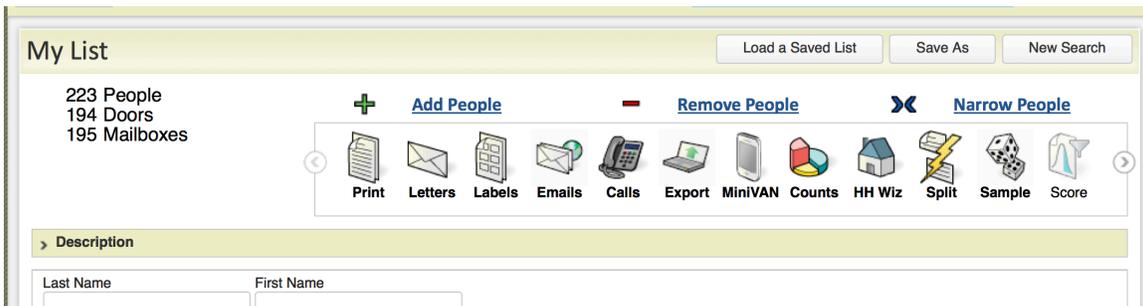


## Saving Lists to Folders and Sharing Folders

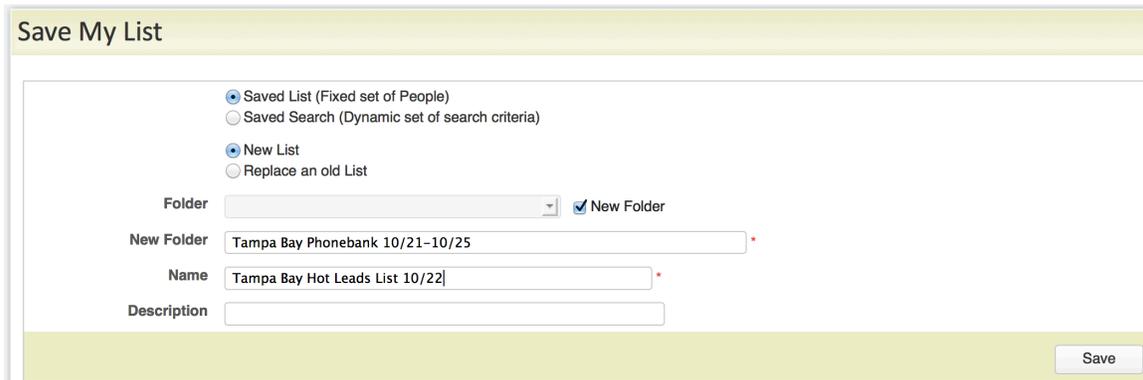
This 1 pager will outline how to save lists into folders and share them with others. We will begin this guide after creating a list, if you need guidance on how to **create a list**, there is a 1 pager on that process on our data training website, found at: <https://sites.google.com/site/ofa2013data/>

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:



The screenshot shows the 'My List' interface. At the top, there are buttons for 'Load a Saved List', 'Save As', and 'New Search'. Below these, the list statistics are displayed: 223 People, 194 Doors, and 195 Mailboxes. A row of action buttons includes '+ Add People', '- Remove People', and '<> Narrow People'. A secondary row of icons represents various actions: Print, Letters, Labels, Emails, Calls, Export, MiniVAN, Counts, HH Wiz, Split, Sample, and Score. Below the icons is a 'Description' section with input fields for 'Last Name' and '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:



The screenshot shows the 'Save My List' dialog box. It has two main sections. The first section contains radio buttons for 'Saved List (Fixed set of People)', 'Saved Search (Dynamic set of search criteria)', 'New List', and 'Replace an old List'. The second section contains a 'Folder' dropdown menu, a 'New Folder' checkbox, and input fields for 'New Folder' (containing 'Tampa Bay Phonebank 10/21-10/25'), 'Name' (containing 'Tampa Bay Hot Leads List 10/22'), and 'Description'. A 'Save' button is located at the bottom right.

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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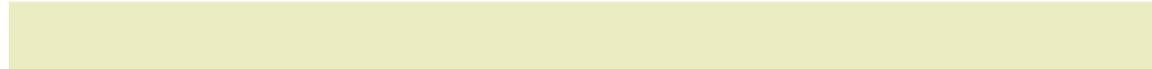
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**New Folder**  \*

**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**:

A screenshot of a main menu with two sections. The first section, "Quick Look Up", contains an icon of a folder and a pencil, and a link "Quick Look Up". The second section, "Create A List", contains three icons: a document with a star, a document, and a folder. Below each icon is a link: "Create A New List", "Go to My List (223 People)", and "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.

A screenshot of the "My Folders" page. At the top right is an "Add New Folder" button. Below is a search bar with fields for "Folder Name", "File Name", "User Group" (a dropdown menu), and "Status" (a dropdown menu set to "Active"). Below the search bar are "Remember Me" and "Refresh" buttons. A table lists folders with columns for "Name" and "Owner".

Name	Owner
<a href="#">South/West Tampa Phonebank Lists Oct 21-25</a>	Mounce, Bianca
<a href="#">Tampa Bay Phonebank 10/21-10/25</a>	Mounce, Bianca

2 Folders · 1 Page

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:

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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	<a href="#">Tampa Bay Hot Leads List 10/22</a>		223	Mounce, B.	10/22/13	<a href="#">Edit</a>

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

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

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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