THE OFFICIAL VANUAL

The official guide to navigating voter and volunteer data using VAN – every organizer's favorite campaign technology.

WWW.NGPVAN.COM

⚙ngpvan

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WELCOME

Welcome to the VAN. You may also know it as Votebuilder or SmartVAN, but no matter the name, everyone in the political campaign world knows it as the gold standard in political organizing technology. VAN is built and scaled to manage the largest and most sophisticated organizing campaigns in history. Every election cycle, thousands of Democratic campaigns up and down the ballot use VAN to contact hundreds of millions of voters.

Now that you've got one of the most powerful tools available to progressive campaigns in your hands, this simple guide is here to make sure you're getting the most out of it. We cover the most common features campaigns use, but it's not exhaustive - we're always coming up with new ideas to make organizers' jobs easier. Start here, and watch the NGP VAN blog for other product announcements and guides to see even more of what we can do for you.

"IF ITS NOT IN VAN, *IT DOESN'T EXIST.*"
- ANCIENT CAMPAIGN PROVERB

LOGGING IN/OUT

In order to log in to VAN, you'll need to have a user account created for you. For most political campaigns, you should contact your state party for access, but feel free to get in touch with us directly if you have any questions about getting set up. Once your account has been created, you'll receive an email with prompts and a link to create your account. You'll need to:

CREATE AN ACTIONID
Your ActionID allows you to log in to VAN for any campaign you have access to with the same information, rather than creating separate user names and passwords for each one. Your Action ID is yours for life, so we recommend using a personal email address when you create it.


SET UP 2-STEP VERIFICATION
For security purposes, you'll also need to create a PIN to use when you log in. You'll be prompted to type the letters that correspond with the numbers on screen.

NAVIGATING VAN

Once you have logged into VAN, you'll see the **Main Menu**, a homepage with multiple sub-menus that will take you wherever you need to go within the VAN. On the left side of the screen is the quick-navigation sidebar, which is available from any page in VAN, allowing you to navigate between pages quickly and without returning to the Main Menu every time.
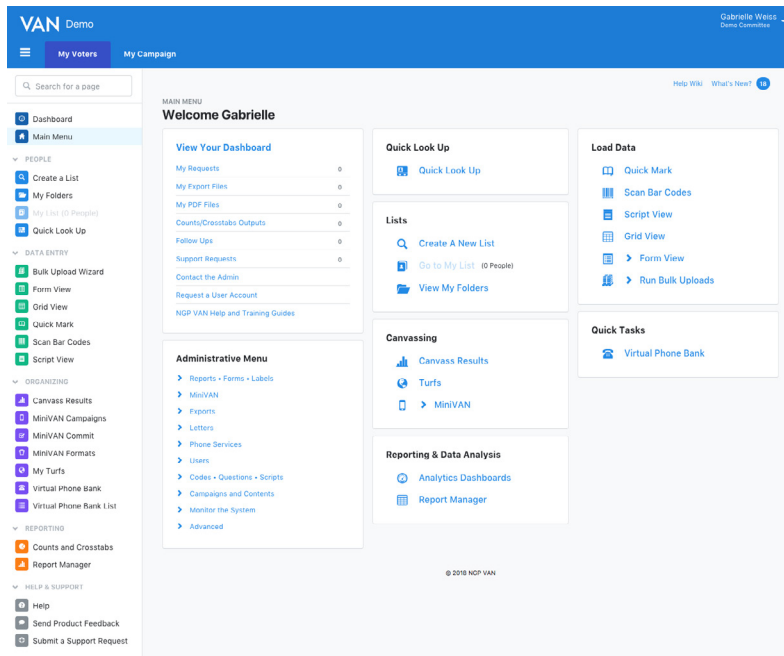
At the top-right corner of the screen, you'll see the account holder's name and the name of the VAN committee that you are currently working in. Click here to reveal a drop-down menu of account options, including updating your user profile, switching committees, and logging out of your account. From this menu you can also access the VAN Help Docs page which contains more in-depth documents on using both basic and advanced VAN features.
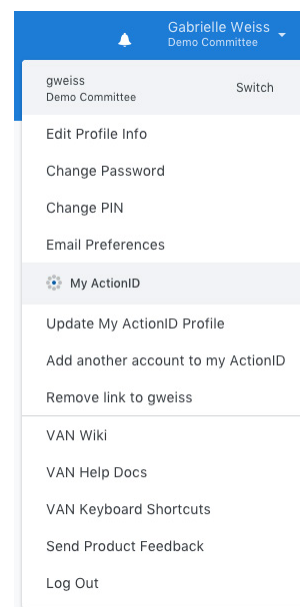
From the **Main Menu**, you can navigate to the **Dashboard** either from the top of the sidebar, or the **View Your Dashboard** button at the top-left corner. The **Dashboard** populates with data as your campaign grows, providing a quick snapshot of organizing progress. You'll see Phone Bank stats, updates on Lists you're following, recent and upcoming Events (only in My Campaign), and shortcuts to some of the most-used tools in VAN: list creation, data entry, and canvass results.

MY VOTERS + MY CAMPAIGN

On the top-left corner of the screen is the logo of your VAN instance (for Democratic party campaigns, you'll see the Votebuilder logo), and the tabs to switch between the **My Voters** and **My Members** databases.
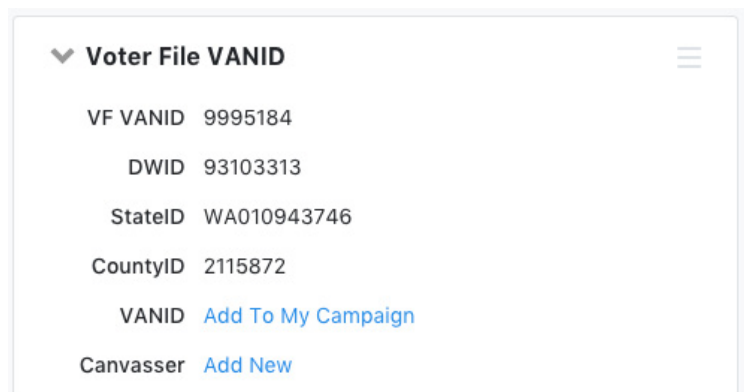
My Voters houses the voterfile for your state, and includes a wide variety of information about each registered voter, including contact information, demographic information, voting history, and that voter's contact history. The majority of campaign work happens on the **My Voters** side of VAN, where organizers can create lists for phone banking, canvassing, and mail programs.

My Campaign is the volunteer management side of VAN, where you will track the relationships that you build with your supporters. By default the **My Campaign** database is empty, and profiles are added as volunteers and activists are recruited. The main menu of **My Campaign** is nearly identical to that of **My Voters**, with a few additions that are only available on the volunteer side (such as the **Events Menu**). Most basic functions, like **Quick Look Up** and **Create A List** exist in both sides.
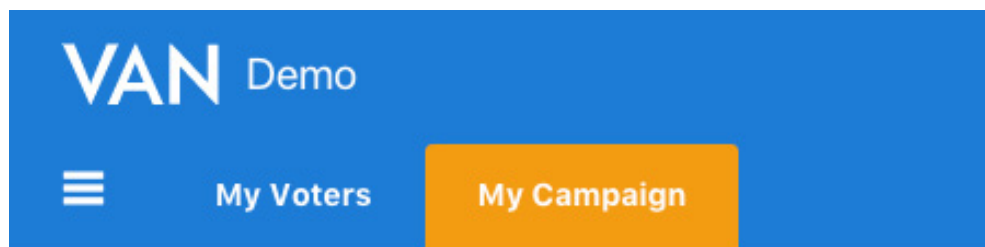
ADDING VOTERS TO MY CAMPAIGN
Every campaign staff and volunteer should have a record in both **My Voters** and **My Campaign**. It is very simple to copy a record over from **My Voters** to **My Campaign**; simply view that voter's profile, and under the **Voter File VANID** menu, click "Add to My Campaign." That user will now appear in your volunteer database.


Voter File VANID

VF VANID   9995184

DWID   93103313

StateID   WA010943746

CountyID   2115872

VANID   Add To My Campaign

Canvasser   Add New

FINDING VOTER RECORDS

VAN gives organizers the ability to quickly search through thousands of voter records and identify the correct profiles

USE **Quick Look Up**
Quick Look Up is the fastest way to locate an individual voter record. Navigate there from the **Main Menu.**

Quick Look Up

🖳 Quick Look Up
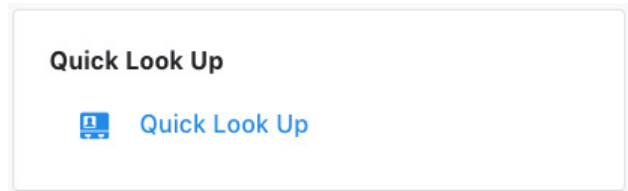
SEARCH WITH KNOWN INFORMATION
You can search for a voter profile with any contact information you have for a voter, such as name and phone number, or specific database identifiers such as their VANID.

EDIT VOTER PROFILE
Once you have found the voter profile that you are looking for, click on their name to view and edit their information. From this screen, you can update contact information, apply **Survey Responses** and **Activist Codes**, view contact and volunteer history, and more. From the final **Actions** panel, internal changes to the user account can be generated, such as merging duplicate profiles or creating a VAN user account.

CREATING LISTS

Creating a list of voters is the first step to running a canvass or phone bank. From the Lists tab on the homepage, you can navigate to either creating a new list, returning to a previous list, or accessing a list that has been saved into a folder.

SELECT **Create A New List**
Create a new list is found on the menu of both **My Voters** and **My Campaign**.

Lists

Q   Create A New List

🔲 Go to My List   (4 People)

📁 View My Folders
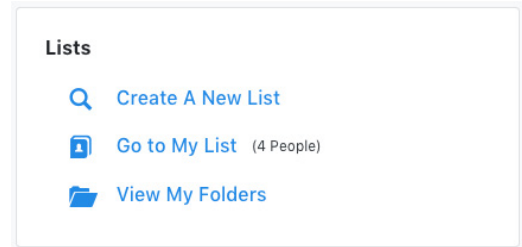
SELECT YOUR DESIRED SEARCH CRITERIA
From the Create A New Search page, you can search based on a wide variety of data point, such as location (under the **Addresses** tab, you can select to search by state, city, zip code, address, etc.), **Home District** (County, State or Congressional), demographic information, and profile characteristics such as having a listed phone number or email address. When pullings lists for canvassing or phone banking, several other important fields to keep in mind are **Canvass Status** and **Survey Questions**. These tools allow organizers to pull (or exclude) voters from lists based on their previous contact history - selecting only voters who have answered "yes" to a Survey Question, or excluding those who have already been called recently, for instance.
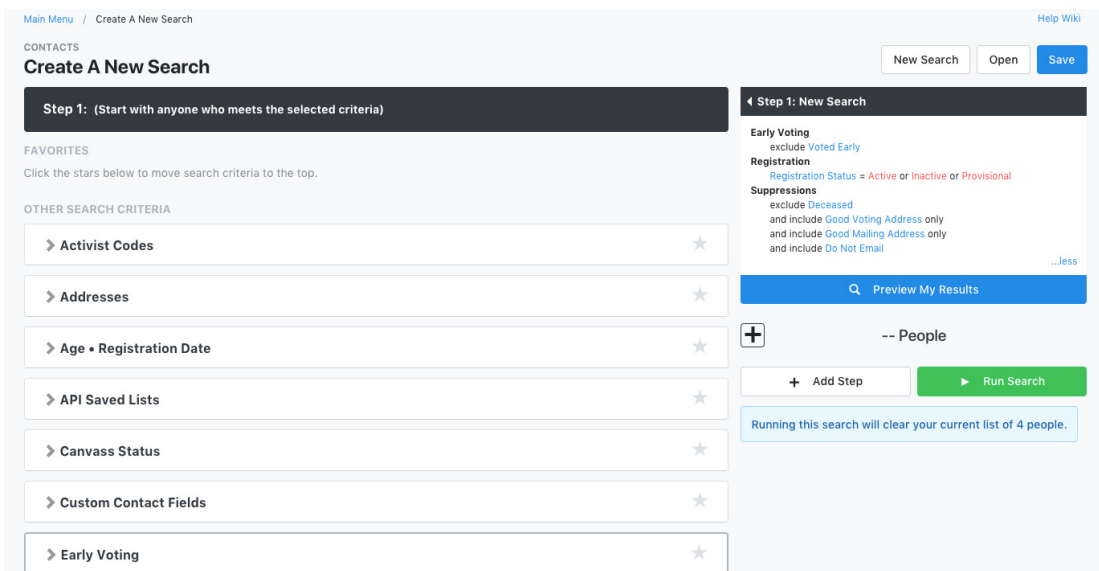
SELECTING MULTIPLE SEARCH TERMS

Many fields on the **Create A List Page** include the ability to select multiple options from the list. These fields can be identified because their names appear in blue text, rather than black (as seen above). To use this feature, rather than selecting the drop-down menu, click on the blue label to access the select multiple menu.

TRACK YOUR LIST

As you choose qualities to search by, they will appear in the summary on the right-hand side of the screen, allowing you to track the qualities that you are adding to the list.

RUN THE SEARCH

Clicking the **Preview My Results** button will show you a count of people on the list without fully running the search. The plus sign next to the number displayed expands the preview to show number of phones, doors, and mailboxes present on the list as well. When you are satisfied with the list you have pulled, the green **Run Search** button will process the query and return your results.

EDIT THE SEARCH, IF NECESSARY.

In addition to adjusting the search terms of the list, organizers can further edit the query by using the **Add Step** button. The **Add Step** button uses the previously pulled list as a starting point, and performs new commands to add or remove voters from it based on a new set of criteria. Hovering your cursor over each option will reveal details on what actions will be performed by each command.

⌄ Home Districts

Search for Districts that have been applied to a person's physical Home Address.

Select multiple | State | Florida

County

Congressional

State Senate

State House

◄ Step 1: New Search

Early Voting
exclude Voted Early
Phones
Phone Types = Cell or Home or Main or Work
and include Likely Cell Phone Exchanges
Districts
County = Okeechobee
Registration
Registration Status = Active or Inactive or Provisional
Suppressions
exclude Deceased
and include Good Voting Address only
and include Good Mailing Address only
and include Do Not Email

...less

🔍 **Preview My Results**

➕ 14,814 People

+ Add Step | ▶ Run Search

Running this search will clear your current list of 0 people.

🔍 Preview My Results

➕ 14,814 People

+ Add Step | ▶ Run Search

+ Add People   clear your current list of 0

− Remove People

▼ Narrow People

⚃ Narrow by Sample

🏠 Householding

VIEW THE LIST
Once VAN has run the search, the **My List** page will display a summary of the list, a row of icons with various options for using the list, and a sample of the list to allow you to spot check the data.

The icons at the top of the screen of the **My List** folder demonstrate the most common actions that organizers will use lists for: Mailing (Letters, Labels), Phone Banking (Print, Calls), Canvassing (MiniVAN, Cut Turf, Map), Data Entry (Grid, Script, Form, Bulk Apply), and moving data to other sources (Export). Hovering your cursor over an icon will reveal more information about each action. To rearrange the icons, simply drag and drop them to move your most commonly used to the front.

LIST
Save My List

- ⦿ Saved List (Fixed set of people)
- ○ Saved Search (Dynamic set of search criteria)

- ⦿ New List
- ○ Replace an old List

Folder* [⌄] ☐

New Folder

Name* [   ]

Description [   ]

Save

SAVING LISTS

SELECT **Save List As** *FROM THE TOP-RIGHT CORNER OF THE* **My List** *PAGE.*
VAN allows the option to save a list either as a fixed set of people, or as a dynamic search (the latter means your criteria is saved, and can be updated as voter profile information changes).

CREATE A FOLDER TO HOUSE THE LIST.
Lists can be saved into existing folders, or a new folder can be created from this screen. These folders can always be accessed from the **Lists** window of the **Main Menu**.

Lists

🔍 Create A New List

📇 Go to My List (4 People)

📁 View My Folders

FOLDERS
Edit Folder Gabby's Demo Turfs

Name* [Gabby's Demo Turfs]

☐ Allow other users to save into this folder

☐ Allow the API to save into this folder

Description [   ]

Created By Weiss, Gabrielle (1/17/18)

Status ⦿ Active   ○ Inactive

Delete   Save

SHARING LISTS

VAN allows users to share lists with each other, so that, for instance, turfs created by one organizer can be viewed and printed by another. To adjust a list's sharing settings:

VIEW THE FOLDER
From the **Main Menu**, select **View My Folders** in the **Lists** panel. Open the desired folder and click the **Edit Folder** button.

ADD USER ACCESS
From the **Edit Folder** page, access to the fold-er can be granted to or removed from other user accounts in the VAN. Simply select the user(s) who need access, and add them to the appropriate column.

User Access

Committee [Demo Committee]

Users with Access   Users without Access

[   ]   [1, NOU
                          ApiUser, SLDemo
                          auto, tester
                          autotest, tester
                          Hu, Yuan
                          hu, Yuan
                          Hu, Yuan
                          Ogin, Todd
                          Stephenson, Michelle
                          Test, Eric   ]

Remove   Add

SURVEY QUESTIONS + ACTIVIST CODES

Survey Questions and Activist Codes are a critical part of voter contact, enabling organizers to 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, so this guide will focus on creating Survey Questions, since they are slightly more complicated.

SELECT **Survey Questions** *OR* **Activist Codes** *FROM THE* **Codes-Questions-Scripts drop-down**
From this screen, you can view and edit existing Survey Questions and Activist Codes

SELECT **Create New Survey Question** *OR* **Create New Activist Code** *FROM THE TOP-RIGHT CORNER OF THE SCREEN*

ENTER QUESTION/CODE TEXT AND NAME DETAILS
Once you have filled in the text and details, click the "save" button.
For Activist Codes, this is all you need to do.

Cycle*	2018
Type*	Candidate
Long Name*	Demo Candidate ID
Medium Name*	Demo ID
Short Name*	ID
Question*	Can we count on your vote for Demo Candidate in the upcoming election?

FOR SURVEY QUESTIONS: ENTER RESPONSES
You can enter as many responses to a Survey Question as you need - from a simple yes or no, to a 1-5 Candidate ID scale.

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	

Once you have created Survey Questions and Activist Codes, put them into a Script and you'll be ready to start contacting voters for your campaign. Building a script is an easy process of assembling various elements.

TYPE TEXT ELEMENTS
On the **Add Script Element** panel, type your desired script introduction into the **Text** field. When satisfied, click **Add**, and a preview of that text will populate in the **Linear Script Preview Panel**.

INSERT DYNAMIC SCRIPT ELEMENTS
To insert a Survey Question, Activist Code, or Event invitation into a script, select them from the drop down menus, and click **Add**. The element will populate in the script preview.

EDIT OR ADJUST AS NECESSARY
Script elements can be edited or deleted from the preview panel using the buttons to the right, and rearranged by clicking and dragging the buttons to the left.

CHOOSE CANVASS RESULT OPTIONS
Before saving, 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.

Linear Script Preview

≡	1	Text	Hi, is [voter name] available?	Delete	Edit
≡	2	Text	My name is [name], and I'm calling with a demo campaign.	Delete	Edit
≡	3	Survey Question: Animal Treatment	Do you believe that the treatment of animals on farms and in factories is acceptable?	Delete	

Yes

No

Unsure

Don't Care

Save

Add Script Element

Text [   ] Add

Survey Question [   ] Add

Activist Code [   ] Add

Volunteer Activity [   ] Add

Event Add   Select Date, Event, Role, and Location

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

VIRTUAL PHONE BANK

SELECT THE **Calls** *OPTION FROM* **My List**
From the menu, select "Set up Virtual Phone Bank List." Campaigns may also choose to enable the options to set up predictive dialer campaigns through VAN or our partner, CallFire.
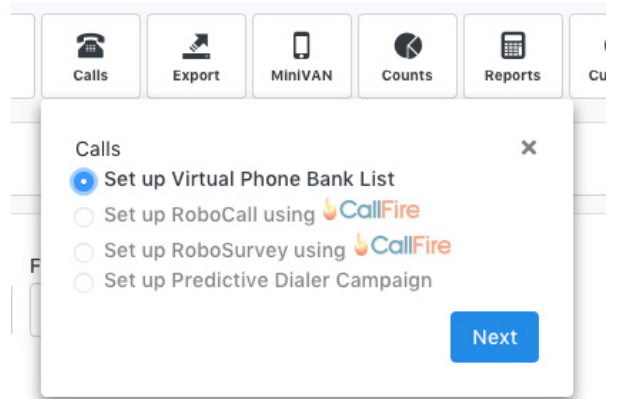
CHOOSE PHONEBANK SETTINGS
Clicking next will navigate the user to the **Virtual Phone Bank Details** Page, where the majority of the phone bank is set up. First, the organizer will need to name the phonebank, choose a script, and pick a start and end date for the phonebank. The phone bank will only be available to organizers and volunteers on the user end during this window.

From this screen, organizers can also choose to include the **Event Scheduler** in their phone scripts (for Virtual Phone Banks). Simply check the "Include Event Scheduler" box, and select the date range and event types that will be shown to callers.

CHOOSE SHARING SETTINGS
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.

CHOOSE USER DISPLAY SETTINGS
On the Display Settings panel on the right side of the screen, organizers can customize the display screen that volunteers will see as they phonebank. Users can choose which contact information will be displayed and will be editable by volunteers.

PUBLISH AND CONFIRM SETTINGS
After finalizing display preferences, clicking next will lead to a final confirmation screen - the same one that you'll see if you come back to edit the phone bank or send it to a second round of calls once it has been launched. On this screen, the Virtual Phone Bank Code and link to the OpenVPB (if one was published) are displayed in the top right corner.

SHARE THE PHONEBANK WITH OTHER USERS
At the bottom of the screen, the User Access Panel is where you can control who will have access to make calls into the phonebank. Select the users you want to give access, and add them to the correct column.

✓ Sharing

Open Virtual Phone Bank (openvpb.com) ● Publish to openvpb.com ○ Not Visible on openvpb.com

Display Settings [Save & Preview]

Customize the layout and information displayed on your Virtual Phone Bank.

✓ Basic Demographics

Select All | Deselect All

☑ Age
☐ Party
☑ Source File Sex

✓ Contact & Location Information

Enable read-only information shown for each contact on the list.

○ Display Above the Script
● Display Below the Script

Select All | Deselect All

☐ Congressional
☐ County
☐ Date of Reg
☐ Personal Email
☐ Precinct
☑ Preferred Email
☑ Preferred Phone

User Access (Now Optional)

Committee [Demo Committee]

Users with access

Users without access

1, NOU
ApiUser, SLDemo
auto, tester
autotest, tester
Hu, Yuan
hu, Yuan
Hu, Yuan
Ogin, Todd
Stephenson, Michelle
Test, Eric

[Remove] [Add]

PREVIEW AND SAVE THE PHONEBANK
Once you are happy with all of the phonebank settings, clicking the "Save and Preview" button in the **Display Settings** panel will create a preview of what the phone bank will look like from the user end for you to review.
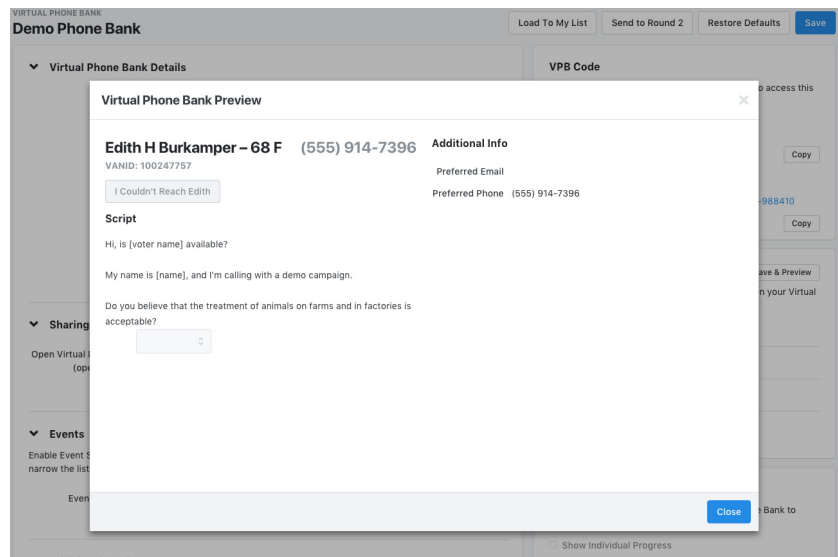
MAKE ANY NEEDED ADDITIONAL EDITS TO THE PHONEBANK
The back end of your phone bank can be accessed at any time through the **Administrative Menu** > **Phone Services** > **Virtual Phone Bank**. To make edits to the phone bank, simply click on the name from this page.

MAKE PHONE CALLS
The user end can be found on the **Quick Tasks** pane on the homepage, for anyone who has been given access. Once the phone bank has been saved, the Sharing panel will be displayed in the top-right corner. The VPB code can be given to any phone banker with a VAN user account to allow them to access the phonebank. If the phone bank was published as an Open-VPB, the link will need to be emailed to volunteers.

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

Both OpenVPB and VAN's regular Virtual Phone Bank feature are mobile responsive, and volunteers can make calls from any device. As shown here, 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 her device.
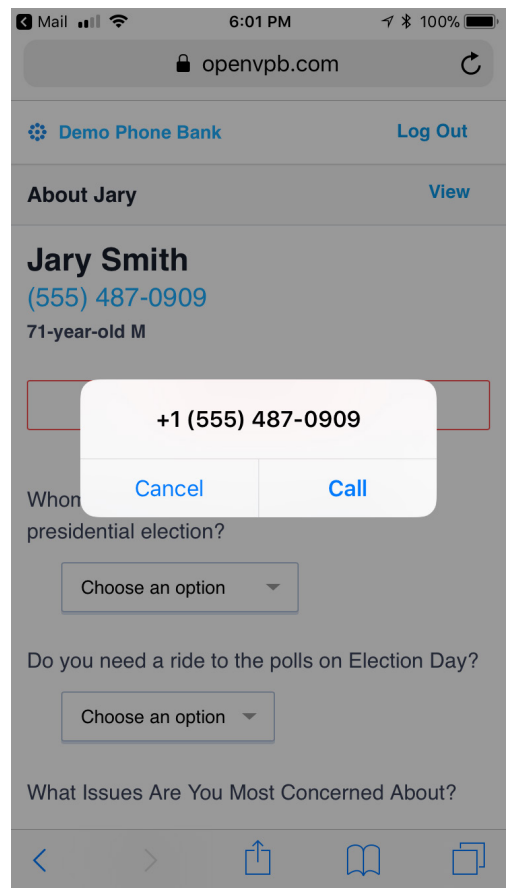
MONITOR PHONEBANK PROGRESS
To track phone bank progress and results, access the back end of the phone bank as described above, and click on the "Report" button next to the name. Reports can be sorted by Canvass Results, Script Results, or both, using the tabs above.

			Canvass and Script Results	Canvass Results	Script Results									
						ID					Ride		Healthcare	
Canvasser	Total Attempts	1 - Strong Hillary	2 - Lean Hillary	3 - Undecided	4 - Lean Republican	5-Strong Republican	Unknown	Yes	No	Unsure	Unknown	Yes	No
Weiss, Gabrielle	18	3	2	3	0	1	9	2	6	0	10	4	14
Total Attempts	18	3	2	3	0	1	9	2	6	0	10	4	14

PAPER DIAL CAMPAIGN

SELECT THE **Print** *OPTION FROM* **My List**

SELECT THE APPROPRIATE REPORT FORMAT
(VAN is populated with a default Calling List template, but campaigns can also create custom forms to fit their own needs).

CUSTOMIZE YOUR DOCUMENT
After selecting the Report Format, organizers will choose a variety of other customization options - adding the script, determining the sort order for the records that will be printed, and excluding people who have voted early.

SAVE AS A PDF
When all fields have been selected, clicking "Next" will generate a PDF call sheet file which can be accessed through **My PDF Files** on the **Homepage Message Center**.

CREATING A CANVASS

Canvasses are the backbone of a political campaign field program, which is why VAN makes it easy for organizers to get canvasses set up and volunteers out on doors quickly.

By the way, if you're tired of printing out paper canvass packets and doing tedious data entry, check out our free mobile canvassing app: MiniVAN. **MiniVAN is revolutionizing the canvassing process and putting the power of gold-standard campaign technology into the hands of anyone with a smartphone.** It saves organizers time, and is generally preferred over paper lists by volunteers who've used it. We'll cover MiniVAN canvasses in a separate manual - for now, **check it out here.**

FROM THE **My List** *PAGE, SELECT* **Cut Turf**
A map will populate, with black dots representing each voter record on your list.

CLICK THE SCREEN TO DROP PINS
To begin cutting the turf, click on the screen to drop a pin where you want to begin a turf. Click on the screen again to drop a second pin, creating a turf boundary between the two points, and continue dropping pins until you are happy with the turf size. As shown on the yellow turf below, doors that are included in a turf will be highlighted, and the **Selected** section of the Legend shows a count of the doors that will update as you select.

CUT ADDITIONAL TURFS
To close the turf, simply click on the first pin again. Your turf will be displayed on the color-coded legend, and can be edited at any time by clicking on it and dragging the pins. Repeat the process for as many turfs as you need.

ERASE OR UNDO IF NEEDED
The icons at the top of the screen are options to automatically cut turf, based on preference such as door count, undo last action, or erase all turfs.
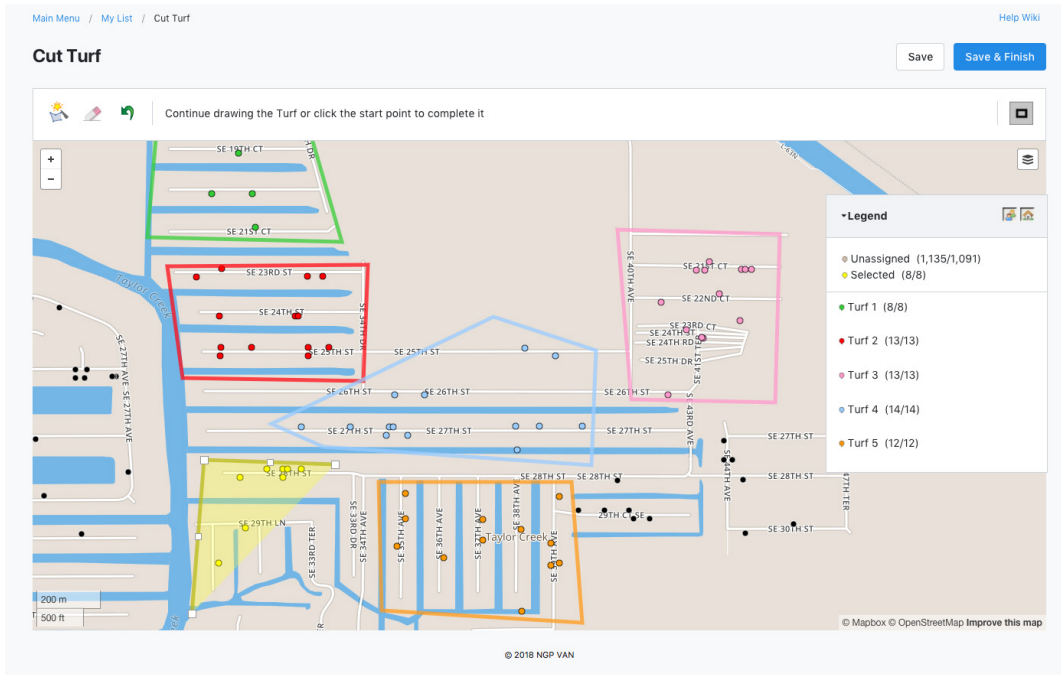
SAVE THE TURF
When satisfied with the turfs, hit **Save and Finish**. You will be prompted to select a destination folder, or create a new folder to house the turf.

PRINT THE TURF
Saved turf can be accessed by selecting the **Turfs** option the **Canvassing** panel of the **Main Menu**.

From the **Turfs** screen, select the desired turf or turfs (organizers can select multiple regions to print at once) and choose **Print** from the **Quick Actions** drop-down menu. This menu also houses options to export, send to MiniVAN, or generate list numbers.
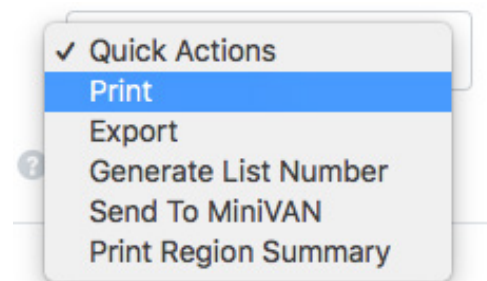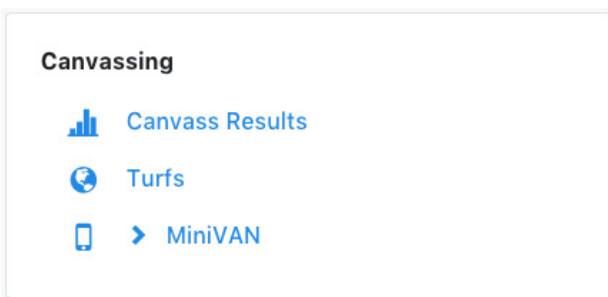
CHOOSE PRINT SETTINGS

The print settings screen will prompt
organizers to select the script that will be used for the canvass, choose the order that
records will displayed, and other settings for printing the map and list.

DOWNLOAD AND PRINT PDF

Once you have chosen settings and hit **Print**, you can access the PDF files through the
Message Center on the **Main Menu**. Simply download the file, print from your
computer, and it is ready to be assembled onto clipboards!

MONITOR THE CANVASS
After the data from the canvass has been entered, you can view the results on the **Canvass Results** page, found on the **Canvassing** panel of the **Main Menu** screen.

The **Group By** menu will change the first column of the report, allowing organizers to view results by county, district, team, canvasser, and more. Users also have the ability to filter based on date range, campaign, and input and contact types.

REPORT
Canvass Results by County

Export To Excel

Committee	Date From	Date To
Demo Committee	1/23/18	1/23/18

Input Type	Contact Type

Group By	Filter	Campaign

Refresh Results

County	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Okeechobee	8	44%	1	6%	0	0%	0	0%	9	50%	18
Total	8	44%	1	6%	0	0%	0	0%	9	50%	18

◦ngpvan

SCHEDULING AN EVENT

VAN allows organizers to easily track and manage volunteers as they sign up to attend events. The **My Campaign** main menu features an **Events** panel, where you can easily create a new event, view your campaign's event calendar, and access other event and participant data.

IN **My Campaign**, *CLICK* **Create New Event**
The command to create a new event can also be accessed through the calendar or event list pages.

SELECT EVENT TYPE
The type of event (such as canvass, phone bank, or house party) will determine the volunteer roles that attendees can sign up for. You can create new custom event types in the Administrative Menu, but VAN is populated with default options for the most common campaign events.

ENTER EVENT DETAILS
Go through each tab of the editing process, filling in the information on each tab. Organizers have the ability to set general information, number of shifts, create regularly recurring events, adjust the roles that attendees can sign up for, and choose sharing and publishing settings.

PUBLISH THE EVENT

When all information is set, select **Finish** to publish the event. Organizers can now begin adding attendees through phone bank or canvass scripts, online sign-up forms, or any data entry method.

EDIT AND MONITOR EVENT

Once the event is published, organizers can access the back end (to edit and track RSVPs) by selecting it from the **Calendar** or **Event List** (both accessible from the **Main Menu's Events** panel).

CLOSE OUT SHIFTS AFTER EVENT HAS OCCURRED

Aside from inviting, scheduling, and confirming attendees for events, it is important for organizers to "close out" an event after it has occured - changing each attendee's status to "Completed" or "No Show." To change participants' status, select "View All Participants" under "Participants Summary." To update an individual participant's status, simply select from the "Status" drop-down menu. To update multiple participants at once, select them by checking the boxes before their records, and then choosing Quick Actions > Update Status.
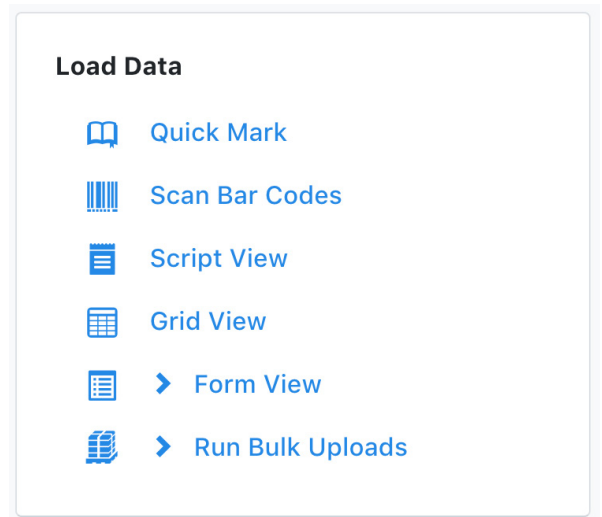
DATA ENTRY

Now that we've covered several of the ways that data can be pulled out of VAN, it's important not to forget the process for entering data into the system as well. Whether you're working with paper results from a phone bank or canvass, a paper event sign-in sheet, VAN makes data entry as simple as possible, with multiple options to fit your needs. All of the following options can be easily accessed on the **Load Data** panel on the **Main Menu** screen.

Load Data

📖 **Quick Mark**

▐▐▌ **Scan Bar Codes**

🗒 **Script View**

▦ **Grid View**
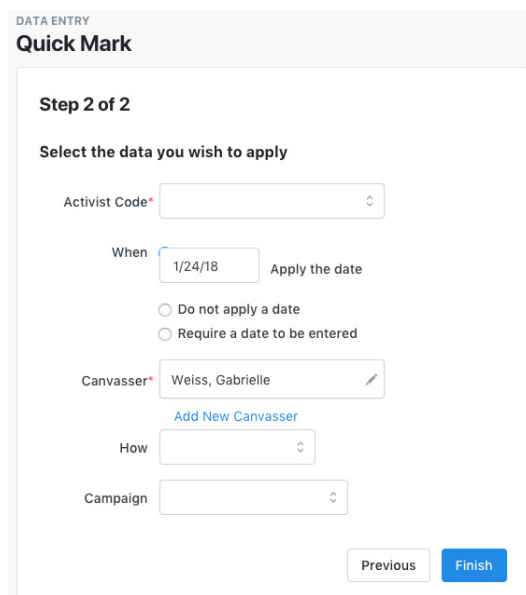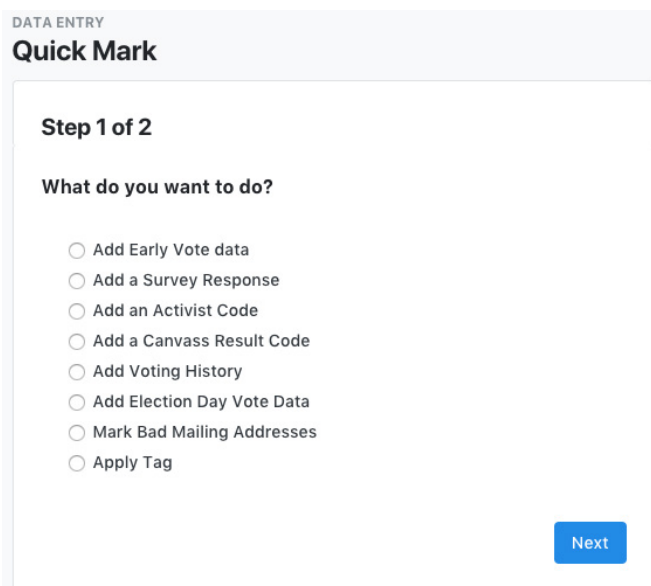
▤ ❯ **Form View**

▨ ❯ **Run Bulk Uploads**

QUICK MARK

Similar to the Quick Look Up tool, **Quick Mark** allows you to look up individual voters. Quick Mark then allows users to add data, such as Activist Codes, Survey Questions, and Vote History to voter profiles.

CHOOSE DATA TO APPLY
After entering **Quick Mark**, you will be prompted to choose the type of data that you want to apply to records. After selecting the category (such as activist code), you will be asked to select the specific code and information to apply to the records.

DATA ENTRY
Quick Mark

Step 1 of 2

What do you want to do?

○ Add Early Vote data
○ Add a Survey Response
○ Add an Activist Code
○ Add a Canvass Result Code
○ Add Voting History
○ Add Election Day Vote Data
○ Mark Bad Mailing Addresses
○ Apply Tag

Next

DATA ENTRY
Quick Mark

Step 2 of 2

Select the data you wish to apply

Activist Code* [⌄]

When [1/24/18] Apply the date
○ Do not apply a date
○ Require a date to be entered

Canvasser* [Weiss, Gabrielle   ✎]
Add New Canvasser

How [⌄]

Campaign [⌄]

Previous   Finish

SEARCH FOR RECORDS

Similarly to using the **Quick Look Up** function, organizers can search for a profile using whatever contact information that they have. Once the correct profile has been found, simply check the **Activist Code** box in front of the voter's name, and save.

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 a designated Script.

SELECT THE LIST
Grid view data entry is always based on an existing list - you can enter the list number for turfs and call lists, use the **My List** currently loaded in VAN, or use **Quick Look Up**. For printed turfs and call sheets, the list number can be found at the bottom of the page.

Demo Turfs Turf 03 · List 23168377-93962 · Page 1

ENTER RESPONSES ON GRID
Records will be displayed in the same order that they are on the printed lists, for easy entry. Enter Canvass Results like "Not Home," responses to Survey Questions, schedule events, or apply activist codes (whatever fields are included in the script applied to the list will be editable in Grid View).

MARK REMAINING AS NOT HOME
Typically, "Not Home" is the most common response for phone banks and canvasses, so rather than entering each individual instance into the grid, fill in all of the other responses, and then use the "Mark Remaining Not Home" button at the bottom left corner of the grid.

SAVE PROGRESS
Once the list has been entered, click the save icon to finish. All of the data will now be available to view in VAN.

Activist Code: Tags created by users, to track constituency groups.

Canvass Results: Voter contact disposition options for contact that did not result in a survey, including Not Home, Moved, Inaccessible, Deceased, etc.

Dashboard: An overview page for users, providing a snapshot of their organizing reports and shortcuts to commonly used features.

Grid View: A data entry form used to enter multiple Survey Question responses associated with a list created in VAN. This is the most common way to enter large amounts of canvassing or phone banking data.

Lists: User created groups of voters based on selected criteria such as geographic location or voting status. Lists are commonly assigned to a phone bank or canvass, and can also be saved, shared, and exported.

MiniVAN: NGP VAN's sophisticated mobile canvassing tool, allowing volunteers to receive turf and enter data on their smartphones rather than paper and clipboard packets.

My Campaign: The volunteer management side of VAN, that contains user-added records for volunteers and activists.

My Voters: The voterfile side of VAN, that houses records for every registered voter in the state. This data is collected from the Secretary of State, and past campaigns.

Quick Look Up: The tool for for quickly finding and accessing a voter's record by searching based on known contact information such as name, address, phone number, etc.

Quick Mark: A data entry tool for applying a single survey question or activist code to multiple records which are not associated with a list.

Scripts: Combinations of text, Survey Questions, Activist Codes, or Event invitations, created by users to be displayed on walking/calling lists or on VPB/MiniVAN pages.

Survey Question: Tags created by users to track voters' or volunteers' responses to multi-choice questions.

Turf: A group of voters from a list that have been cut into a map region for canvassing.

Turf Cutter: A tool that allows users to view a map of the distribution of voters in their list, draw lines around groups of voters to place them in turfs, and print those turfs.

User: An account with access to various functions of VAN. While each registered voter has a profile in VAN, only people who have been given accounts by a campaign have User profiles.

Virtual Phone Bank (VPB): A paperless phone banking system, in which callers view and enter information on computers while calling.

Voter Profile/Record: A unique record that contains all of the information that has been collected about each voter, including contact info, polling place, and contact history.