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Create a List

To begin, click on **Create A New List** from Main Menu

Welcome Amy

Account Requests0

Output Requests0

My Requests0

My Export Files0

My PDF Files0

Counts/Crosstabs Outputs0

Follow Up Calls0

Support Requests0

Contact the Admin

Request a User Account

NGP VAN Help and Training Guides

State Voices Training Site

Polling Locations

State Updates

▶ Reports • Forms • Labels

▶ MiniVAN

▶ Exports

▶ Letters • Emails

▶ Phone Services

▶ Users • Committees

▶ Codes • Questions • Scripts

▶ Campaigns and Contents

▶ Planned Communications

▶ National Reporting

▶ Monitor the System

Quick Look Up

Quick Look Up

Lists

Create A New List

Go to My List (1,276,223 People)

View My Folders

▶ Manage Turf

Analyze Data

▶ View Canvass Results

▶ View Counts and Crosstabs

▶ View National Reports

Load Data

Quick Mark

Scan Bar Codes

Script View

Grid View

▶ Form View

▶ Run Bulk Uploads

MiniVAN

Planned Communications

Planned CommunicationsPlanned Comm. Reports

Quick Tasks

## Create A New List

Choose your list criteria from this screen. This guide won't cover every option available, but will focus on the most commonly used criteria.

Create A New Search

New SearchOpenSave

Step 1: (Start with anyone who meets the selected criteria)

Favorites

Location

County

Media Market

Street Name

Street # FromTo☐ Odd Only☐ Even Only

City

Zip RadiusMiles From Zip Code

Zip FromTo

Age • Registration Date

Age FromTo

Birthday FromTo

To

Step 1: New Search

Registration

Registration Status = Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased

and include Good Voting Address only

and include Good Mailing Address only

and exclude Do Not Walk

and exclude Do Not Call

and include Likely Cell Phone Exchanges

...less

Preview My Results

+ -- People

+ Add Step

Run Search

Running this search will clear your current list of 1,276,223 people.

## Choose Search Criteria

Simply click the underlined link to choose more than one criteria.

### Create A New Search

New SearchOpenSave

Step 1: (Start with anyone who meets the selected criteria)

Favorites

Location

Select multiple

County

Media Market

Street Name

Street # From To ☐ Odd Only ☐ Even Only

City

Zip Radius Miles From Zip Code

Zip From To

Step 1: New Search

Registration

Registration Status • [Registered Active](#) or [Registered Inactive](#) or [Applicant](#)

Suppressions

exclude [Deceased](#)

and include [Good Voting Address](#) only

and include [Good Mailing Address](#) only

and exclude [Do Not Walk](#)

and exclude [Do Not Call](#)

and include [Likely Cell Phone Exchanges](#)

...less

Preview My Results

+ -- People

+ Add Step

Run Search

Running this search will clear your current list of 1,276,223 people.

Adding Favorites

To bring a search module to the top to the page, click the star icon. This feature allows you bring the most used search modules to the top and to order the search modules in any order you choose.

Step 1: (Start with anyone who meets the selected criteria)

Favorites

> Location

> Applicant Status

> Addresses

Other Search Criteria

> Activist Codes

> Address Types

> Age • Registration Date

> Blast Emails

Step 1: New Search

Registration

Registration Status = Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased and include Good Voting Address only and include Good Mailing Address only and exclude Do Not Walk and exclude Do Not Call and include Likely Cell Phone Exchanges

Preview My Results

+ -- People

+ Add Step

Run Search

Running this search will clear your current list of 1,276,223 people.

Mark this as a favorite page section

Reordering Favorites

Favorites can be reorder to your liking by holding your cursor over the closed module and dragging the module to the desired location. To open a module, click the small arrow next to the title of the module.

Step 1: (Start with anyone who meets the selected criteria)

Favorites

> Location

> Applicant Status

>

Addresses

Other Search Criteria

> Activist Codes

> Address Types

> Age • Registration Date

> Blast Emails

◀ Step 1: New Search

Registration

Registration Status • Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased

and include Good Voting Address only

and include Good Mailing Address only

and exclude Do Not Walk

and exclude Do Not Call

and include Likely Cell Phone Exchanges

...less

Preview My Results

+

-- People

+ Add Step

Run Search

Running this search will clear your current list of 1,276,223 people.

Add Steps

Click **Add Step** to add or remove people, or narrow your list to a specific set of people.

Create A New Search

New SearchOpenSave

Step 1: (Start with anyone who meets the selected criteria)

Favorites

> Location★

> Applicant Status★

> Addresses★

Other Search Criteria

> Activist Codes★

> Address Types★

> Age • Registration Date★

> Blast Emails★

Step 1: New Search

Registration

Registration Status = Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased and include Good Voting Address only and include Good Mailing Address only and exclude Do Not Walk and exclude Do Not Call and include Likely Cell Phone Exchanges

Preview My Results

+ Add Step

+ Add People

- Remove People

Narrow People

Narrow by Sample

Narrow by Scores

Householding

-- People

Run Search

our current list of 1,276,223 people

Keep only people who meet a set of new criteria

Create A List All Rights Reserved.

Page 7

## Adding Additional Steps

When you select an option from the **Add Steps** menu, a new Criteria box will appear called **Step 2**. After selecting **Narrow**, the list will be narrow to include on those people who fit the selected criteria. The Step 2 criteria box will update to show the newly selected criteria.

The screenshot displays the 'Create A List' interface with two main sections: 'Step 2: Narrow People' and 'Step 1: New Search'.

**Step 2: Narrow People** (Left Panel):

- Header: Step 2: Narrow People (Keep only the people who meet the criteria selected below)
- Section: Location (marked with a star icon)
- Fields:
  - County: Orange
  - Precinct: [Dropdown]
  - Media Market: [Dropdown] (indicated by a pink arrow)
  - Census Tract: [Dropdown]
  - Voting City: [Dropdown]
  - Street Name: [Text]
  - Street # From: [Text] To: [Text] ☐ Odd Only ☐ Even Only
  - City: [Text]
  - Zip Radius: [Text] Miles From Zip Code: [Text]
  - Zip From: [Text] To: [Text]

**Step 1: New Search** (Right Panel):

- Registration: Registration Status = Registered Active or Registered Inactive or Applicant
- Suppressions:
  - exclude Deceased
  - and include Good Voting Address only
  - and include Good Mailing Address only
  - and exclude Do Not Walk
  - and exclude Do Not Call
  - and include Likely Cell Phone Exchanges

**Step 2: Narrow People** (Right Panel):

- Districts: County = Orange
- Registration: Registration Status = Registered Active or Registered Inactive or Applicant
- Suppressions:
  - exclude Deceased
  - and include Good Voting Address only
  - and include Good Mailing Address only
  - and exclude Do Not Walk
  - and exclude Do Not Call
  - and include Likely Cell Phone Exchanges

Buttons at the bottom right: Preview My Results, -- People, + Add Step, Run Search.



## Multiple Steps

When there are 3 or more steps, the steps (except the first step) can be reordered by holding the cursor over the Step title dragging and then dropping them in the preferred order. Steps can be deleted by clicking the trashcan icon.

The screenshot displays the 'Create A List' interface. At the top, a dark bar shows 'Step 3: Add People' with a dropdown arrow and the instruction 'Add any people who meet the criteria selected below)'. Below this, a 'Favorites' section lists search criteria: 'Location' (with a star icon), 'Applicant Status' (with a star icon), 'Addresses' (with a star icon), and 'Activist Codes' (with a star icon). The 'Location' section is expanded, showing fields for County, Media Market, Street Name, Street # From/To (with checkboxes for 'Odd Only' and 'Even Only'), City, Zip Radius, Miles From Zip Code, and Zip From/To. On the right, a mobile preview window shows a list of steps: 'Step 1: New Session', 'Step 3: Add People' (highlighted with a red box and a trashcan icon), and 'Step 2: Narrow People'. The 'Step 3: Add People' preview shows filters for Race (African American), Registration Status (Registered Active or Registered Inactive or Applicant), and Suppressions (exclude Deceased, include Good Voting Address only, include Good Mailing Address only, exclude Do Not Walk, exclude Do Not Call, include Likely Cell Phone Exchanges). At the bottom, there is a '+ Add Step' button and a green 'Run Search' button.

Refresh Step

Once the new search criteria is selected, the Step 2 Criteria display will fade to white. Clicking **Refresh Step** will display the new search criteria. It is not necessary to click **Refresh Step** before clicking Run Search. Clicking **Preview My Results** or **Run Search** will automatically refresh the Criteria window.

Step 3: Narrow PeopleKeep only the people who meet the criteria selected below

Favorites

Location

County

Media Market

Street Name

Street # FromToOdd OnlyEven Only

City

Zip RadiusMiles From Zip Code

Zip FromTo

Applicant Status

Addresses

Other Search Criteria

Activist Codes

Step 2: Narrow People

Districts

County = Orange

Registration

Registration Status = Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased

and include Good Voting Address only

and include Good Mailing Address only

and exclude Do Not Walk

and exclude Do Not Call

and include Likely Cell Phone Exchanges

Step 3: Narrow People

Registration

Registration Status = Registered Active or Registered Inactive or Applicant

Suppressions

exclude Deceased

and include Good Voting Address only

and include Good Mailing Address only

and exclude Do Not Walk

and exclude Do Not Call

and include Likely Cell Phone Exchanges

Refresh Step

Preview My Results

-- People

Add StepRun Search

Clicking preview results will display the number of people, in the list. Click the + button to display the number of doors and mailboxes. This feature saves steps, so you don't have to run a full search just for total counts.

Create A List All Rights Reserved.

Run Search

Click **Run Search** to create the new list based on the selected search criteria. Running a new Create A List search will overwrite any existing list that isn't saved.

Miles From Zip Code

To

To

To

To

Suppressions

exclude [Deceased](#)

and include [Good Voting Address](#) only

and include [Good Mailing Address](#) only

and exclude [Do Not Walk](#)

and exclude [Do Not Call](#)

and include [Likely Cell Phone Exchanges](#)

...less

Step 2: Remove People

Voting History – All of the following:

[2012 General](#) = [Did Not Vote](#)

and [2010 General](#) = [Did Not Vote](#)

and [2008 General](#) = [Did Not Vote](#)

and [2006 General](#) = [Did Not Vote](#)

and [2004 General](#) = [Did Not Vote](#)

Registration

[Registration Status](#) = [Registered Active](#) or [Registered Inactive](#)

or [Applicant](#)

Suppressions

exclude [Deceased](#)

and include [Good Voting Address](#) only

and include [Good Mailing Address](#) only

and exclude [Do Not Walk](#)

and exclude [Do Not Call](#)

and include [Likely Cell Phone Exchanges](#)

...less

Preview My Results

+

1,276,223 People

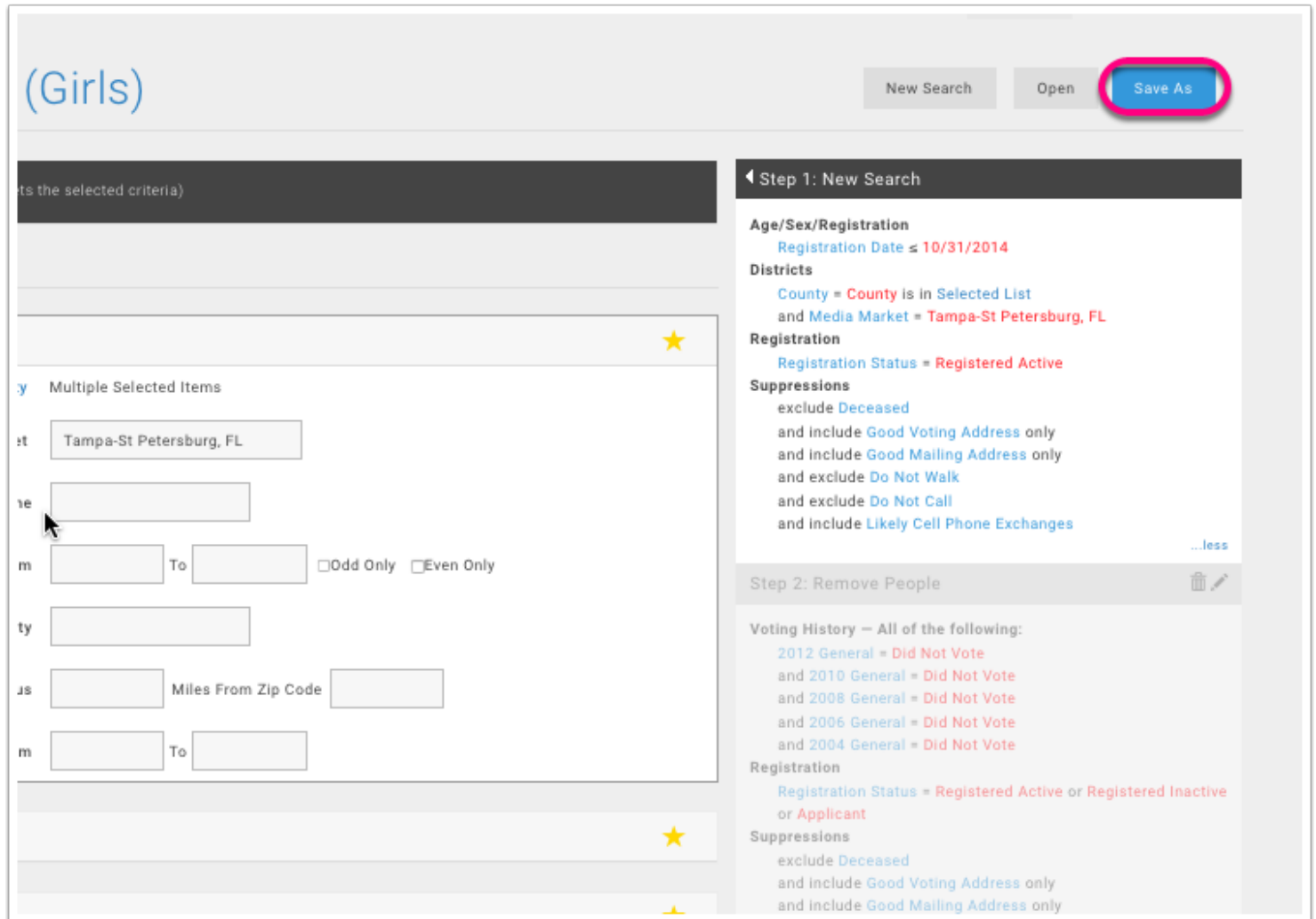
+ Add Step

▶ Run Search

Run Search and load results to My List

## Save Searches

Searches can be saved directly from the Create A List screen by clicking the **Save As** button.



The screenshot displays the 'Create A List' interface. At the top left, the text '(Girls)' is visible. In the top right corner, there are three buttons: 'New Search', 'Open', and 'Save As'. The 'Save As' button is highlighted with a red circle. The main content area is divided into two columns. The left column contains search criteria fields: 'Multiple Selected Items', 'County' (set to 'Tampa-St Petersburg, FL'), 'Age' (with a dropdown arrow), 'M' (with a dropdown arrow), 'To' (with a dropdown arrow), 'Odd Only' and 'Even Only' checkboxes, 'City' (with a dropdown arrow), 'Miles From Zip Code' (with a dropdown arrow), and 'M' (with a dropdown arrow). The right column shows the search results and filters. It includes a 'Step 1: New Search' section with filters for 'Age/Sex/Registration' (Registration Date ≤ 10/31/2014), 'Districts' (County = County is in Selected List and Media Market = Tampa-St Petersburg, FL), 'Registration' (Registration Status = Registered Active), and 'Suppressions' (exclude Deceased, and include Good Voting Address only, and include Good Mailing Address only, and exclude Do Not Walk, and exclude Do Not Call, and include Likely Cell Phone Exchanges). Below this is a 'Step 2: Remove People' section with a 'Voting History' filter (All of the following: 2012 General = Did Not Vote, and 2010 General = Did Not Vote, and 2008 General = Did Not Vote, and 2006 General = Did Not Vote, and 2004 General = Did Not Vote) and 'Registration' (Registration Status = Registered Active or Registered Inactive or Applicant) and 'Suppressions' (exclude Deceased, and include Good Voting Address only, and include Good Mailing Address only). The 'Save As' button is located in the top right corner of the search results section.

Save Search Menu

Saving your search resembles the Save List As page. Create A List saves the list as a search rather than a fixed list.

Step 1: (Start with anyone who meets the selected criteria)

Step 1: New Search

Age/Sex/Registration

Save Search

New Search

Replace an existing Search

Folder

New Folder

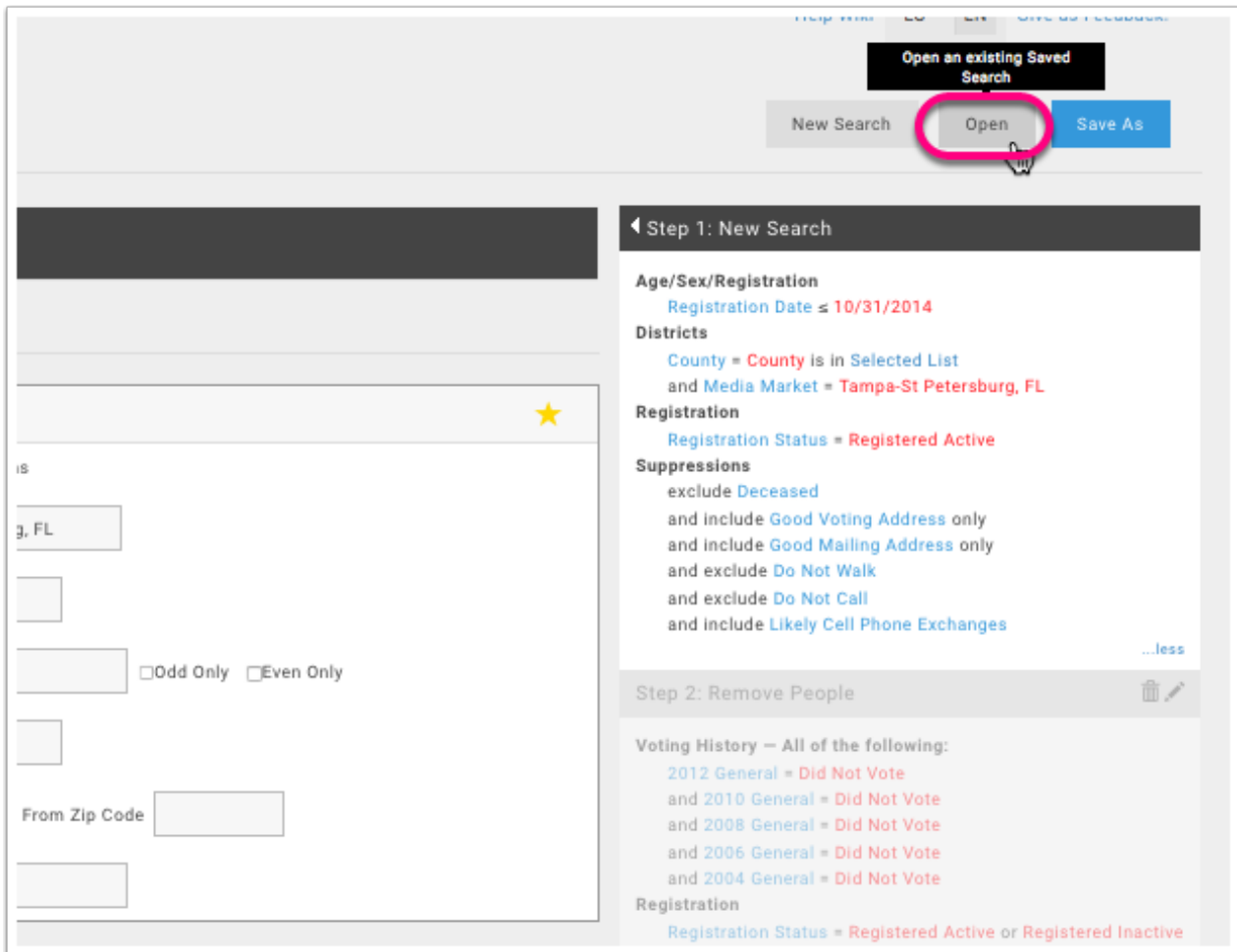
Name

Description

Save

## Open Saved Search

Clicking the Open button allows you to open saved Searches from the Create A List page. You will not be able to open saved fixed lists this way.



The screenshot shows the 'Create A List' interface. At the top, there are three buttons: 'New Search', 'Open', and 'Save As'. The 'Open' button is highlighted with a red circle and a mouse cursor. Above the 'Open' button is a black button labeled 'Open an existing Saved Search'. Below the buttons, the interface is divided into two main sections. The left section is titled 'Step 1: New Search' and contains various search criteria fields, including 'Age/Sex/Registration', 'Districts', 'Registration', and 'Suppressions'. The right section is titled 'Step 2: Remove People' and contains a list of voting history and registration status. The 'Open' button is located between these two sections.

Open an existing Saved Search

New Search Open Save As

Step 1: New Search

Age/Sex/Registration  
Registration Date ≤ 10/31/2014

Districts  
County = County is in Selected List  
and Media Market = Tampa-St Petersburg, FL

Registration  
Registration Status = Registered Active

Suppressions  
exclude Deceased  
and include Good Voting Address only  
and include Good Mailing Address only  
and exclude Do Not Walk  
and exclude Do Not Call  
and include Likely Cell Phone Exchanges

...less

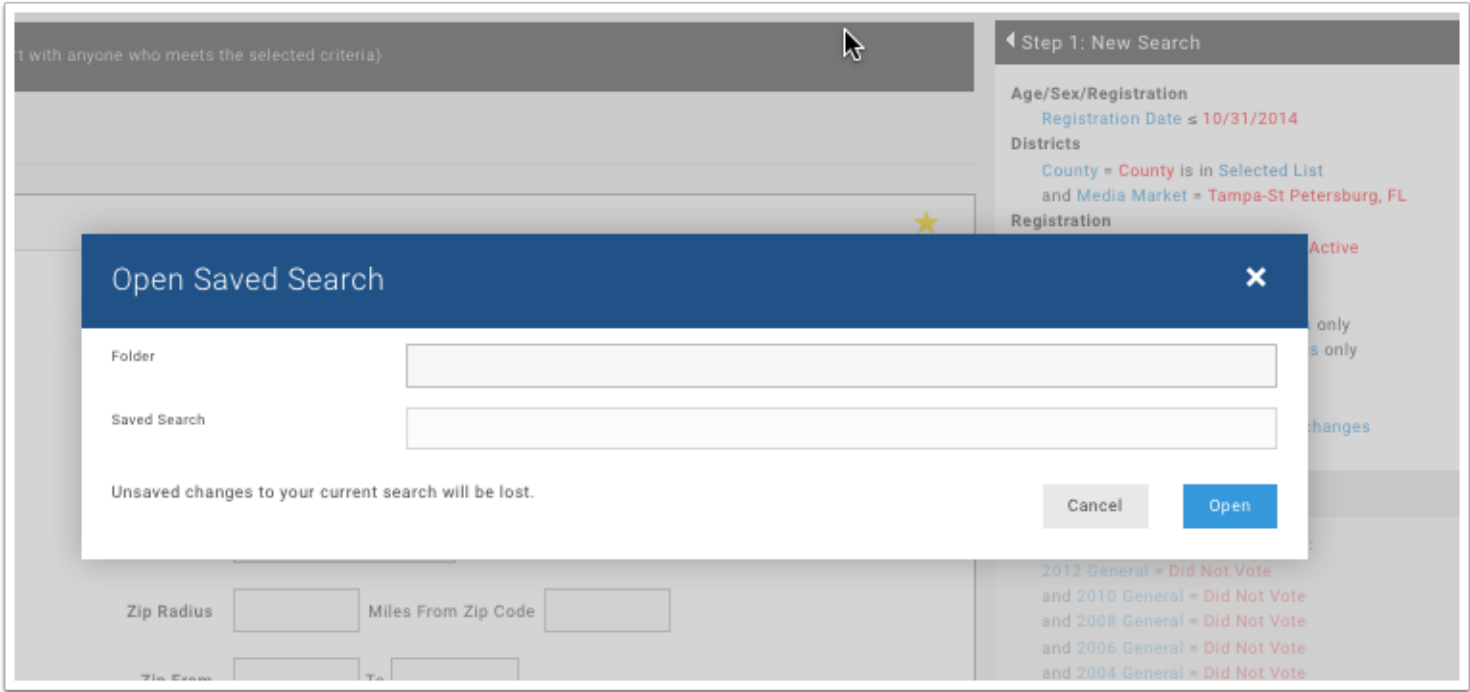
Step 2: Remove People

Voting History — All of the following:  
2012 General = Did Not Vote  
and 2010 General = Did Not Vote  
and 2008 General = Did Not Vote  
and 2006 General = Did Not Vote  
and 2004 General = Did Not Vote

Registration  
Registration Status = Registered Active or Registered Inactive

Open Saved Search Menu

This menu allows you to choose from all the searches saved in the My Folders section of your account.

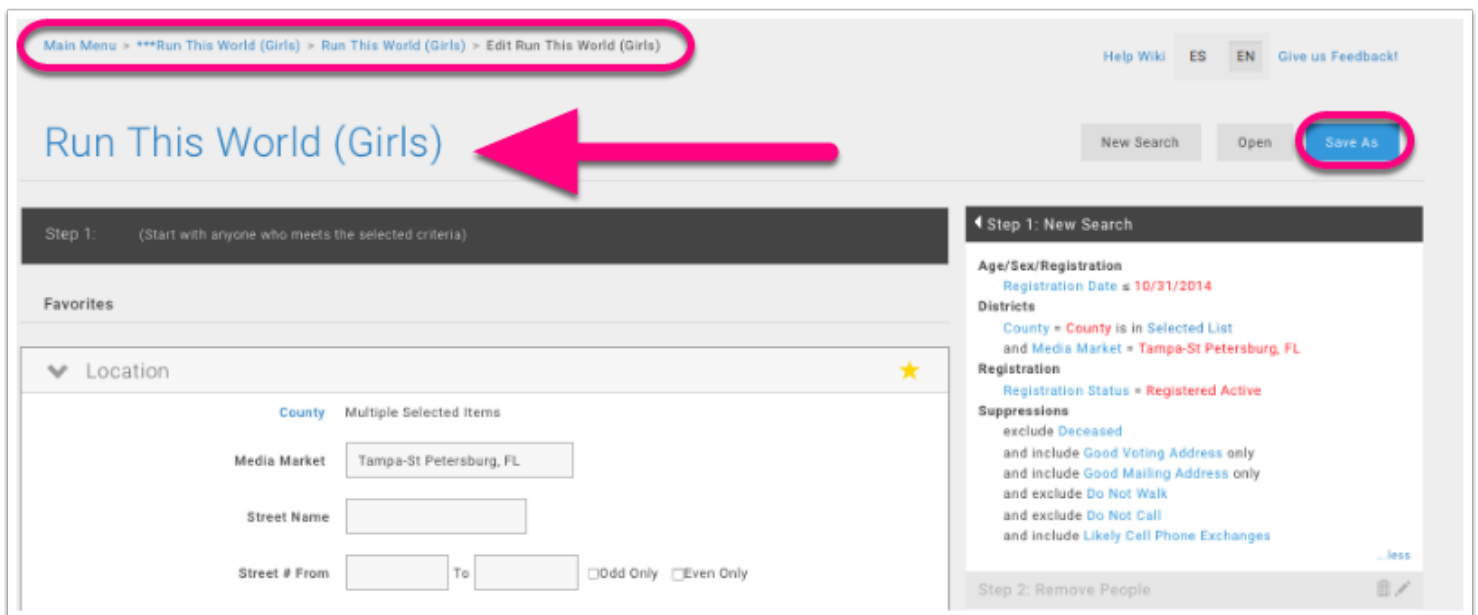




## Edit Specific List

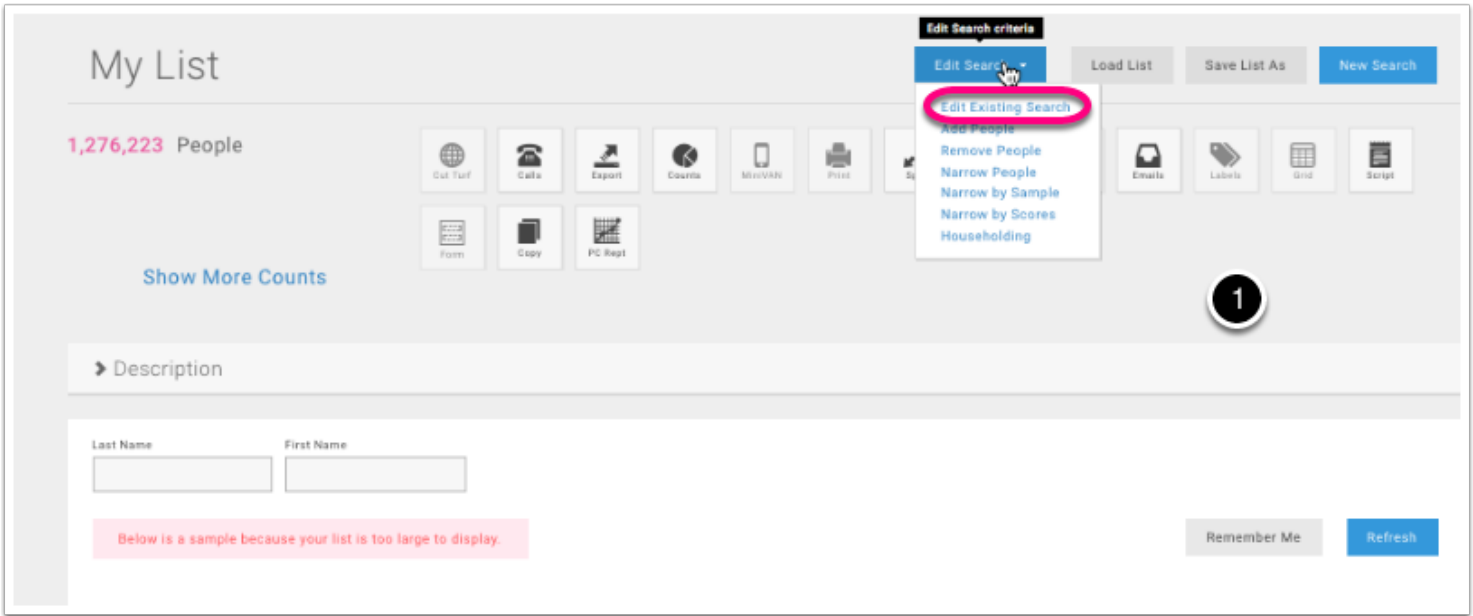
Once a saved list is opened, the name of the list is displayed. The breadcrumb trail will now direct you to the specific list and the folder containing the search.

Also a **Save As** button now appears. This feature allows you to save different versions of your search.



Edit Existing Search

A list can be edited using the drop down menu. Clicking **Edit Existing Search** returns you to the Create A List screen where you can make changes to your existing list. Lists can be saved as usual by clicking the **Save List As** button.



## My List Toolbar

### My List

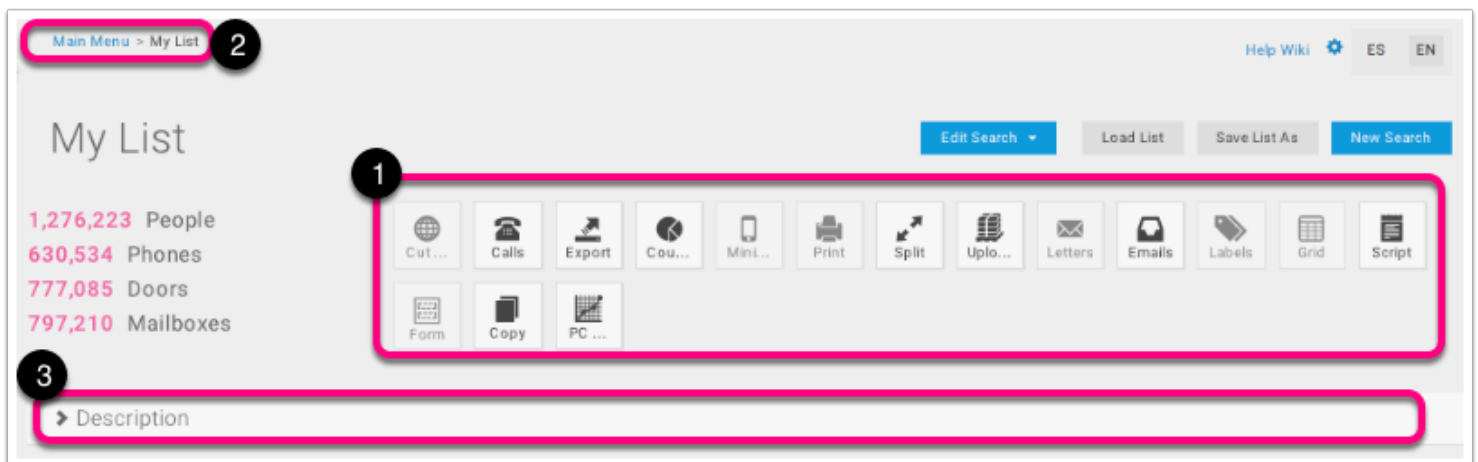
#### 1. My List Toolbar

- Export/Print your list for calling or walking,
- Create a virtual phone bank
- Analyze data
- Add or Remove people from list
- Narrow list

2. Anywhere in VAN you can return to the Main Menu using this breadcrumb trail

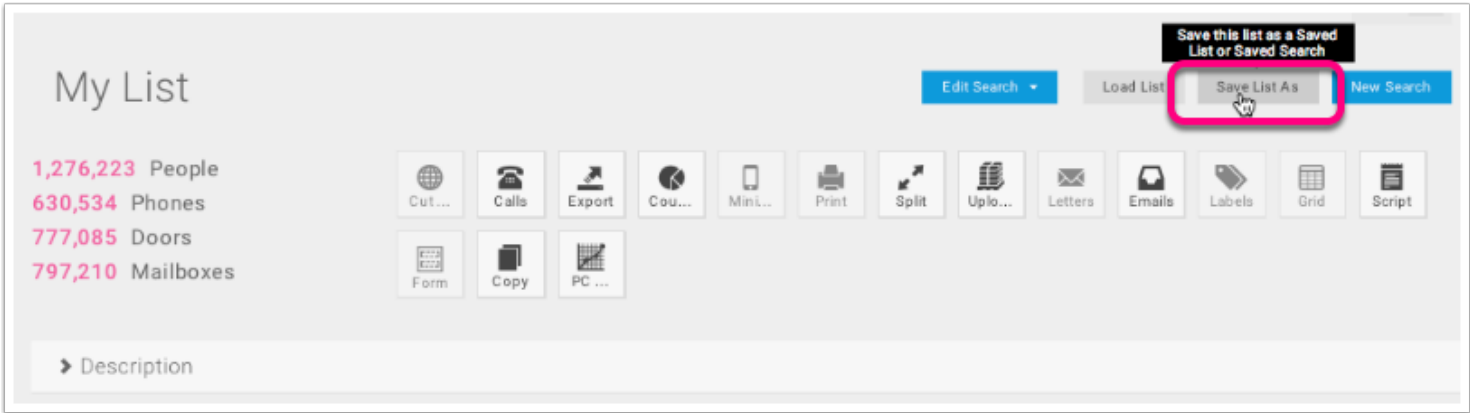
3. Description will show the search criteria used to create this list

You will not see your entire list from this screen, but you can still use with your entire list.



Save List As

To save the current list click the **Save List As** button.



## Save My List

Pressing **Save List As** bring up this screen.

Create a New Folder by checking the **New Folder** box.

The list should have a descriptive name that will be easily identifiable from a list of multiple lists.

### 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

Sharing your list

Sometimes you need to share your list with co-workers. This is fairly easy to do. You will click on the folder name in "View My Folders"

My Folders

Add New Folder

Folder Name

File Name

User Group

Type

Active

Remember Me

Refresh

Name	Owner	Created
***Run This World (Girls)	Harper-Smith, Amy	1/20/15
1/20/15	Harper-Smith, Amy	10/24/14
5/24/13	Harper-Smith, Amy	5/24/13

Sharing List continued

Then click the **Edit Folder** button

\*\*\*Run This World (Girls)

Print All

Edit Folder

File Name

Type

Owner

Date From

Date To

Remember Me

Refresh

Type	Name	Description	People	Owner	Date Created	View Map	Refresh	Print Region	Edit
Search	Run This World (Girls)			Harper-Smith, A.	1/20/15				Edit

1 Item · 1 Page

## Sharing List

Select the name of the person you want to share the list with and click **Add**.

To unshare, click on the person's name in the left hand column and click **Remove**.

You may need to allow other users to save into this folder. If for example, you created a list for someone else to use for creating walk lists. If so, click the **Allow other users to save into this folder** checkbox before clicking **Save**.

\*\*\*Run This World (Girls)

Name \*

\*\*\*Run This World (Girls)

☐

Allow other users to save into this folder

Description

Created By

Harper-Smith, Amy (1/20/15)

Status

☒ Active

☐ Inactive

Delete

Save

User Access

Committee

Shared Admin

Users with Access

Remove

Users **without** Access

Brinkman, Chris

Christie, George

Coleman, Ed

Gill, Chris

Henry, Owen

Joseph, David

Nguyen, Jack

Zateslo, Nic

Add