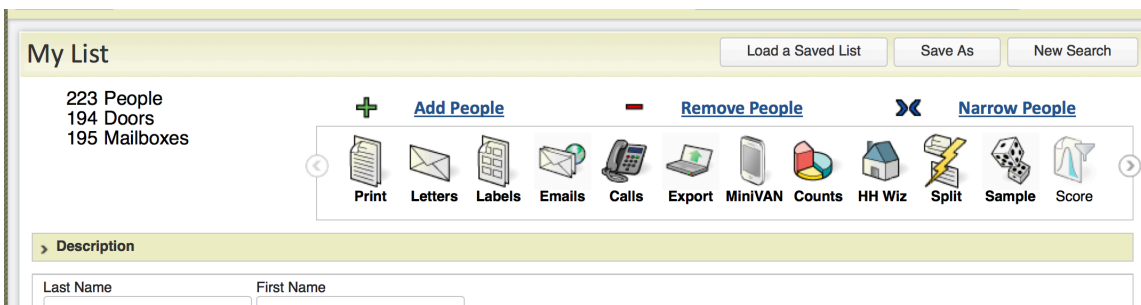


Saving Lists to Folders and Sharing Folders

This 1 pager will outline how to save lists into folders and share them with others. We will begin this guide after creating a list, if you need guidance on how to **create a list**, there is a 1 pager on that process on our data training website, found at: <https://sites.google.com/site/ofa2013data/>

Once we have created our list, we will have an overview of who is in our list, how many people are in it and we are able to proceed in a few different ways:



My List

223 People
194 Doors
195 Mailboxes

Load a Saved List Save As New Search

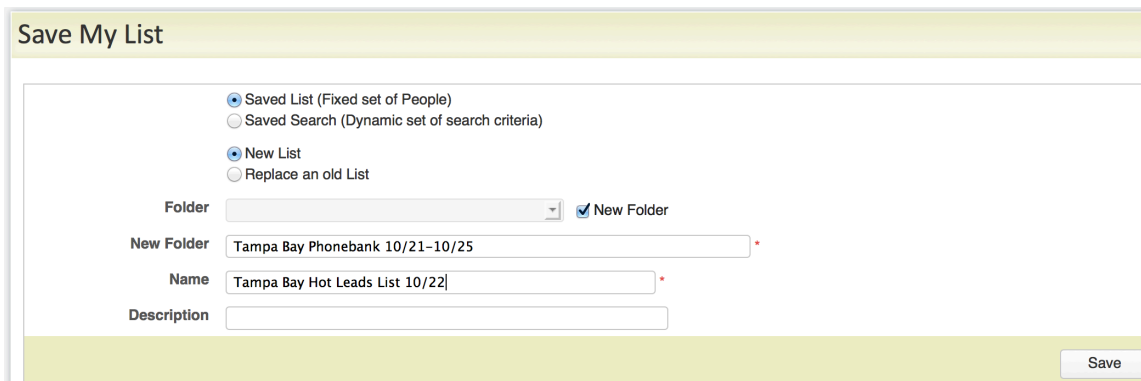
+ Add People - Remove People X Narrow People

Print Letters Labels Emails Calls Export MiniVAN Counts HH Wiz Split Sample Score

> Description

Last Name First Name

We have a few options here, but we want to click **Save As** at the top of our screen. Once we click **Save As**, we will then click the bubble next to **Save List (Fixed set of People)** and then we are able to name our folder and 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

New Folder

Name

Description

Save

You will not need to create a new folder every time you save a list. For example, if you are making lists for an entire week's phonebanks, the folder can just be named similar to the example below:

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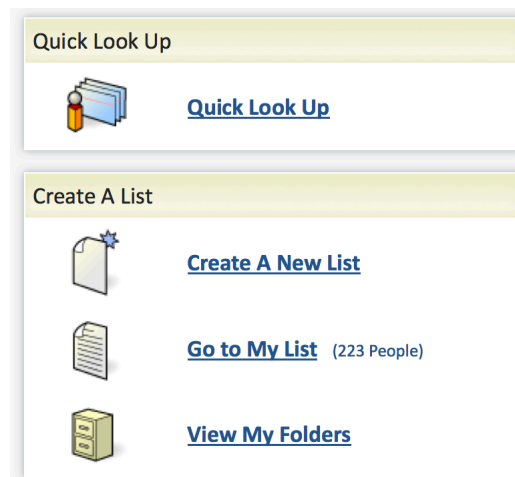
New Folder *

Name *

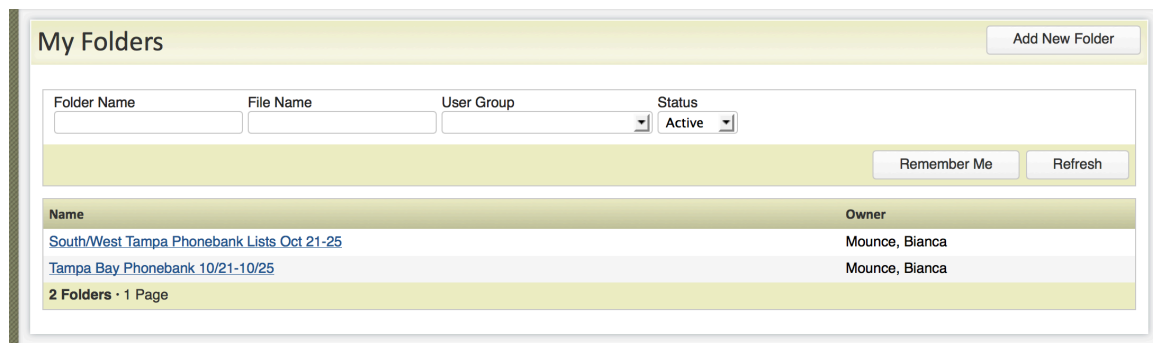
Description

The name of the actual list should reflect the geographic area you're calling, the target and date you pulled the list. The date is important so that you can know when a list is "old" – we should not be using lists that are more than a few days old.

Once we have saved named our folder and file, we will click save. We can access this folder from the Main Menu, by clicking on **View My Folders**:



Once we click the link of **View My Folders** you can see the folders you have created and you can click on them.



We will click on the **Tampa Bay Phonebank Folder** and once in the folder, we will click on **Edit Folder** in the top right hand corner:

Tampa Bay Phonebank 10/21-10/25
Print All
Edit Folder

File Name
Type
Owner
Date From
Date To

Remember Me
Refresh

Type	Name	Description	People	Owner	Date Created	Edit
List	Tampa Bay Hot Leads List 10/22		223	Mounce, B.	10/22/13	Edit

1 Item · 1 Page

Once in the folder, we are the only people who have access to it, but we can grant access to others. On the right hand side – we are able to see a list of VAN users who do not have access to your folders. Only gives access to those who **need** access. You can scroll until you find their name:

Committee Organizing for Action

Users with Access

Remove

Users **without** Access

Simmons, Patricia
Smith, Carole
Smith, Elva
Smith, Gerri
Smith, Jaclyn
Smith, John
Smith, Sara
Snurpus, Scott
Snurpus, Suzanne
Sommer, Justin

Add

Then click **Add**:

Save

User Access

Committee Organizing for Action

Users with Access

Sommer, Justin

Remove

Users **without** Access

A, B
Abouarab, Jessy
Acevedo, Paula
Adai, Rossiu
Alcorn, Peggy
Alcorn, Peggy
ALDeen, Nour
Alexander, Annetta
Alquizola, Lucienne
Anarumo, Paul Edward

Add

Now we can see the user we wanted to have access has moved to the column on the left and has access to our folder. They will be able to see the folder when they log into VAN and click on **View My Folders**.

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