



Using the Calendar

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.

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.

The screenshot shows the "Locations" management page in SmartVAN. At the top right are buttons for "Export To Excel" and "Add New Location". Below these is a form with fields for "Location Name", "Status" (a dropdown menu currently set to "Active"), "Created From", "Created To", "Last Edit From", and "Last Edit To". There are also fields for "Address", "City", and "Zip". A checkbox labeled "Staging Locations Only" is present. Below the form is a "Codes" section with a search icon and radio buttons for "Any Code" (selected) and "All Codes". At the bottom right of the form are "Remember Me" and "Refresh" buttons. Below the form is a table listing existing locations.

Name	Address	City	State	Zip
Cindy Sciulli's Home	1056 Teal Dr	Pittsburgh	PA	15236-2057
Operating Engineer Hall	300 Saline St	Pittsburgh	PA	15207-1032
Berman Residence	433 Lincoln Ave	Bentleyville	PA	15314-1419

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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

Calendar Events
View the calendar of events and manage event participants

A small icon of a calendar with a date marker.



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.

The 'New Phonebank' form is a multi-tabbed interface. The tabs are: Name, Shifts, Repeat, Location, Roles, and Sharing. The 'Name' tab is currently active. It contains the following fields:

- Name:** A text input field with a red asterisk indicating it is required.
- Short Name:** A text input field with a red asterisk indicating it is required.
- Date/Time From:** A date/time picker with a calendar icon and a red asterisk indicating it is required.
- Date/Time To:** A date/time picker with a calendar icon and a red asterisk indicating it is required.
- Description:** A large text area for entering details about the event.

At the bottom right of the form are two buttons: 'Next' and 'Finish'.

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

The 'Add Locations' form is a window with a title bar and a close button. It contains the following fields and controls:

- Location Name:** A text input field.
- Address:** A text input field.
- City:** A text input field.
- Zip:** A text input field.
- Staging Locations Only:** A checkbox.
- Codes:** A text input field with a magnifying glass icon.
- Any Code / All Codes:** Radio buttons to select the search scope.
- Cancel / Refresh:** Buttons at the bottom right.
- Locations:** A table listing existing locations.
- Add Selected Locations:** A button at the bottom right of the table.

<input type="checkbox"/>	Name	Address	City	State	Zip
<input type="checkbox"/>	Cindy Sciulli's Home	1056 Teal Dr	Pittsburgh	PA	15236-2057

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

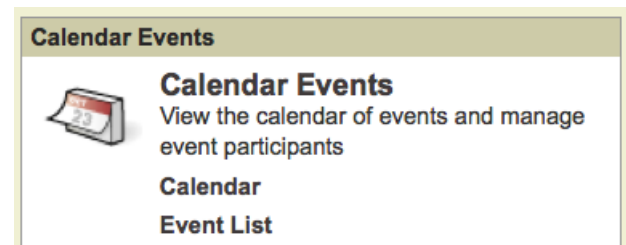


Sharing: Set whether other people can edit your event or not, and click Finish.

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.

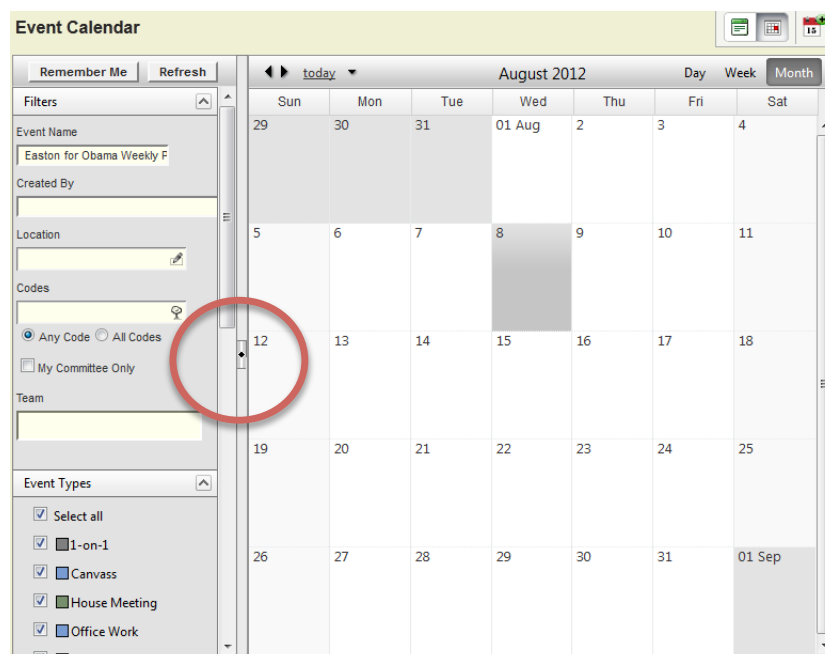
Making Confirmation Calls:

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:



Via the Calendar:

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.



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.

Event List Export To Excel 15

Event Type: Multiple Selections Event Name: Easton for Obama Weekly F Date From: 8/1/12 Date To: 8/31/12 Created By:
 Role: Multiple Selections Location: Codes: Any Code All Codes
 Team:
☐ My Committee Only
Remember Me Refresh

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

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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 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.

First Name: Last Name:
 Quick Actions
☐ VanID
☒ 100912743
☒ 100957817
☐ 101095958
☒ 101377699

Update 3 Event Shift Statuses



Status: Confirmed
☒ Add Contact History
 Date Contacted: 6/19/2013
 Canvassed By: Last Name, First Name PA Add New
 Contacted How: Phone
Save

VanID	Event	Date	Time	Name	Phone	Email	Status
101095958	State Convention	6/1/13	8:30 AM - 6:00 PM	Barrett, Michael	(484) 919-3601	mbarrettidesign@gmail.com	Attendee
101377699	State Convention	6/1/13	8:30 AM - 6:00 PM	Bloom, Becky	(814) 341-2638	becca904@gmail.com	Attendee

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.

	Role	Status	Recruited By	Signup Date	
	Attendee	No Show ▾	Myers, Greg 	5/28/13	Edit
	Attendee	Completed ▾	Monahon, Stephanie 	5/22/13	Edit

Save

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.