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VANual: A Guide to Votebuilder

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# Contents

Purpose .............................................................................................................................................. 3
What is Votebuilder? .............................................................................................................................. 3
Logging into Votebuilder ........................................................................................................................ 4
    Changing Passwords.......................................................................................................................... 6
    Past Accounts .................................................................................................................................... 7
Basic Structure of VAN .......................................................................................................................... 7
    My Voters ......................................................................................................................................... 8
    My Campaign .................................................................................................................................... 8
    Committees ....................................................................................................................................... 9
    Basic User Created Objects ............................................................................................................ 10
Basic Navigation ................................................................................................................................... 12
Built in Training Materials ..................................................................................................................... 14
Quick Lookup ....................................................................................................................................... 16
Voter Profiles ....................................................................................................................................... 17
Creating Lists ...................................................................................................................................... 19
List Creation Tutorial .......................................................................................................................... 20
Accessing and Sharing Saved Lists ....................................................................................................... 27
Using Your Lists .................................................................................................................................. 29
Printing Lists ....................................................................................................................................... 30
Using Turf Cutter and Printing Walk Lists ............................................................................................ 33
Data Entry ........................................................................................................................................... 41
    Quick Mark ...................................................................................................................................... 41
    Grid View ....................................................................................................................................... 43
Glossary .................................................................................................................................................. 47
Purpose
This guide is intended to get you started using Votebuilder topics include:

- What is Votebuilder?
- Logging in for the first time.
- Using VAN's built in training documents
- Searching for Voters
- Viewing a Voter’s information in Votebuilder
- Creating Lists
- Saving Lists
- Sharing Lists
- Printing Lists
- Using Votebuilder’s Turf Cutter to create walk packets
- Entering data into Votebuilder

This is no means and exhaustive lists of the capabilities of Votebuilder but should be used for new users to get familiar with Votebuilder or for users who have a narrow scope of what they need to use Votebuilder for and do not want to get bogged down in all of the little details.

What is Votebuilder?
Votebuilder is an online database and is also often referred to as “VAN”. This database contains two sections. “My Voters” which contains information about every registered voter in the state and “My Campaign” which allows political parties and candidate campaigns to track and manage their volunteers. Votebuilder is exclusive to Democratic organizations and is used by every State Democratic Party and Democratic candidates ranging from Barack Obama’s Presidential campaign to local races. This standardization across states and campaigns has given Democrats an enormous advantage over other political parties for several reasons: existence of a large user base familiar with the VAN; data is no longer kept in silos walled off, not easily accessible to others; since Votebuilder went national in 2007 Democratic Parties and campaigns have been putting data into the system regarding voter’s candidate preferences; constituency issue data is stored which has helped create finely tuned models of political preferences and voting behaviors. Most importantly, Votebuilder cuts down on the time a candidate committee would have to spend acquiring data allowing them to spend precious time on other campaign activities.

Why use Votebuilder?
Why should you use Votebuilder instead of a paper list or a locally created database?
Votebuilder is updated monthly with the Vermont Statewide Voter Checklist obtained from the Secretary of State which has up to date registration information on all Vermont voters

- Votebuilder contains voting history information for Vermont’s General, Primary, Presidential Primary, and Municipal elections in one easy to search place
- Years of collecting Survey Responses from voter contact have helped create the “Likely Party Model” contained in Votebuilder which classifies Vermont voters as a Republican, Democrat, or Independent. There is no other database available in Vermont that makes this classification as accurate as Votebuilder.
- Votebuilder contains data enhancements such as additional phone numbers, address corrections, and certain consumer information that is not available from the Vermont Secretary of State or local lists
- Votebuilder organizes your data in a secure place that can be accessed anywhere as long as you have an internet connection
- Votebuilder allows you to save the lists you create and share them with other uses digitally

Logging into Votebuilder

To access Votebuilder you will need an internet connection and a modern web browser, recommend browsers include Internet Explorer, Firefox, and Google Chrome. It is also important that you update your browser regularly since using an out of date browser may cause some loss of functionally.

Updates can be found at the following URLs


Typically, the first time you log into Votebuilder you will receive a login link in an email sent to you by your VAN administrator. Following this link will begin the account set up process. If a VAN administrator has already created an account for you with a password you will be asked to change that password the first time you log in to ensure your password is only known by you.
After setting your password you may be asked to also set up a PIN number. Enter the letters that correspond to the numbers you would like to use for your PIN and confirm the entry, hit “Next”. Keep in mind the letters associated with the numbers change each time you login so it is the numbers you need to remember **not** the letters (In the example below setting a PIN of “1234” would require typing in “DKRL”).
After setting up your password and PIN you will need to fill out several required fields to create your profile. These include Name, address, email, and at least one phone number you can be reached at. After filling these out you are all set up and ready to start using Votebuilder.

Changing Passwords

For security reasons every VAN user must change their password every 30 days. To make it easier to remember your password it is often a good idea to make the last character in the password a number and just increment it by 1 every 30 days i.e. your password “password1” becomes “password2”. When you login and are due for a password change you will be asked to set a new password and confirm it. This policy is standard across VAN and everyone from volunteers to statewide administrators must do this.

If you have forgotten your password make one attempt to guess your password and you will be taken to an “Access Denied” page. Click on the link that says “Forgot your Password” and you will be able to enter your user name and email address to receive a password reset email.
Follow the link in the email you receive to begin the password reset process. If you have forgotten both your password and user name contact either your campaigns VAN administrator or the statewide VAN administrator to receive a password reset.

**Past Accounts**

Your VAN account never disappears, but it is often inactivated if it has not been used in a certain amount of time or when the campaign your VAN account was attached to ends. If you had an account in the past, it is important you let the VAN administrator know. Rather than make an entirely new account for you they can simply reactivate your old account and send a password reset to you. Accounts can be also be used for multiple campaigns. For example say you currently have access as a member of your local County Committee, but have begun volunteering for a Governor’s race. The VAN administrator for that Governor’s race can likely just give you access to their Votebuilder committee in addition to your County Committee access rather than make you and entirely new account for that campaign. This is helpful to you since it avoids having several account user names and passwords to keep track of.

**Basic Structure of VAN**

Votebuilder is really two databases in one. These different sections are called **MyVoters** and **MyCampaign** and contain different information and have different purposes. It is important to use the correct part of Votebuilder for the task at hand. You can easily tell which part of Votebuilder you are in by looking at the tabs at the top of the page. If you are in **MyVoters** the tab selected will be dark blue. If you are in **MyCampaign** the tab will be orange.
My Voters

MyVoters keeps track of all the registered voters in the state and includes a wealth of information gathered from a variety of sources on each individual voter. This information includes:

- Contact information: Phone numbers, physical and mailing addresses
- Geographic Information: Town, County, Legislative Districts, Wards
- Demographic Information: Age, Sex, Race, and Ethnicity
- Voting History: For General, Primary, Presidential Primary, and Municipal Elections
- User Added Data: Survey Question responses, Activist Codes, Contact History

The MyVoters side of VAN is the most commonly used part of Votebuilder. It is where campaigns create lists for phone, walk mailing programs as well as store the responses they receive from their voter contact efforts. MyVoters is also where you will find the contact information for Town, County, and State Committees, Activist Codes for constituency issues, information on absentee ballot requests, and polling place information of individual voters.

My Campaign

MyCampaign is the volunteer management side of Votebuilder. A Committee’s MyCampaign database by default starts with zero people in it, and as volunteers and activists are recruited they are added to the database. Many of the tools such as list creation and reports available to you in MyVoters are also available to you in MyCampaign. Thus, when you learn one side you will be familiar with the other. An important distinction between MyCampaign and MyVoters is that records located in MyCampaign do not need to be registered voters in the state since you may have volunteers under the age of 18 or from out of state. MyCampaign allows the user to do the following:

- Store volunteer and local activist contact information.
- Create lists of volunteers.
- Keep track of preferred volunteer activities.
- Use a built in calendar to track volunteers scheduled for canvasses, phone banks, etc.

**MyCampaign** is typical only used by large campaigns with large volunteer operations or local party groups who need to track volunteers and activists over long periods of time. Every Committee has their own **MyCampaign** database which cannot be viewed by other committees.

**Committees**

Committees are created in Votebuilder by the statewide administrator for individual candidates or organizations and act as an access barrier for those entities. Users outside a committee are not able to access the information such as contact history, Survey Question responses, and Activist Codes unless they give access by that committee to view those records. This ensures a campaign's activities are not being viewed, or that their data is being used by another campaign. This is particularly important in primary races. As a user you are granted access by one of the Committee’s who have access to Votebuilder, i.e. Vermont Democratic Party, Shumlin for Governor, or the Vermont Democratic House Campaign and you are only able to access the information for that committee. A user may belong to several different Committees, i.e. the County and Town Chairs committee and the Vermont Democratic Party but has to switch between Committees to view information that is stored in one committee but not another. If you belong to multiple Committees, you will be asked which one you want to log into before entering your password and PIN and you are also able to change your Committee after logging in by clicking the pulldown in the upper right hand corner next to your and clicking “Switch”.

![Select State and Committee](image-url)
The important thing to note if you belong to multiple committees is to make sure you log into the right one before starting work.

**Basic User Created Objects**

Before going much further, let’s take note of a few of the commonly created user objects found in Votebuilder. These will be discussed in greater detail later but for now you should have a general idea of what these objects are and what they are used for.

**Survey Question** – A survey question is used when you want to track multiple responses to a single question. The most common type of Survey Question is used to track candidate support.

An example of a typical Survey Question is “Will you be supporting candidate A for reelection?” with the following responses

- Strong Support Candidate A
- Leaning Support Candidate A
- Undecided
- Leaning Support of Opponent
- Strong Support of Opponent

**Activist Code** – An Activist Code is a yes or no question that you only want to track the “yes” answers for. Activist Codes are commonly used for tracking members of Town and County Committees, identifying if a voter is passionate about a particular issue, yard sign requests, or if a voter is a member of a constituency group such as a unions, teachers, gun owners, etc.
Scripts – Votebuilder allows the user to create Script that will be printed when a call or walk list is printed. These scripts can contain any mixture of text, Survey Questions, and Activist Codes. Scripts are important since the Script is what is displayed when Virtual Phones Banks are called through, control which responses are available when using MiniVAN, and decide what activist codes and survey questions are displayed on call/walk sheets.

Report Format – Report Formats are how you decide what and where a voter’s information appears on a call or walking list. You are able to arrange various fields such as name, phone number, address, etc along with check boxes for canvass statuses such as “Not Home”, “Moved”, “Wrong Number”, etc, leaving room for a script for a phone banker or canvasser to mark down responses.
Upon logging into Votebuilder you will be taken to the **Main Menu**. The **Main Menu** has several distinct sections:

- **Message Center** – This section is where you are to access your created lists for printing and export requests. It also contains links to request accounts, and submit support requests. Finally, it is where you Votebuilder keeps track of your scheduled follow-up calls.

- **Admin Panel** – Many of the options in this panel are dependent on the User Access Privileges you have been assigned. In this panel you will find the options to create Survey Questions, Activist Codes, Scripts, and Report Formats.

- **Quick Lookup** – This section contain Votebuilder’s “**Quick Lookup**” function which is used to quickly find information on a single voter and view their “Voter Profile”.

- **List Creation/Storage** – This is probably the most important section of Votebuilder. This section allows you create lists based on any of the data you currently have access to. It is also where you access lists you have previously saved or reload your current list.

- **Data Analysis** – This section allows you to run counts and crosstabs of your lists or registered voters based on criteria such as town, voting history, age, etc. From here you can also pull reports of recent voter contact activity and what survey responses have been added.

- **Load Data** – This section allows you to enter data into Votebuilder in several different way, run bulk uploads, and commit canvassing data from the MiniVAN smart phone and tablet App.

- **Quick Tasks** – This section contains the icon you click to begin calling from Virtual Phones Banks.
There are also several helpful items that appear along the top menu bar just above the **Main Menu** that you should also be aware of.

**User Information Pull Down** – In the upper right-hand corner of the page you will see a pull down menu next to your name Clicking on this will give you a pull down menu where you can choose to edit your user profile information, change your password, switch your committee, change your PIN, and view help documents.

**Wiki and What’s New** – Just below the top banner on the right-hand side you will find several icons that can help you out. The “Help Wiki” icon will take you to Votebuilder’s built in Wiki regarding the page you are currently on. This Wiki is also searchable by topic. The “What’s New” icon will take you to page detailing Votebuilder’s most recent new features and changes to existing features. While not available on the **Main Menu** the settings gear is often present in this space.

Clicking this will allow you to change some the settings for certain sections of Votebuilder such as **“Quick Look Up”**

**MyVoters and MyCampaign Tabs** – These tabs are used to switch between the MyVoters and MyCampaign sections of Votebuilder. It is important you are in the correct section when working in the VAN since these different sections contain different data

**Breadcrumbs** – These show you where you are in the sites hierarchy and are used to navigate back to the main menu or previous page. Use this instead of the “Back” button on your web browser. Often times the last page you viewed in Votebuilder was a query of the database it will not be viewable by hitting the “back” button on your web browser.
Built in Training Materials

As was mentioned earlier this is by no means supposed to be an exhaustive guide to the functions and capabilities of Votebuilder. Luckily, VAN provides every user with access to VAN created training videos and guides after logging into Votebuilder. This is especially important for something like Votebuilder that is scalable to the needs of the user. You may begin using Votebuilder to create simple lists to print out for phone banking but find after some use you need to create Virtual Phone Banks (phone banks done over the computer rather than using paper lists) or learn how to cut turf for door to door canvassing. Because of the way Votebuilder is structured it allows you to learn as you go.

To access VAN's built in training material simply click on the link "NGP VAN Help and Training Guides" found on the left-hand side of the Main Menu page.

From here you have access to training videos and documents covering a wide range of topics that can be used to learn more about additional features of Votebuilder or give yourself a quick refresher on features that are giving you trouble.
In addition to the available training videos Votebuilder has a built in Wiki that can be accessed from any page. In the upper right-hand corner you will see the icon for the Wiki, simply click on this icon to be taken to an informational page about the page you are currently on.

Or you can search for a Wiki on a topic by typing in the text box in the right hand corner and clicking "Search" after clicking the Wiki icon.
**Quick Lookup**

*Quick Lookup* is a fast way to find out information on a voter based on criteria such as name or phone number. This is often helpful when you need information about a voter such as a phone number or polling location and only have some of their information such as their first and last name and the Town they live in. To access *Quick Lookup* click on the *Quick Lookup* icon found in the middle of the *Main Menu* page.

When entering *Quick Lookup* you will see several different search fields enter in the data you have on a voter and then click “Search” in the lower right hand below the text boxes to search on that information. Votebuilder will search on all of the fields and return the voter or a list of voters that meets those criteria. Clicking on the voter’s name will take you to the *Voter Profile* for that person.

A couple of things to keep in mind when searching for voters in *Quick Lookup*:

- While all of the search boxes can be used the search will only display results that meet all the criteria you have entered. So sometimes less is more. For example if you have the first name, last name, town of residence, and phone number of a voter you may only want to search on the name and town fields since phone numbers change regularly and the one given to you might not match what is in the database therefore preventing Votebuilder from finding the record.
- **Quick Lookup** is able to distinguish nick names from full names so typing in “Jim” in the first name field will return those with “James” as a first name.
- Typing partial names in the First or Last Name fields will return all names that satisfy that criteria. For example Last Name “Smith” First Name “J” will return all the John, James, Jake, Julie, etc Smiths in the database.
- The Gear icon in the upper right hand corner can be used to access the layout options and change what fields are displayed when the search returns a list of voters.

**Voter Profiles**

Clicking on a voters name after doing a **Quick Lookup** or creating a list will take you to their **Voter Profile** also sometimes referred to as the **Voter Record**. This profile contains all of the information we have collected about that voter along with any Survey Questions, Activist Codes, and Contact History your committee has access to. Data entry such as adding new addresses, marking a voter as deceased, and adding survey responses can also been done while viewing a **Voter Profile**. However, if a large amount of data entry needs to be done it is best to use one of Votebuilder’s quicker data entry options found under “Load Data” in the Main Menu.

The first time you look at a **Voter Profile** in VAN you will notice that all of the boxes have been collapsed. Clicking on the “>” in the corner next to that sections title will expand that section. Conversely, clicking the “˅” of an expanded section will minimize that section. A best practice is to expand the commonly used sections of the **Voter Profile** and click “Save Page Layout” in the lower left hand section of the **Voter Profile**. This makes it so those sections are always expanded when you view a voter’s **Voter Profile** so you don’t have to manually expand them every time you view a new **Voter Profile**.
Using the Voter Profile you can see all of the information you have to access to for that voter. Some of the more commonly useful sections of the “Voter Profile” include:

**Addresses** – Here you can view a voter’s registration and mailing address, and update their information by adding or deleting addresses.

**Polling Location** – Contains the name and address of the voter’s polling location.

**Phones** – Contains the phone numbers we have on file.

**Activist Codes** – Here you can see the activist codes applied to a voter. To remove an Activist Code simply click “Delete” next to the Activist Code you wish to remove. To add an Activist Code simply select an Activist Code from the pull down menu and click “save new”.

**Survey Questions** – Here you can see the Survey Questions applied to a voter by your Committee. New Survey Questions can be added by clicking “Add New Survey Response” at the bottom of the Survey Question section and filling in the relevant information. Survey Questions can be edited and deleted by clicking either “edit” or “delete” next to a Survey Question response.

**Early Voting** – Here you can see if a voter has requested an absentee ballot and if they returned it.

**Voting History** – Here you can view the voting history of an individual for General, Primary, Presidential Primary, and Municipal elections. A “Y” in the field indicates they voted, a “M” or "A" indicates the voted by mail, and in Presidential Primaries an “R” or “D” next to the “Y” or "M" indicates which party's ballot was taken if that information was available.

**Vital Stats** – This section includes the Likely Party, Sex, Date of Birth, Date of Registration, Primary Ethnicity, and Primary Religion. Likely Party is based on Party Points which are calculated based on past responses to Survey Questions, Presidential Primary Voting, and Activist Codes.
Creating Lists

What is the point of having a large databases filled with information if it can’t be used. Fortunately, all of the information found in a Voter Record can be used as criteria to search and create lists within Votebuilder. These lists can be used to create calling/walking lists to talk to voters about upcoming elections, mailing lists to send postcards to voters, lists of active Democrats in your Town or County, or really any other sort of list that can be derived from the information in Votebuilder.

A couple of quick things to remember before creating lists are as follows:

- You can only have one list active at a time so after you create your list you will need to save it before you can create a new list. This allows you to have access to multiple lists and share them with other Votebuilder users.
- You can always Add, Remove, or Narrow the lists you have created so it is often better to use a step by step process with simple searches rather than adding multiple criteria to one search.
- Much like with the Voter Record the sections of the “Create a List” page all sections by default minimize so you should expanded the commonly used sections using the "/>/<" icons in the upper left-hand corner of each section, or you can click on the star on the right-hand side to favorite a section and move it to the top of the page. You can change the order favorite sections appear by clicking on the title of the section and dragging it above or below other sections.
- When in the “Create a List” page if a word is blue like the picture below it means you can click on it to select multiple items in that category such as multiple towns or House Districts.

Because of the vast wealth of information that can be used to create lists it is often easier for new users to have some practice creating basic lists before experimenting on their own. The next section contains a quick step by step tutorial that will run you through the basic process of creating a list.
List Creation Tutorial

Step 1:
First let’s enter the “Create a List” screen and expand and favorite commonly used sections using the “>/<” icons in the left-hand corner and stars on the right-hand corner of each section. The sections we will be using for the tutorial are "Location", Likely Party", "Phones", and "Voting History".

Step 2:
Let’s start off by creating a simple list of Strong/Leaning Democrats in your Town. To do this select your “Voting Town” from the pull down menu in “Locations” (I have selected Burlington but feel free to select any town) and type in or select from the pull down menu “Strong Democrat” and “Leaning Democrat” in the “Likely Party” section.

Step 3:
the right hand side click on “Preview my Results”. This will show you counts for how many people/doors/mailboxes your list of Democrats contains.
Let’s say we have decided our list is too big and we want to remove the “Leaning Democrats” to make it a bit smaller. Click the “Add Step” button below the "Preview my Results" section to view a selection menu and click on "Remove Voters" to be taken to the “Remove Voters” page.

**Step 4:**
Now we need to select who we want to remove from our list. Find the "Likely Party" section again and type “Leaning Democrats” in the text box.

Now if we click "Preview My Results" again you will see the list is significantly smaller.
Step 5:
Now we have a list of just “Strong Democrats” in your chosen Town. Now let’s add the “Strong Democrats” in another Town to our list. Click on the “Add Step” button and select “Add People” from the menu.

Step 6:
To add the “Strong Democrats” from a neighboring Town select that Town from the “Voting Town” pull down menu in the “Locations” sections and “Strong Democrats” in the “Likely Party” section and click on ”Preview My Results"
Step 7:
We now have a list that contains all of the “Strong Democrats” in our two chosen towns. However, maybe we decided we don’t want the people in added in the last step in our list anymore. To undo this last step look in the right-hand side of the Create a List page and you will see a list of the current steps that make up your list.

You can always use the trashcan or pencil icons in right-hand side of the step title to either edit a step or delete the step entirely. We want just delete our third step that adds in the Strong Democrats for the neighboring area. Simply just click on the trashcan on the right-hand side of the "Step 3" title.
Step 8:
Now we are back to our list of “Strong Democrats” in our original Town. Say we want to make it into a calling list; we will want to narrow our list so it only contains people who have phone numbers. We also want to narrow our list by some voting history to make it a better target since our list will be used for Get Out the Vote calls. Click on "Narrow People" after clicking the "Add Step" button.

Step 9:
We are now at the Narrow List page. First let’s select our new criteria regarding phones. In the “Phones” section use the “Source” pull down to select “Check All” to add the new criteria that all voters in the list must have a phone number.
We also want to add some criteria regarding voting history, for list we are going to add the criteria that they voted in the 2012 General Election but not in the 2010 General Election. This is a good voting history criteria for Get Out the Vote programs in non-presidential election years since it narrows your list to people you vote in Presidential Elections, but may need encouragement to get to the polls in non-presidential years. To add this criteria find the “Voting History” section, and select “All” from the pull down menu. Now check the box next to the 2012 General Election and make sure the radio button is check for “Voted” and check the box next to the 2010 General Election and check the radio button for “Didn’t Vote”.

Now, we either add another step or if we click the “Run Search” button next to the "Add Step" button we will get our original list narrowed to those with confirmed phones and who voted in the 2012 General Election but not the 2010 General Election.

**Step 10:**
Now that we have the list we want for our Get Out the Vote calls, we should probably save it so it can be accessed later to create call list. Click the “Save List As” button in the right-hand corner to begin this process.
Step 11:
Select whether you want to save our list as a List or a set of Search Criteria. Since our list isn’t likely to change and we will be using it soon let’s select “Saved List”.

Step 12:
Now the rest of our options are available. Let’s create a new folder to save our list in by checking the “New Folder” box. What you name your folders and lists is up to you but it should be descriptive so you can keep organized.

Step 13:
Now you have created a list and saved it. You can access your list through your folders and will be taken to the “List View” page where you can use the options available to you in the “Task Bar” to create walking or calling list among a variety of other options.

Accessing and Sharing Saved Lists
To access a saved list you need to go to your folders. To do this click on “View my Folders” located on the Main Menu page.
You will now be at the “My Folder” page, here you can see a list of your folders, and add new folders by clicking “Add New Folder” in the upper right-hand of the page. Clicking on the name of the folder will take you to a page with a list of the folders contents.

When viewing a folder’s contents clicking on the name of the list will pull that list for you and load it into “List View”, note this will overwrite any list you are currently working on. When viewing a folder’s contents you can also edit or delete lists within the folder by clicking “Edit” in the “Edit” column of that list. To delete the list from your folder simply click the “Delete” button found in the box with your list’s information after clicking on ”Edit”.

One of the most important functions that is often overlooked the ability to share the contents of a folder with other VAN users. To do this while inside of a folder and click “Edit Folder” in the upper right-hand corner of the Folder View page.

In the “Edit Folder” page there is a section title “User Access” clicking on their name and clicking the “Add” button will give them access to your folder. This is extremely helpful for sharing lists between users but it is important to only share folders with people who need access to them since the people you share that folder with will be able to see all the lists you have saved in it. Sharing folders with people who do not need access can create clutter in the users “My Folders” area.
When sharing a folder you should decide whether or not you want the users to be able to save into that folder. With collaborative efforts this makes sense, but if you are an administrator who is sharing a folder with a large amount of users you usually do not want to give them this permission since they could save lists into it that could create confusion. The option to allow users to save into a shared folder can be found near the top of the page underneath the name textbox.

Using Your Lists

Now that you are familiar with how to create and save lists we need to turn those lists into a useable format from the “Task Bar”. You should already be somewhat familiar with the “Task Bar” since it is also used to save lists but we should first identify what some of the more common icons on it are for.

**Print:** This icon will print the current list you have active. This is commonly used to print calling lists, but can also be used to print a list for other activities such as poll watching.

**Cut Turf:** This icon will take you to Votebuilder’s Turf Cutter which is used to create walking lists. The Turf Cutter is a powerful tool that allows you to select groups of voters and place them into separate walking turfs making canvassing much simpler and should always be used when creating walking lists rather than just using the “Print” option.

**Labels:** This icon allows you to create mailing labels using your current list.

**Export:** This icon allows you to export your list to a Microsoft Excel file. There are several different export options, but it is most commonly used to get list into Excel format for
mail houses or robo call vendors. All exports must be approved by the statewide VAN administrator.

**Calls**: This icon is commonly used to set up Virtual Phone Banks. It also contains the options for setting up robocalls or predicative dialer services through VAN’s vendor partnerships. While Virtual Phone banks are free of charge VAN’s robo call and predictive dialer services require an additional fee.

**Counts**: This icon will take you to the Counts and Crosstabs page where you can run counts and crosstabs against your current list. This is often times helpful with larger lists to make sure they were created correctly and contain the voters you want.

**Split**: This icon allows you to spilt a list into groups based on the number of voters or phones before printing. This is sometimes helpful when creating phone packets to be distributed since you can easily control the number of phone calls each list will have.

**MiniVAN**: This icon allows you to export your list to your MiniVAN app so it can be used on your Smartphone or tablet for voter contact.

## Printing Lists
What good are your lists if you can’t print them to make calls with or have a hard copy that notes can be made on so data entry can be done later? The first step to printing your lists is clicking the “Print” icon located in the “Task Bar” when at the “List View” page.

This takes you to the printing set up page here you will need to select options so Votebuilder know how you want your list printed. After this is done, Votebuilder creates a PDF file based on options selected on the print set up page that can be downloaded and printed. To read a PDF file your computer will need a copy of Adobe Reader which can be obtained for free at: [http://get.adobe.com/reader/]
Report Format: This selects what information about a voter appears on the printed list as well as what contact responses you have on the list. There are two default formats that should satisfy most of your needs; these are titled “Walk Report” and “Phone Report”. If you need other information on your printed list, you will have to create a custom “Report Format” from the admin panel on the main page or request a new format that better fits your needs from your VAN Committee administrator.
Script: The script you select determines what Survey Question and Activist Code responses appear on your printed lists. These must be created from the admin panel on the Main Menu page. You are not required to select a script and leaving the script blank will just leave you with white space on the right-side of the printout of your list.

Contacted How: Simply choose phone or walk for how they are contacted.

Title: This is the name you want to give your list. Your Title should be descriptive so you can find your list latter.

Sort Order: This section is where you decide how you want your printed list sorted.

Other Options: Below “Sort Order” we will find several options. The most important of these are “Print People” for obvious reason and “Print Footer”. “Print Footer” should always be checked since list number is usually needed to do data entry, and if your list doesn’t have a number it will be very difficult for you to enter the data you collected into Votebuilder.

After selecting your printing options, click “Next” in the lower right-hand corner of the set up page and Votebuilder will take you to a new page telling you that your PDF has been created. You can pick up your list for printing by either following the link from this page that says “My PDF Files” or going back to the Main Menu and clicking on “My PDF Files” found in the Message Center.
This will take you to the “PDF Print Jobs” section for Votebuilder. The list you set up to be printed should now be located here and you can choose to download or delete it by clicking the respective links to the right of the list title. After downloading the list, you need to open it with your PDF reader and print the list as you would with any other file.

**Tips:**

- Name your files something that makes it easy to find.
- Delete lists that are no longer needed to avoid clutter.
- Once you have downloaded your list, the PDF can easily be shared with others through email or other file sharing methods.
- Take a look at how your PDF list looks before you print it to make sure everything is set up the way you want it during the print set up process before actually printing it.

**Using Turf Cutter and Printing Walk Lists**

Creating walking packets for canvassing in the past was often a tedious process since you had to acquire maps of the area you planned on walking, and then match the walk list you had to the map street by street. Luckily, Votebuilder has a built in Turf Cutter that will allow you to divide up a large walking target into several smaller walking turfs; once these turfs are created...
Votebuilder will automatically create a walking map for each turf and walking lists that only contain people inside that turf.

To access the “Turf Cutter” click on the “Cut Turf” icon located in the “Task Bar” on the “List View” page.

"Turf Cutter" can also be accessed from the Main Menu in the "My List" section by clicking on "Cut New Turf".

You will then be taken to a map of where the voters on your list indicated by gray dots. You may zoom in and out using the +/- boxes on the left hand side. You can drag the map to view different locations by clicking on the map while holding down the left mouse button and dragging it to a different location. The upper right-hand corner the map displays a Legend where you can view how many people/houses have not been assigned to turf yet, people that are in your current turf, and people that are in created turfs.
To create turf you basically click on the map and begin drawing lines around the voters you want to include in that turf. Below is a step by step of how to do this.

1. To cut turf you will need to single click on some point on the to begin
2. From here you will click on another point on the map to create a line
3. You will keep clicking on points on the map to until you have encompassed all the voters you wish to include in that particular turf.
4. To finish creating the turf click inside the box your original starting point created to enclose the area.
5. To create another turf, single click on the map again to set a new start point and follow the same process for the first turf
6. Repeat above steps until all desired voters have been assigned a turf

Tips:
- The general rule is that a single canvasser can knock around 20 hours per hour. So make your turfs a size that make sense for how many hours you or plan to walk. For example you and 2 other volunteers walking for 4 hours would need 3 turfs each with around 80-100 doors in them.
- When cutting turf pay attention in major road and geography. It isn’t a good idea to have a canvasser cross back and forth over major roads or walk a turf that is to spread out.
- While cutting turf you can undo your last click by click “undo” located along the top of the map.
• You may also delete a created turf by clicking the trash can icon next to the turf.

When finished you should have something that looks like this

Now you need to save the all of the turfs you created so they may be printed later. Select “Save and Finish” from the upper right hand corner of the page. This will ask you to save your turfs to a folder, I recommend creating a separate folder for walk turfs so that they are easier to find.
When viewing a set of turfs in a folder there several options for printing, editing, and refreshing turf you should be aware of.

**Print Region** – Selecting this will take you to the print set up page for all the turfs in the map region. This is the most common way to print a region with several turfs since it will give you all of the turfs and maps one easy to print PDF.

**Print an Individual Turf** – Clicking the name of an individual turf will take you to the print set up page for that individual turf.

**Refresh** – If your turf is based on a saved search, clicking refresh will rerun those criteria and remove anyone in that turf who no longer meets the criteria to be included into the list. This is helpful when canvassing an area multiple times, if your saved search target removes voters you have talked to already, saving the trouble of having to re-cut the turf each time you are going to walk that area.

Walk turf can also be managed/printed by clicking on the "Manage Turf" icon on the Main Menu page and then clicking on "My Turfs".
This section allows you to print, edit and refresh previously created turf using the icons on the right-hand side.

The icons for the **Turf Region Options** are as follows from left to right: "Refresh turf" - refreshes all turf in turf region; "Cut or edit turf polygons" - allows you to edit previously created turfs in region to add or remove people from them; "Edit Region" - allows you to edit the list your turf is based off of; "Print Region" - takes to the print set up for all turfs in turf region.

The icons for the **Individual Turf Options** are as follows from left to right: "Generate List Number" - used for distributing lists to volunteers using MiniVAN; "Send to MiniVAN user" - send list to your MiniVAN account; "Edit Turf" - allows you to edit the list your turf is based off of; "Print Turf" - takes to the print set up for the individual turf.

"Manage Turf" also gives you options in the "Quick Actions" section to print/generate list numbers for multiple turfs without having to do it for all of them, which can be useful. To do this simply click on the box next to the turf you want to perform quick actions for and then select what you would like to do from the "Quick Actions" pull down menu.
Once you have selected whether you want to print the entire turf region or just a single turf, you will be taken to the print set up screen. This is very similar to process of printing phone lists as you select a Report Format, Script(optional), Contacted How, Title, and Sort Orders for the print our but there are some small differences. When “Walk” is selected for “Contacted How” you should notice you are given a couple of new options below the Sort Order section these include:

**Map Printing Options**

- **Print Map** (default) – Prints map with streets and dots representing where the people on your list live
- **Print Map without People**– Prints map with streets but no dots indicating where people on your list live
- **Do not Print Map** – No map included

**Driving Directions**

- **None** (Default)
- **To Turf** – Selecting this will allow you to enter a starting address and driving directions to each turf in the packet will be created and printed
After selecting your printing options click “Next” in the lower right-hand corner of the set up page and Votebuilder will take you to a new page telling you that your PDF has been created. You can pick up your list for printing by either following the link from this page that says “My PDF Files” or going back to the Main Menu and clicking on “My PDF Files” found in the Message Center.
Data Entry

Entering data you have collected into Votebuilder is vital for making it a useful tool for yourself as well as others. For example if you are a house candidate entering the responses you get from canvassing or phone banking will prevent you from talking to the same voter twice saving you time, and will save you money if you decide to send out a mail piece since you can easily exclude those who have already said they will or won’t support you. Additionally since the data in Votebuilder is there indefinitely, the next time you run you will be able to use those past Survey Question responses to create a better targets of who might need persuading to vote for you and who will likely be voting for you, but might need a reminder to vote on Election Day. Data entry is also critical for Town and County Committees since regularly updating who is a member of your local committee makes it much simpler to pull calling or mailing lists out of Votebuilder to remind them of regular meetings, Justice of the Peace caucuses, or important events.

Quick Mark

To enter data using Quick Mark click the “Quick Mark” icon found on the Main Menu.

You will now need to set up what information is being entered. First, select what you will be entering i.e. Survey Question, Activist Codes, Marking Bad Addresses and hit “Next”.
If you selected either "Add a Survey Response" or "Add a Activist Code" you will be taken to a screen where you need to select which Survey Question or Activist Code you want to apply, what date you want to apply as the date canvassed, who the canvasser for the data is (typically this is your name), and where the information came from i.e. walk, phone, event, etc.

You will now be taken to a Quick Lookup screen. Use the fields available to search for the voter you want to enter data for, keeping in mind the hints for Quick Lookup (Found on page 16). When you find the voter you were looking for on the left hand side next to their name you will see either a check box or pull down menu to enter data with.
After you have entered data for a person simply enter the next voter's information into the search fields and click “Save/Search” to both commit your data entry and look for the next person on your list.

**Grid View**

*Grid View* is often the quickest way to enter data from previously created lists, but requires a script to be associated with. To access *Grid View* click on the “Grid View” icon found on the “Main Menu”. 
You will now need to enter the list number that can be found on your paper list. This is found in the bottom left-hand corner and you should keep in mind that **these numbers are only good for 30 days so you need to do your data entry before your list number expires**. You can also use **Grid View** to enter data for your current list in Votebuilder or enter data associated with a script using Quick Look up to find specific voters.

Once you have selected a list you will be taken to a set up screen where you will need to select the script used, the canvasser, the date canvassed, how voters were contacted, and the sort orders for your lists. If you are using the list number option everything but the “**Canvasser**” should be pre-selected for you based on what these fields were when you created the list. After filling in those fields click “**Next**” begin data entry.
You should now be at a screen with rows for each voter and columns for the data to be entered. To enter data for a voter select the relevant responses from the pull down menus or click the check boxes for Activist Codes.

There are several things to keep in mind while using Grid View for data entry:

- It is always a good idea to order your printed pages numerically by the page number found at the bottom of the page since the voters in Grid View data entry are in that same order.
- The web page display 20 records whereas your paper list may have more or less records per page so the printed pages will not line up perfectly with the web page.
- To commit data that has been entered you must click on one the save icons (Save or Save/Next) in the upper right-hand corner.
- You can skip forward pages to a specific voter by using the voters VAN ID (typically found next to their barcode) and entering it in the upper left-hand corner text box called “VANID” and clicking “Go”. **Remember to save before doing this.** This is particularly helpful if your list is missing pages or they are out of order.
- You do not need to manually enter all of your “Not Homes” since there is a button at the bottom that marks all remaining people on the page “Not Home”

<table>
<thead>
<tr>
<th>281200</th>
<th>Freitas Jr, John J</th>
<th>5 Summer St</th>
<th>Burlington</th>
<th>SD</th>
<th>57</th>
<th>(8)</th>
</tr>
</thead>
</table>

20 Voters · 1 Page

Mark Remaining Not Home
**Glossary**

**Activist Code**: User created object. Used to track constituency groups, party committee members, and other types of yes/no mutually exclusive information.

**Breadcrumbs**: Navigation panel that allows you to see where you are in Votebuilder and travel back to your previous page.

**Counts and Crosstabs**: Allows you to create quick reports of Votebuilder data by creating crosstabs of specified fields

**Grid View**: Grid View is used to enter multiple Survey Questions and Activists Code responses associated with a list created in Votebuilder. This is by far the most common way to enter in canvassing data if a bar code scanner is not available because it is quick and does not require much set up. It should be noted that to use Grid View your printed list cannot be more than 30 days old and you must have a script associated with your list.

**Likely Party**: Value assigned to voters based on their past Survey Question responses, Activist Codes, and Presidential Primary voting history.

**MyCampaign**: The part of Votebuilder that contains user added records for their volunteers or local activists.

**My Voters**: The part of Votebuilder that contains information on all registered voters in the state. Collected from the VT Secretary of State and past campaigns.

**Party Points**: Points assigned to each voter based on Survey Question responses. Party Points help create the Likely Party score

**Quick Lookup**: Quick Look Up is how you access a voter's record by searching on a name, part of a name, address, or some combination thereof

**Quick Mark**: Quick Mark is used when you have a single Survey Question or Activist Code that needs applied to multiple people. After some set up data entry is done my using Quick Lookup to find the individual you want to flag with a Survey Question or Activist Code. This is often used to apply an Activist Code to volunteers who have signed up at an event or apply Survey Questions responses to ad hoc lists of supporters.

**Report Format**: User created object. Tells Votebuilder what information to display and how to arrange it on calling and walking sheets.

**Scripts**: User created object. A combination of text, Survey Questions, and Activist Codes that can be displayed on walking/calling lists or on the Virtual Phone Bank calling page
**Survey Question:** User created object. Used to track voters or volunteers responses to a multi choice questions

**Turf Cutter:** Tool in Votebuilder that allows the user to view a map of the voters in their list, draw lines around groups of voters to place them in “turfs”, save those turfs and print them out.

**Voter Profile/Record:** Accessed through Quick Lookup by clicking on a voter’s name after successfully finding them during a search. Contains all the information we have on the voter in Votebuilder such as contact info, polling places, House Districts, and contact history.

**Voting Town:** The larger Vermont Town line that acts as a voting district. A voting town may contain several towns and villages.