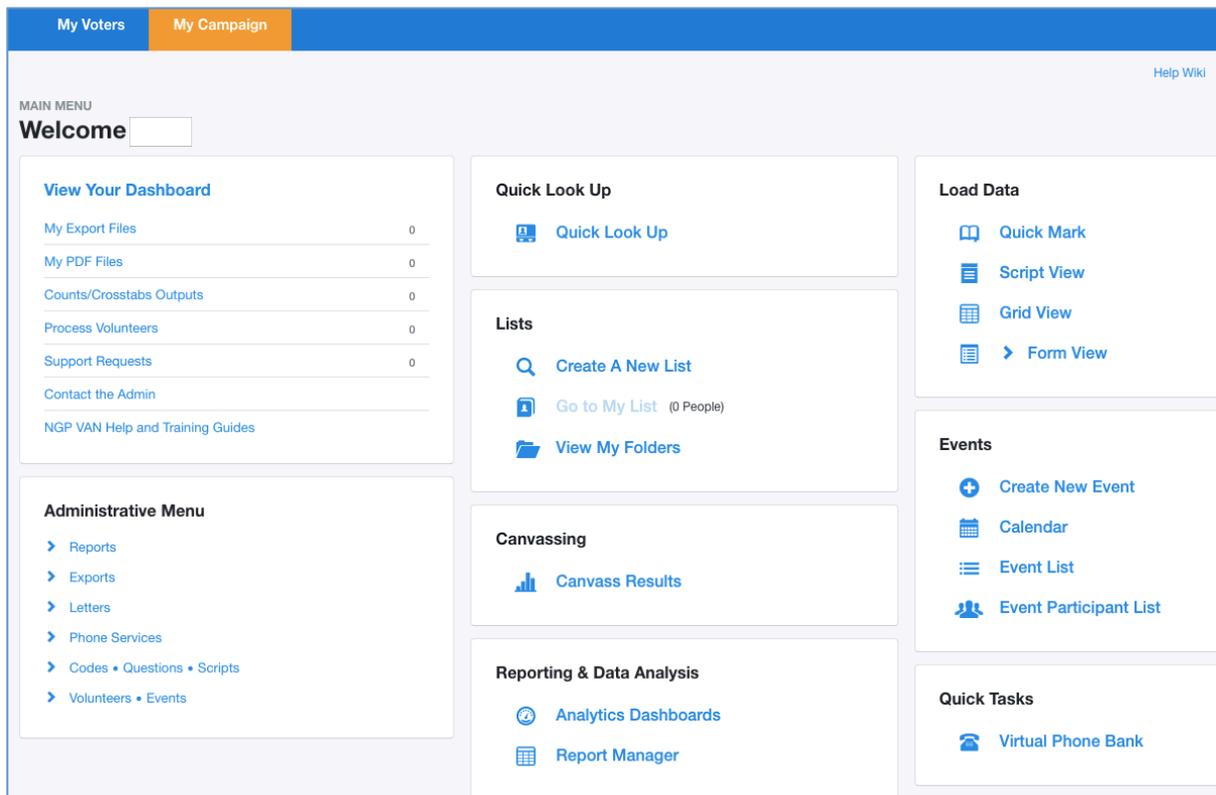
Because many of the options in My Campaign work exactly the same as the options in My Voters, we'll just skip to the things that are different.

When Searching...
You must now narrow by State, before you can select a district, ED, development, etc. You may have people who are interested in traveling from out of state, or who sign up for emails, from many different states. The software must know which state to look in before it can figure out how to search by district.

Adding a New Volunteer

Within *My Campaign*, you can add additional volunteers from the *Quick Lookup* screen. If you search someone's name and they do not appear under the search, you will be given the option to "Search my Voter File." This will search the My Voter's database to see if the person has a voter profile already. If you can find the voter you wish to add as a volunteer, select the bubble next to that voter's name and click *Copy Person*. This will copy over any information from their voter profile to their volunteer/My Campaign profile.

If the person does not show up, you can manually enter the volunteer using any data that you know. Common reasons for a person's name not to appear in either database include:

- Only being registered to vote in a state other than Delaware. This occurs most frequently with college students but can also happen if you have volunteers/donors from across state lines.
- Being too young to vote. High School students may seek to get involved by volunteering for your campaign/committee.
- Not being registered to vote at all (in which case you should help them register)

Control Panel

Q Search My Campaign

🗐 Copy Person

First select a person from the list below

👤 Add New Person

If the person is not listed below, click here to add a new person

The Volunteer Profile

Within My Campaign, you will notice a new profile section on each person's Voter Profile. This section, the Volunteer Profile, contains information about when the volunteer is available and what kinds of activities he or she would like to do.

Form View

After selecting a volunteer, this option provides a quick and easy way to enter volunteer sign-ups from a form that you have previously created.

Events

One of the best features of *My Campaign* is the ability to plan and schedule events, and add volunteers to those events, making it easy to track volunteers, confirm them before an event, and monitor whether or not they attend.
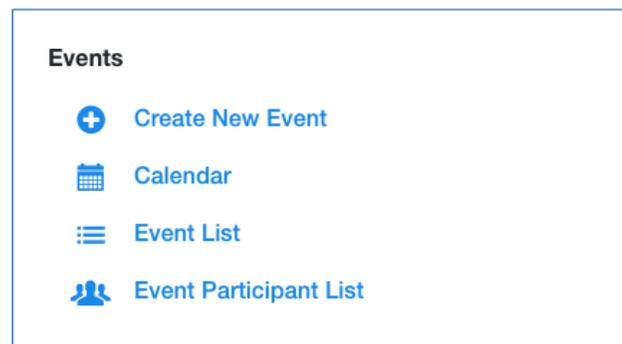
Under *Events* on the home screen should be several options:
- *Create New Event* will take you directly to the Create Event page. It's good practice to double check to make sure an event doesn't already exist before creating a new one.
- *Calendar* will display your events in a classic calendar view for a month. Scheduled events will appear as links on each calendar day.
- *Event List* will display your scheduled events in a list format. Viewing events as a list is a good way to get more calendar data onscreen at once.
- *Event Participant List* lets you view the participants you have registered to different events.
- You will be able to switch back and forth between the Event Calendar and Event List via an option at the top right of either page.
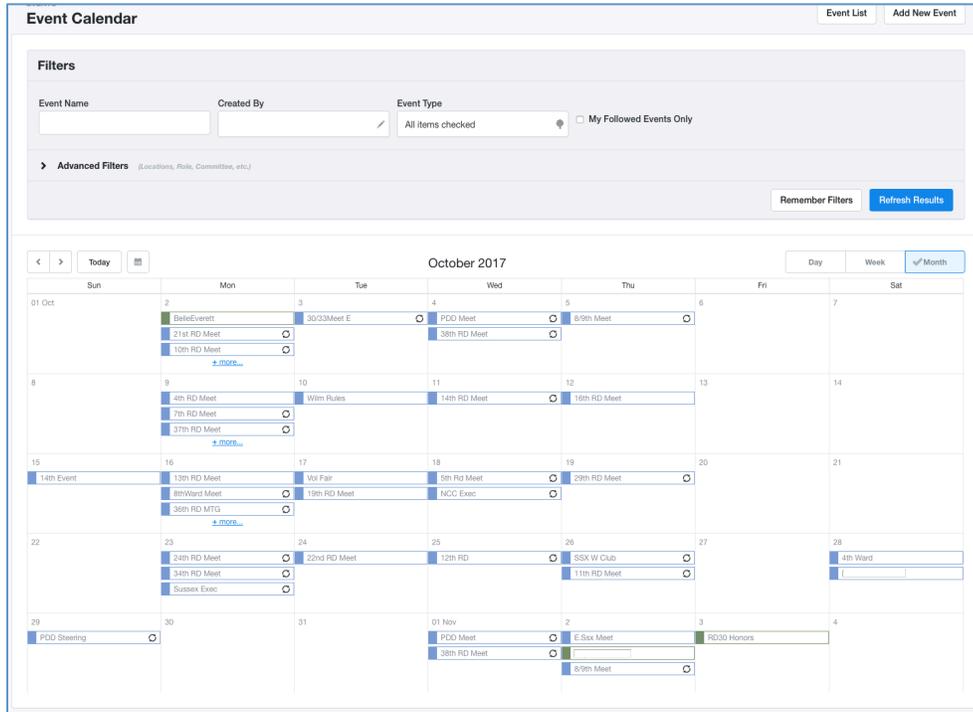
From either *Event* page layouts, you will be able to search the events you currently have scheduled. Select an event to view its event profile. These are essentially the event-equivalent of an individual's profile. You can click the different profile sections to view additional information about the selected event.
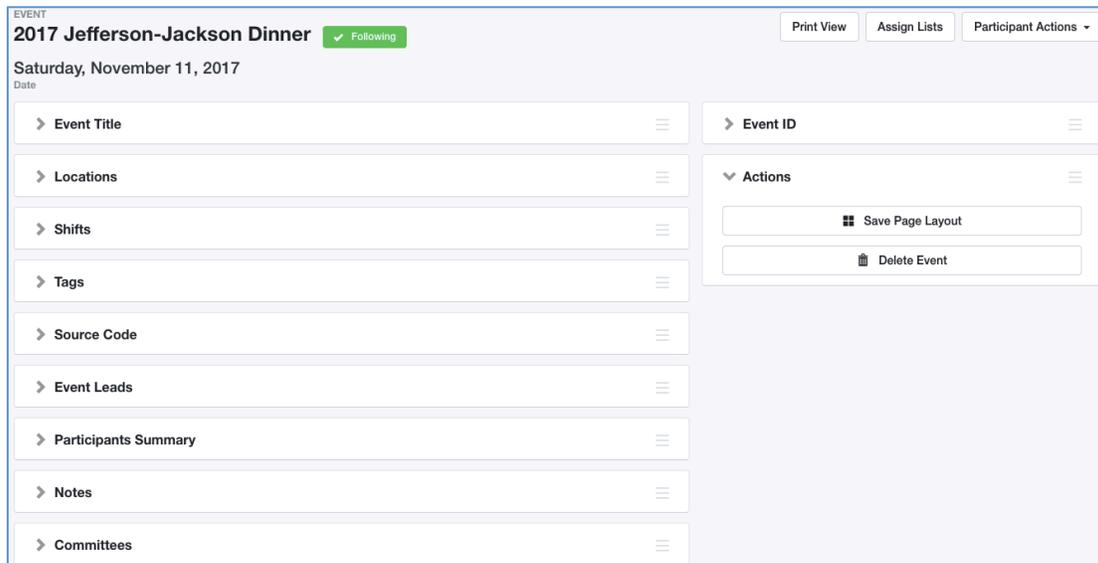
Most of the information on this page will be input or automatically generated when creating the event (Title, Locations Shifts, etc.).

Of note on this page:
- *Participant Summary* is where you will find the volunteers you have associated with or signed up for an event.

- *Participant Actions* gives you assignment options to assign participants to an event and to view current participants (same as *Participant Summary*)
- *Assign Lists* allows you to assign list to the event's participants. You will need to know the list number in order to do this.

Create a New Event

You can add a new event by clicking the *Create a New Event* button in the upper right corner of the screen.

When adding a new event, you will be asked to select the event type from a drop down menu, and then provide additional information about that event.

Although only the first "Name" tab needs to be filled out on the screen below, you should put as much information as possible in the calendar, so if you have others helping you schedule volunteers, they will have all of the information at their fingertips.

EVENTS
New Canvassing

| Name | Shifts | Repeat | Location | Roles | Sharing |

Name*

Short Name*

Date/Time From *   mm/dd/yyyy

Date/Time To *   mm/dd/yyyy

Description

Next   Finish

Shifts

If the event is taking place all day, you can indicate that it will have multiple shifts. A second page will then ask you for the breakdown of shifts. You will also be asked what kinds of activities volunteers will be tasked with at this event.

Repeat

For recurring events, you can schedule your event to repeat itself on the calendar daily, weekly, or monthly.

Location

The location tab allows you to select from pre-defined locations*

Roles

Create minimums, maximums, and goals for each Role assigned to the Event Type.

Sharing

Through the sharing tab, the Event creator can decide whether or not others can edit this event, or whether the event is posted on a website.

Once you've entered the details click *Finish* and you will be directed to the Event Profile page from earlier. You will be able to edit the details of your event from here.

*Locations must be logged in the system in order to be associated with an event. To save a new location click *Volunteers|Events* (it should be the last option) in the Administrative section of the My Campaign Main Menu, click *Locations* from drop down options. This will take you to a page listing all of your saved locations. You can search your saved locations on this page. The location searching function can be tricky. Often times it is better to enter the minimum amount of information to help broaden your search.

At the top of this page you should see an option to *Add New Location*.

The *Add New Location* link will take you to a page that requires you to enter a Name, Address, City, State, and Zip for the new location. Once you've entered that information and clicked *Next* your new locations should be saved. You will then be taken to the *Location Profile* page. Here there are more profile sections where you'll be able to enter even more details for your locations.

When creating a new location the database will scan saved locations for duplicates. If it finds a match you will have the option of confirming the match and not creating a new location.

Scheduling People for an Event
The event scheduler can be accessed from Quick Mark, Grid View, Script View, Form View, and Virtual Phone Bank.

One of the easiest ways to schedule people for an event is through *Quick Mark*. Click on *Quick Mark* from the Main Menu, and select the last option, *Schedule for event*. You will then be taken to the Calendar to select the correct event. Then, select the data that you wish to apply, including the role of the person attending the event, and the canvasser. From there you should be able to run *Quick Mark* much the same way you do in My Voters.

Remember, if you cannot find a person, click *Search My Voter File* and copy the correct person over from the voter file into MyCampaign.

After an event has been completed, please go through and update the volunteers' data to show whether they cancelled, completed the event, or didn't show up. This helps your campaign and the campaigns statewide now and in the future. If you have scheduled a volunteer 15 times throughout the course of the campaign to phone bank, and the volunteer canceled 10 times, if we schedule them as an Election Day phone banker we'll know we will likely need a backup.
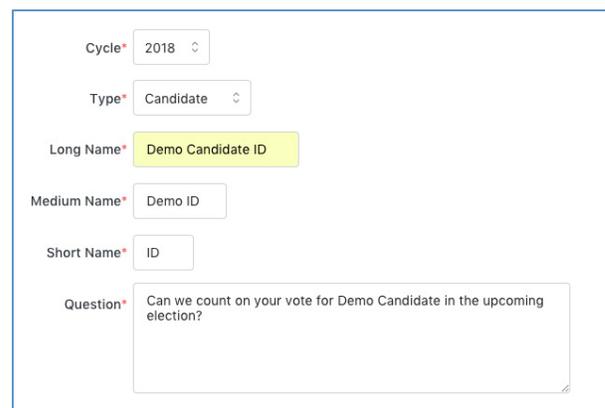
Advanced Administrative Tools

Next we will cover some of the Advanced Administrative Tools in Votebuilder. Your individual access to these functions will depend of a number of factors (user access, Committee Type, etc.). If you have additional questions regarding these features please contact State Party staff.

Survey Questions/Activist Codes

Survey Questions and Activist Codes are a vital part of voter outreach and help campaigns store and utilize information collected about voters. Both can be found on the Administrative Menu panel of the Main Menu. The process for creating both Survey Questions and Activist Codes is very similar.

Select *Survey Questions* or *Activist Codes* from **Codes|Questions|Scripts**. From this screen, you can view and edit existing Survey Questions and Activist Codes. By default, the State Party provides a basic Candidate ID question for each committee. In the top right hand corner there should be an option to *Create New Survey Question/Activist Code.*

To Create Survey Question, you'll need to enter the required fields. For the most part, this information is internal. The Cycle, Type, and Name fields will determine how the question is organized in the database. The *Question* field determines what will appear in a Script and walk/call list. Once you have filled in the text and details, click the "save" button.

For survey questions, you will be required to enter Survey Responses. These are the options that canvasser/phone bankers will use to categorize a voter's answer to your question. It's best to keep these responses simple. For example, most campaigns use a simple scale to gauge support for a candidate or issue (Support, Lean Support, Undecided, etc.). Some campaigns also choose to do generic survey questions asking which issues matter most to a voter. In these cases you'd want to list broad issues as your response options.

Response	Resp Medium	Resp Short	Master Response			
1 - Strongly Support	1	1		⌄	Edit	Delete
2 - Lean Support	2	2		⌃ ⌄	Edit	Delete
3 - Undecided	3	3		⌃	Edit	Delete
4 - Lean Otl	4	4	⌄			Add

After you've contacted voters, you will be able to search them based on their Survey Response in *Create A New List.*

For *Activist Codes,* you would follow roughly the same process.

The required fields vary a bit but the general concept is the same. The name options are the internal. *Long Name* and *Activist Code* will determine how the Code is organized within Votebuilder. They are also the options that will most often be displayed while using Votebuilder.

Script Question is not a required field but if the intention is to use this Code when canvasing or phone banking, it should be added. This will be the question that appears in the call/walk lists scripts.

If a question's response can be boiled down to a binary answer of Yes or No, it's probably better to use an Activist Code. That way, if the voter says yes you can tag them and if they say no you leave them untagged. If a question requires a more nuanced response, it's better to use a Survey Question.

Another way to think of it is if you want to track a person's response regardless of the answer. You don't need to track voters who said no to a yard sign but may want to track voters who said they were leaning towards supporting your opponent.

For example, the State Party typically uses an *Activist Code* for Volunteers and attaches the *Script Question* of "Would You Like to Volunteer to Help the Campaign." We would use

a *Survey Question* for candidate IDs and use a scale to denote the voter's response (Support, Lean Support, Undecided, etc.).

Building Scripts

Survey Questions and Activist Codes are the two main elements that make up a Script in Votebuilder. From a bare-bones standpoint, Scripts in Votebuilder are essentially just sets of Survey Questions, Activist Codes, and Text. The process of building a script is simply piecing these elements together.

To access your committee's Scripts, select **Codes|Questions|Scripts** on the Main Menu. From the *Scripts* page you'll be able to access all of your campaign committee's scripts. By default, the State Party provides a basic Candidate ID script for each committee. To create a new script, select *Add New Script* in the top right-hand corner.

The options on this page are mostly internal. They will be visible in Votebuilder by your committee's users. The script's **Name** may appear on printed sheets but it will depend on the list format. **Database** will determine if the list is available in My Voter or My Campaign. Once you've completed the New Script fields and click *Next*, you will be taken to the page where you can assemble the elements of your script.

For this example we're going to create a **Linear Script**. This is the most common type of script you will encounter in Votebuilder.

Branched Scripts are formed using the same method as linear scripts but are used exclusively for MiniVAN and the script will follow different paths depending on a voters response to questions.

To insert a Survey Question, Activist Code, or Event invitation (in My Campaign) into your script, simply select them from the drop down menus, and click *Add*. The element will then populate in the *Script*
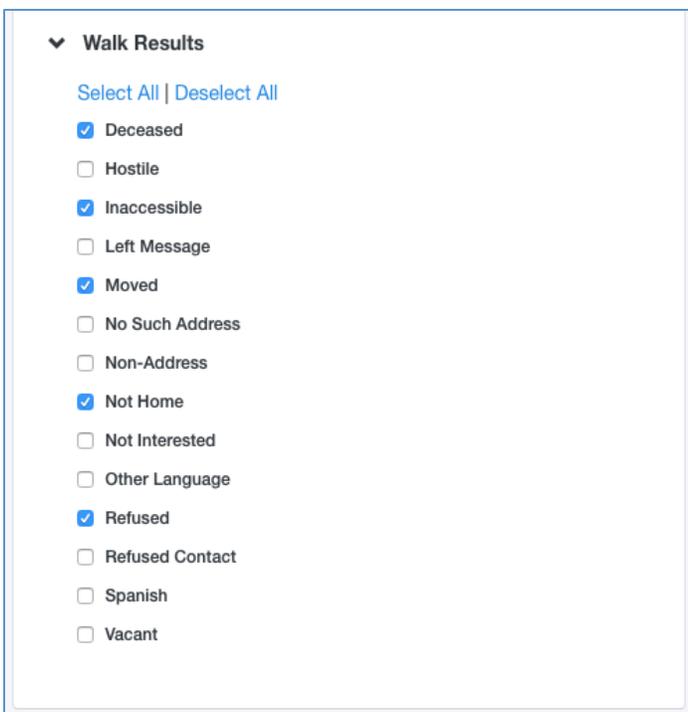
Preview. It's best to limit the number of elements in your script, as too many questions can become unwieldy and inefficient for volunteers. The longer they have to spend with each call/door the fewer voters they'll reach.

It is also important to keep in mind that you won't be able to create new Survey Questions or Activist Codes from this screen. Script Elements must be created beforehand.

Text can also be added to your script. This can be used to volunteers with basic information such as introduction guidelines or candidate info. Text elements are not quantifiable in Votebuilder so do **NOT** use them ask substantive questions about the campaign or issues.

Once elements are in the script, they can be rearranged in the preview panel. Elements can also edit or delete an element (from the script) using the options on the right-side of its panel.

Before saving your script, make sure to review the *Canvass Result Options* on the right-hand side of the screen - the default settings for phone results and walk results will already be selected, but selections can be added and removed as necessary. These options will determine the options available for unsuccessful attempts to contact a voter. For example, if a volunteer attempts to contact a voter who is not home, you want them to have the option to mark that voter as not home. That way the campaign can attempt to reach the voter again another time. There are a few options that are selected by default but you may make changes to these options as your campaign evolves and encounters different recurring situations.

Virtual Phone Banks (VPBs)

When phone banking, organizers have the option of printing out call sheets for volunteers, or creating a virtual phone bank within the VAN.

From the *My List* page select *Calls* menu option and choose *Set up Virtual Phone Bank List* from the pop up window. Some campaigns may also choose to enable the options to set up predictive dialer campaigns through VAN or third party service, CallFire (these options are subject to additional fees).
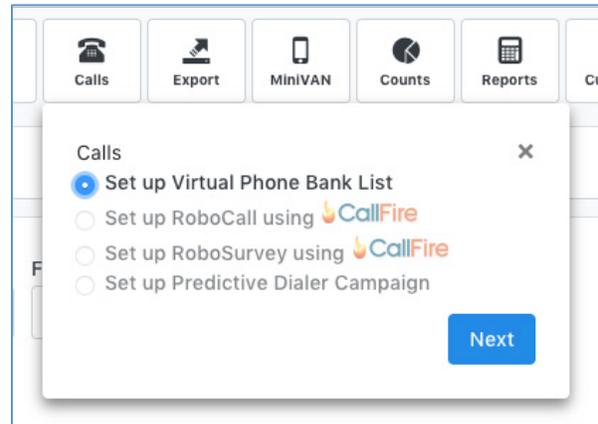
Clicking next will send you to the **Virtual Phone Bank Details** Page, where the majority of the phone bank is set up.

Virtual Phone Bank Settings

Organizers will need to name the phonebank, choose a script, and set a start and end date for the phonebank. The phone bank will only be available to volunteers on the user end during the time between the start and end.

Events – Organizers will also be able to include an Event Scheduler in your phone scripts. This will allow callers to schedule supporters for upcoming events. Simply check the "Include Event Scheduler" box, and select the date range and event types that will be shown to callers.

Sharing - VAN's Open Virtual Phone Bank option allows organizers to give virtual phone bank access to volunteers who do not have VAN user accounts. Anyone with the link to an OpenVPB will be able to access it. To publish an OpenVPB, simply select the "Publish" option on the *Sharing* Panel.

Display - On the Display Settings panel, you can customize the display screen that volunteers will see as they phonebank. Organizers can choose which contact information will be visible and editable by volunteers. Once you are happy with all of the phonebank settings, clicking the *Save and Preview* in the Display Settings panel will create a preview of what the phone bank will look like from the user end.

The back end of your virtual phone bank can be accessed at any time through the **Main Menu** > **Phone Services** > **Virtual Phone Bank**.

Making Phone Calls

Once the settings of the Virtual Phone Bank have been finalized, Votebuilder will generate a VPB Code unique to that individual phone bank. The VPB code can be given to any phone banker with a VAN user account to allow them to access the phone bank. They can click **Virtual Phone Bank** on the Main Menu and enter he code when prompted.

VPB Code

Use or share this code with your phone bankers to access this Virtual Phone Bank.

3FE542Q-408570

Copy

OpenVPB

https://www.openvpb.com/vpb_bycode/3FE542Q-408570

Copy

If the phone bank was published as an Open VPB, Votebuilder will also generate an Open VPB link that will need to be sent to volunteers.

When volunteers without VAN user accounts click on the OpenVPB link, they will be prompted to create an ActionID, and then log in to begin making calls.

OpenVPB and VAN's regular Virtual Phone Bank feature are optimized for mobile devices. Volunteers will be able to make calls from many different devices. A volunteer who logged in to the phonebank on their smartphone through an OpenVPB link will click on the phone number to call the voter, and can input the Survey Responses directly on their device.

To track phone bank progress and results, you will have to access the back end of the phone bank again. Select *Virtual Phone Bank* under *Phone Services* on the Main Menu. On the VPB List page click the chevron on the far right-hand side of the row and choose "View Report" from the drop down menu.

Mail ▪▮ 📶   6:01 PM   ⬈ ⁂ 100% ▬

🔒 openvpb.com   ↻

⚙ **Demo Phone Bank**   **Log Out**

About Jary   *View*

Jary Smith
(555) 487-0909
71-year-old M

+1 (555) 487-0909

Cancel   Call

Whon
presidential election?

Choose an option ▾

Do you need a ride to the polls on Election Day?

Choose an option ▾

What Issues Are You Most Concerned About?

‹   ›   ⬆   📖   ⬜

Calling Rounds

When a voter's name appears on a caller's screen, that person is immediately made unavailable to anyone else who is calling. This is intended to prevent campaigns from calling the same person multiple times in a short period of time. If the person being called is not available because they are not home, the line is busy, etc., then that person's record will be temporarily pulled from the list and will only reappear in the VPB list when the organizer sends the VPB to the next round.
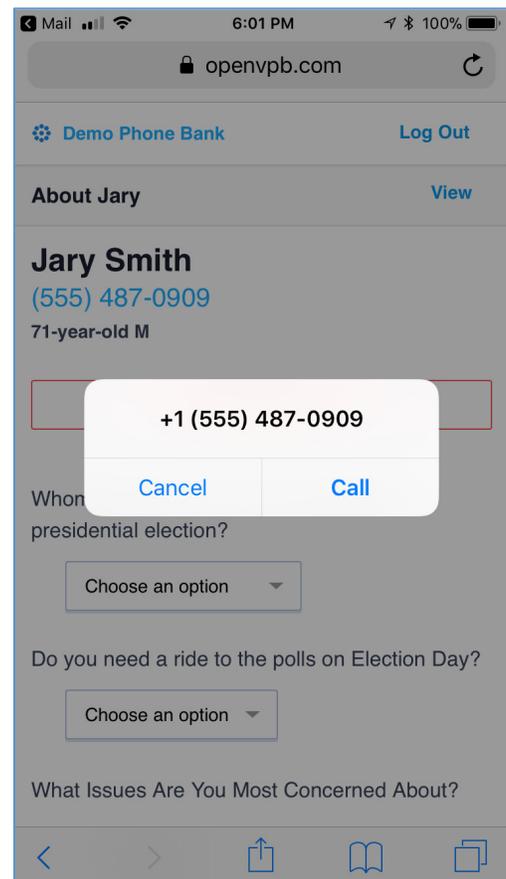
MiniVAN

MiniVAN is NGP VAN's mobile canvassing app, allowing volunteers to receive turf and enter data on their smartphones rather than paper and clipboard packets. MiniVAN users do not need Votebuilder user profiles to access data, making it ideal for large campaigns looking to cut down on paper and/or to improve efficiency.

To gain access to MiniVAN volunteers will first have to download the app from their smart device's app store. It is available in both the Apple App Store and the Google Play Store.

Once the app has been downloaded, the user will be asked to login. If you or the volunteer already have an ActionID use those credentials to log in. Volunteers without an ActionID will need to create one.

Please keep in mind, there are two ways to log in to Votebuilder, with an ActionID or with a VAN ID. If you use a VAN ID to log on to the desktop version of Votebuilder you will need ActionID credentials to log into MiniVAN.

Once the user has logged into MiniVAN there are two ways they can access their list.

1. Users can enter the list number assigned to their list/turf. This is the same number that we used earlier in the VANual to do data entry. These numbers are found on the bottom of printed list, visible on the *My Turfs* page. To save paper, list numbers can be generated and assigned to turfs without printing. Simply select *Generate List Number* from the *Quick Actions* Menu.

2. Turfs and lists can also be sent directly to other users on the committee. This method requires a few extra steps on the organizer's part but makes for a more streamlined experience for volunteers. To send turfs to users, organizer's will need to establish a MiniVAN Format, MiniVAN Campaign, and have their canvassers logged in the system.
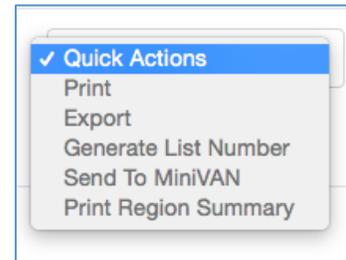
MiniVAN Format

MiniVAN Formats will determine how a voter's information will be displayed in the app. As a courtesy the State Party provides a few default formats that should cover the needs of most campaigns. There is also the option to create new MiniVAN Formats to tailor formats to the needs of your campaign. To do this, select *Add New*

MiniVAN Format on the MiniVAN Formats page and choose which criteria you want displayed from the drop-down menu. Clicking and dragging the left side of the field will rearrange the selected criteria.

MiniVAN Campaign

MiniVAN Campaigns will help determine what scripts a canvasser will follow and how the data is handled. They are essential pairings of MiniVAN Formats and Scripts. To build a MiniVAN Campaign select *Add New MiniVAN Campaign* in the right-hand corner of the MiniVAN Campaign page.

Here you will choose which MiniVAN Format will be associated with the campaign. This cannot be changed once the volunteer is in the field. Script Details will provide a few options for organizers. They can choose one script that applies to everyone in the list or set a default script with alternates. Alternate scripts can be applied based on the canvassers input or the targets attributed to the voter.

Auto-Syncing will allow data entered into MiniVAN to be synced with Votebuilder automatically. This does **NOT** mean that the data is locked into the system yet. It will still need to be committed by an organizer in the desktop version Votebuilder.

Once the Format and Campaign have been set up, organizers should be able to send list/turfs directly to MiniVAN by selecting the MiniVAN option on the *My List* page or choosing Send to MiniVAN on the *My Turfs* Quick Action menu.

Committing MiniVAN Data
Once Data has been entered in MiniVAN, organizers need to ensure that the data has been locked into the system. Many campaigns that canvass areas using MiniVAN will have trouble recalling the data if no one took the time to commit it into the system.

MINIVAN
MiniVAN Commit   Export To Excel   Commit

Contacted By	Status	Date From	Date To		☐ Show Individual Syncs
	Pending ⬍	🗓	🗓		
					Refresh Results

☐	List Name	Sync Date	Syncs	Canvasser	Attempts	Doors	Canvassed	Contact Rate	NH	Moved	Refused	
☐	List 24379553-		2		56	38	24	42%	30	0	0	Delete
☐	List 24379543-		1		5	3	4	80%	1	0	0	Delete
☐	List 24379543-		1		52	37	21	40%	30	0	0	Delete
☐	List 24379254-		1		54	39	31	57%	23	0	0	Delete
☐	List 24119217-		1		28	21	9	32%	16	0	0	Delete
☐	List 24119206-		1		6	6	0	0%	3	0	0	Delete
☐	List 24119217-		1		32	23	16	50%	15	0	0	Delete
					7 Batches · 1 Page							

To commit MiniVAN data select *MiniVAN Commit* under the MiniVAN option on the Main Menu.

On the Commit Page organizers can track the progress of the canvassing session, how many attempts have been made, the contact rate, etc. Organizers can also delete synced data without committing it on this page. This is helpful if a canvasser misuses the app, either through malice or ignorance, and the organizer knew the data wasn't properly entered.

To commit Data to your Votebuilder campaign committee, check the boxes next to the proper data sets, and click *Commit* to lock it into the system.

Users Management
Certain high-level statewide campaign accounts have basic administrator permissions allowing them to manage lower level users within their committee. This is done primarily to allow large statewide campaigns autonomy from the State Party. Most often campaigns use this feature to allow interns and data entry volunteer access to basic functions. The State Party highly recommends contacting party staff before delving into these features.

User management functions can be found under **Users | Committees** on the Administrative Panel of the Main Menu.

User Profiles – These are essentially sets of permissions that users will have. It's best to organize these by broad campaign roles (interns, data entry, etc). You should not be creating new user **profiles** for each time you add a user. These profiles are applied to the users, they are not the users themselves. A few of these will be included by default but creating them is simple. Select Create User Profile on the User Profile page. Once you've named and provided a description, simply select the functions you want users with that profile to have.

Users – This is where you will find all the users with access to your Votebuilder Committee and be able to manage some them.

Campaign administrators will be able to edit user accounts that appear in blue text and view login activity of other members on the Committee. This is also where admins will be able to create new accounts. Before creating users, it's a good habit to search inactive users beforehand. To do so, clear out all the search criteria with particular attention to the *Status* field, it should either be empty or say Inactive. Once that's done you can click *Refresh Results*. If the person you're creating an account for appears in the results simply reactivate their account. If they do not appear, click Add New User in the upper right-hand corner.

Add New User – This process requires care and attention. To add a user you are required to provide a first and last name and an email address. Next you will need to assign a profile to that user and assign them to a district. Both of these options will be dependent on the user role in the campaign.

Once *Create User* is clicked the user will be sent an email from Votebuilder asking them to log in and set up the rest of their account. The links in that email expire after 48 hours so it is important that they log in as soon as they're able. This also means that it's important to be mindful of when you're creating user accounts.

Hey Why Can't I...

Use Barcodes?

You may hear references from campaigns in other states that use barcodes to enter data. The Delaware Democratic Party does not typically enter data using barcode scanners for two simple reasons: the equipment is expensive and often faulty. Additionally, it's not really much faster than entering data by hand. If your campaign is really interested in barcode scanners, contact your Voter File administrator for an explanation of how the scanners work, and to change your access to allow barcode scanning.

Perform Bulk Uploads?

What if you have data in a spreadsheet that you'd like to upload en masse? It's very easy for bulk uploads to go awry, as such, State Administrators will process all bulk uploads (this could include attaching an activist code to a list of voters, or uploading a large list of new volunteers).

Create survey questions, scripts, reports, and activist codes?

To ensure the consistency of data, the State Party will create all survey questions, scripts, reports, and activist codes. Your committee will get some standard questions, scripts, reports, and codes by default. If you find that the default options don't address your needs, contact the Voter File administrator to add additional options.

Export data without approval?

Misuse of data is in violation of the voterfile contract that every campaign committee signs. Exporting data makes misuse incredibly difficult to track. The State Party's perspective is that the information in Votebuilder is only useful if it's actually *in* Votebuilder. Exporting massive amounts of data runs directly counter to that. Typically, when staff denies an export request it's either too large and we want to prevent offline replication and/or sharing of the data or because exporting is not the most efficient way to achieve whatever it is that the user is trying to achieve. In the either case, the State Party will work closely with campaigns/committees to accomplish our mutual goal of reaching out to Delaware's voters.

Print a list of neighborhoods or district maps?

From a practical standpoint, Votebuilder organizes people not land. As a result, everything in Votebuilder is designed to contact voters and neglects tools that would be used to monitor land areas.