ORGANIZING FOR **ACTION**

# Creating An Event in VAN

The Events tool in SmartVAN is a versatile and extremely useful way to organize who need to call to remind them to attend our events, to track how active our volunteer base is, and to build our list of active volunteers moving forward. Events need to be created on barackobama.com to allow people to sign up for them online, but events also need to be present in VAN to schedule people for them from phone calls, and to keep track of the confirmation call process & event attendees. Right now, events created on BO.com do not show up in VAN automatically, so they need to be created manually.

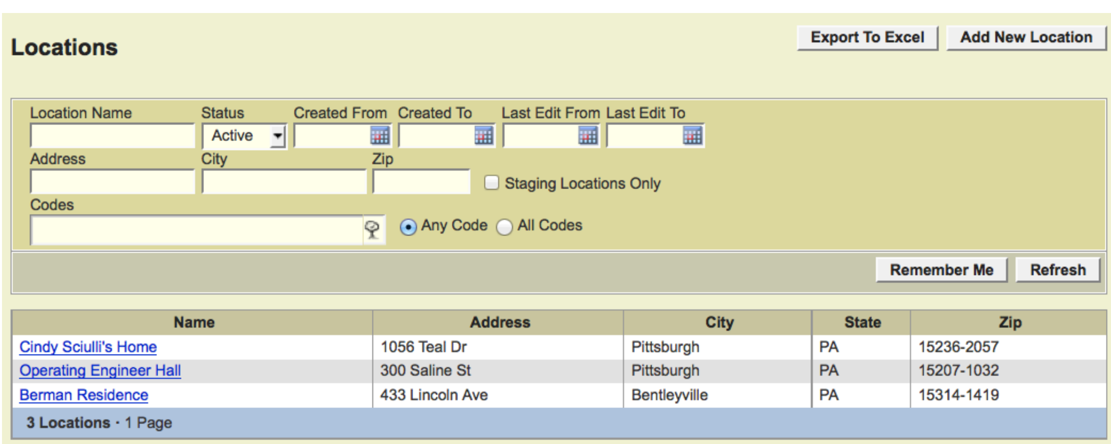
The life cycle of an event is broken down below, and that serves as an outline of the process guide for this tool (after event date/location/time are locked and event created on BO.com):

Create event in SmartVAN
    Create Location in SmartVAN if a new location (before creating event)
Schedule people into event from call sheet and/or VPBs
Make Confirmation calls (remind people to attend the next day)
Close out shifts (mark attendees as "Completed", other results for non-attendees)

This guide will walk you through the process outlined above for the SmartVAN components.

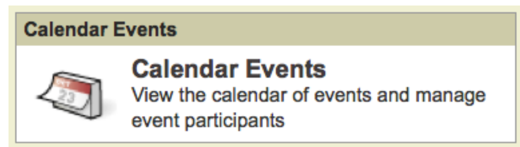
## Creating an Event in SmartVAN:

Once your event is locked down, you need to create it in SmartVAN – to do so, you will need the event date, name, type, location, and shift information. Before you actually add the event though, you need to make sure the **location** of your event has been added to SmartVAN, and if not, add that location yourself. To do so, go to the main menu and click on Events • Titles on the far left side of the screen, and then click on Locations.



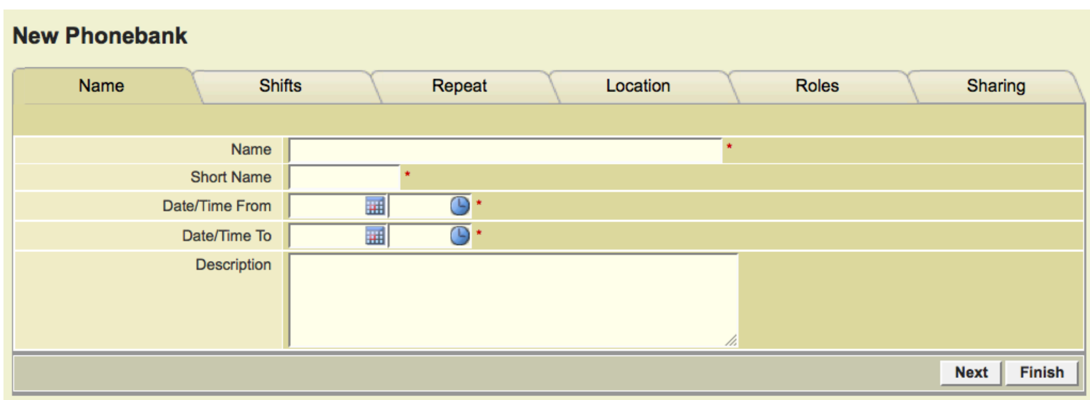
ORGANIZING FOR **ACTION**

This screen allows you to search existing locations in your state, including locations from 2012 that were marked inactive (change Status and Refresh to view) – those can be reactivated using the Name field inside the location's profile. However, in most cases a new location can be added for simplicity; just avoid duplicating an active location, as they can be used to search. After clicking Add New Location, supply a name for the location, the address, and click Next.




After adding the location of your event, go back to the Main Menu and click on Calendar Events. Either the Calendar or List View can be used at this point to create a new event. After clicking on one, click the Add New Event button (calendar with green (+) circled) in the upper right of the screen.

**Event Type**: Before reaching the new event page, select the type of event – this will also set what roles are available at that event, often just Attendee and Host but also including Data Entry, Phone Banker, or others. After doing so, each step proceeds in sequence on a separate tab of the event creation window and most are required fields.




**Name**: Specify the name of your event, a short name shown on the calendar, and date/time. Events can cross from one day to another but this is not the place referring to repeating events.

**Shifts**: Enter the number of shifts for the event, and if more than 1, the time for each shift. You also have the ability to change the name of each shift if desired.

**Repeat**: You may set an event to repeat on a daily, weekly or monthly basis; in case the event changes or stops recurring, it is best to limit this to a month out. Keep duration within reason!

**Location**: Click Add Locations to assign one or more locations to your event – this step is optional but highly encouraged for the ability to search events by location

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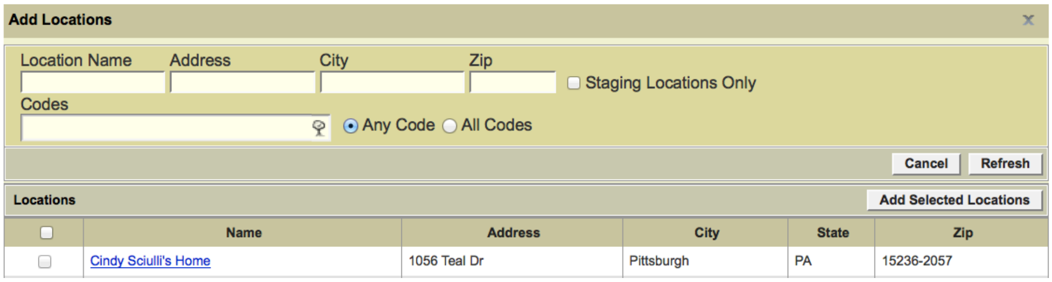
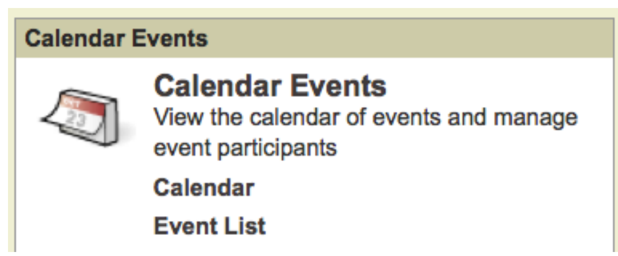



**Roles**: Select the roles available when scheduling for your event (*usually no need to change*)

**Sharing**: Set whether other people can edit your event or not, and click Finish.

This will bring you to your event's profile page where you can see the information you listed, and is also one place from which you'll access your event attendees later on.

**<u>Making Confirmation Calls:</u>**




Making confirmation calls is a key part of getting people to turn out to an event, as for many people that simple reminder can be the difference, and as such we want to track confirmation calls, and give people a tool to make them efficiently. This is best done through the Event Participant List section of the Events tool – to get there, you first locate your event:

<u>Via the Calendar:</u>
Using calendar view, use the small arrow on the left edge of the calendar to open the filter view, and you will be able to use filters that narrow the events shown based on event name, who created the event, locations, or types. Click the event name when you find it.

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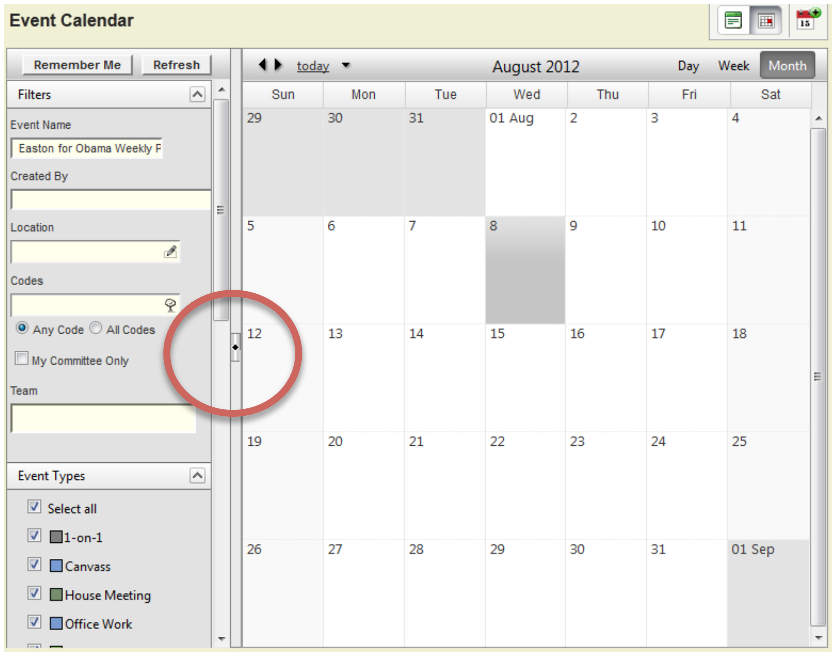
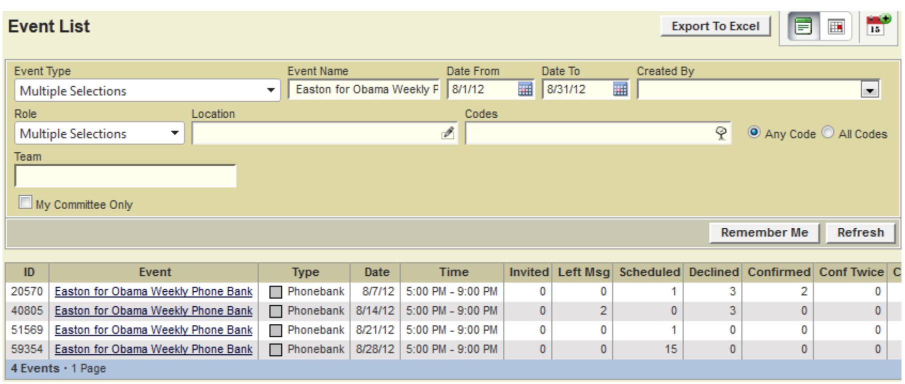



Via List View (aka Event List):

On the list view, the filters will automatically be displayed, and it may often be easier to locate your event from this screen using a wide date range and clicking Refresh. Click the event name.




| ID | Event | Type | Date | Time | Invited | Left Msg | Scheduled | Declined | Confirmed | Conf Twice |
|---|---|---|---|---|---|---|---|---|---|---|
| 20570 | Easton for Obama Weekly Phone Bank | Phonebank | 8/7/12 | 5:00 PM - 9:00 PM | 0 | 0 | 1 | 3 | 2 | 0 |
| 40805 | Easton for Obama Weekly Phone Bank | Phonebank | 8/14/12 | 5:00 PM - 9:00 PM | 0 | 2 | 0 | 3 | 0 | 0 |
| 51569 | Easton for Obama Weekly Phone Bank | Phonebank | 8/21/12 | 5:00 PM - 9:00 PM | 0 | 0 | 1 | 0 | 0 | 0 |
| 59354 | Easton for Obama Weekly Phone Bank | Phonebank | 8/28/12 | 5:00 PM - 9:00 PM | 0 | 0 | 15 | 0 | 0 | 0 |

4 Events · 1 Page

Once on the list itself, you will see a list of everyone currently scheduled for your event, complete with name, phone number, and current status. For everyone currently marked as Scheduled or Invited (also Left Message, best to speak to them directly), confirmation calls are made, and you can filter specifically to those people using the Status drop-down at the top and click Refresh. When making the calls, you have two options for saving the data:

Using Quick Actions button (suggested):

While making the calls, you can check off each person you confirm in the leftmost column and then click "Quick Actions" and then "Update Status" – select Confirmed, check Add Contact History, and specify the date, contacted how (phone) and

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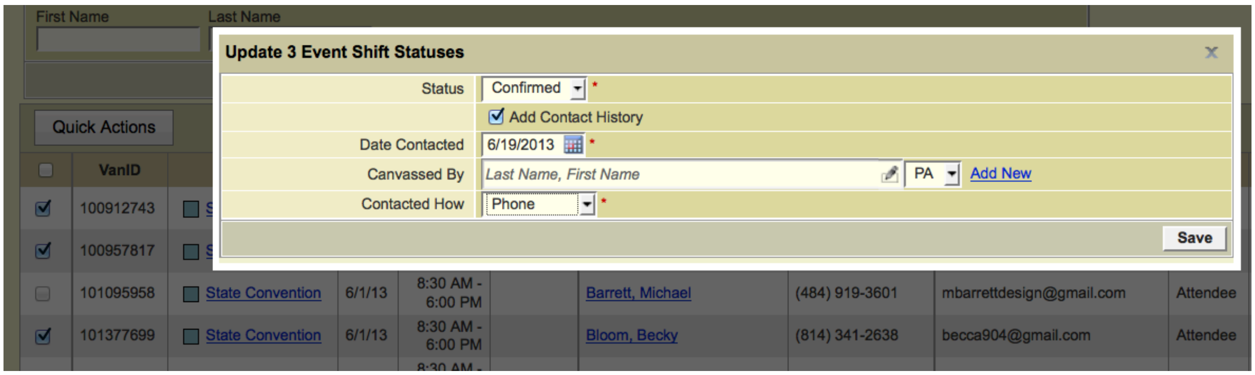
canvasser. This method allows you to add the contact history quickly and saves some work with the drop-down menus, although you'll need to keep track of the people who decline separately, or otherwise alternate between using them when a different response is given.




Using Drop-down Status menu for each person:

This method may be simpler but lacks the ability to generate a contact history record – you mark the current status of each person called using the drop-down menu and then click Save in the upper right portion of the attendee list.


As far as the responses to mark – Confirmed if the person is attending, Declined or Cancelled if they cannot attend and said so prior to the event. Left Message only if doing so.

## Closing Event Shifts:

This process is identical to those listed before – in the case of people who are scheduled for an event, follow the Confirmation call process and use Completed instead of Confirmed and No Show instead of Declined/Cancelled (only those still marked as Scheduled/Confirmed). Quick Actions is especially useful for closing shifts from a sign-in sheet, first marking all attendees completed, then leftover scheduled/confirmed as No Show. For people not already scheduled for the event who did show up, use Quick Mark and use Completed rather than Scheduled.