How to Use VAT to Improve the Voter Data in VAN

Step 4: Bulk Upload of a VAT Spreadsheet into a VAN Survey Question

The VAT to VAN Process

VAT (Voter Analysis Tools) has 3 kinds of voter data that can be extracted with pre-written programs, then uploaded into VAN (Votebuilder): New Voters (DEM and NPA voters new to your county since the last update); Status Changes (DEM and NPA voters who have become active or inactive); and Party Changes (voters who have changed their party affiliation). The groups are not mutually exclusive. For example, a voter may both become active and change party affiliation.

To extract data from VAT and upload it into VAN your county must be given VAT authorization and have a VAT Administrator. Send a request to rlbiltgen@me.com for VAT authorization. You also need VAN level 4 administrative privileges to complete the bulk upload.

In the detailed instructions that follow, New Voter information is used as the example. The procedure is quite similar for Party Changes and Status Changes. The different procedures used to bulk upload party and status change data are detailed after the applicable steps.

There are five steps to transfer information from VAT to VAN which should be done in order.

1) Download the appropriate VAT extraction program and save on your computer.

2) In VAT, use the program from step 1 to download a .csv spreadsheet with the information to upload into VAN.

3) In VAN, either select a previously created Survey Question or create a new Survey Question with responses that correlate with the information in the spreadsheet extracted from VAT.

4) In VAN, Bulk Upload the VAT spreadsheet into the Survey Question, creating a bulk upload mapping template to "map" the data in the spreadsheet to the Survey Question Responses or selecting a previously created mapping template.

5) To access the VAT data uploaded into VAN, use the Survey Question and responses you used to complete the bulk upload to create a targeted list of voters for canvassing.

Step 4 instructions detail how to bulk upload the saved VAT spreadsheet from step 2 into VAN using the survey question created in step 3. The first time VAT information is uploaded into a VAN survey question a mapping template must be created and saved as described in Section 4A. After a mapping template has been saved it can be used for future uploads as described in Section 4B.

Step 4A. Use Time Upload of a VAT Spreadsheet into a VAN Survey Question

4A.1 On the VAN **Main Menu** page check that My Voters is highlighted. Within the **Load Data** box, CLICK on **Run Bulk Uploads → Upload a New File.** This takes you to **Bulk Upload/Select Type**.

On the **Bulk Upload / Select Type** page, select **State File ID** in the drop-down menu as the mode to load data and click on "Next".

4A.2 This brings you to the **Upload a New File** page. Select a value for each item below.

- **Mapping Template** - SELECT **None**.
- **File Source** - SELECT **Direct Upload**
- **Select a File** – CLICK "Select a file" to see and select the .csv file stored in your computer that was downloaded from VAT. The file name will show by the "Select A File" box and in the "Import Name" box.
- **First Row –** CLICK to check box
- **Advanced** - CLICK to check box

When complete, CLICK **Upload** in bottom right.

4A.3 This brings you to the **Bulk Upload / Unmatched People Alert** page showing the number of people in the VAT file that are NOT found in VAN. If it is less than ~1% of your spreadsheet population, continue. If a greater number, delay the upload until the latest new registrants have been added to VAN. To continue, CLICK **Next**. (Do not click "Export Unmatched People".)
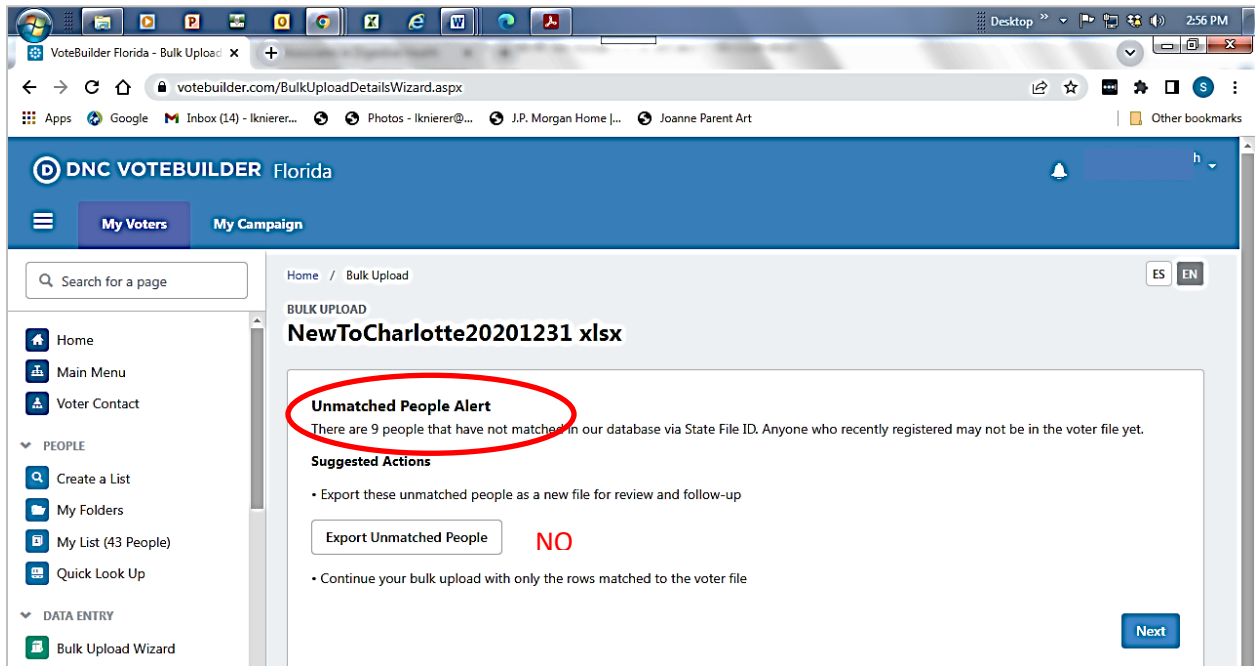
Note: If the data you are attempting to upload is recent within a couple months of the upload date, Florida VAN may not have been updated yet since it may take 2-6 weeks or more to complete (especially for "New Voter" data).

Below is a magnified view of the Bulk Upload screen with a significant number of unmatched people (418). At this point, consider abandoning the upload and attempting it later, after a fresh batch of FDOE data has been uploaded into VAN.

BULK UPLOAD

NewToCharlotte20220228 xlsx

Unmatched People Alert
There are 418 people that have not matched in our database via State File ID. Anyone who recently registered may not be in the voter file yet.
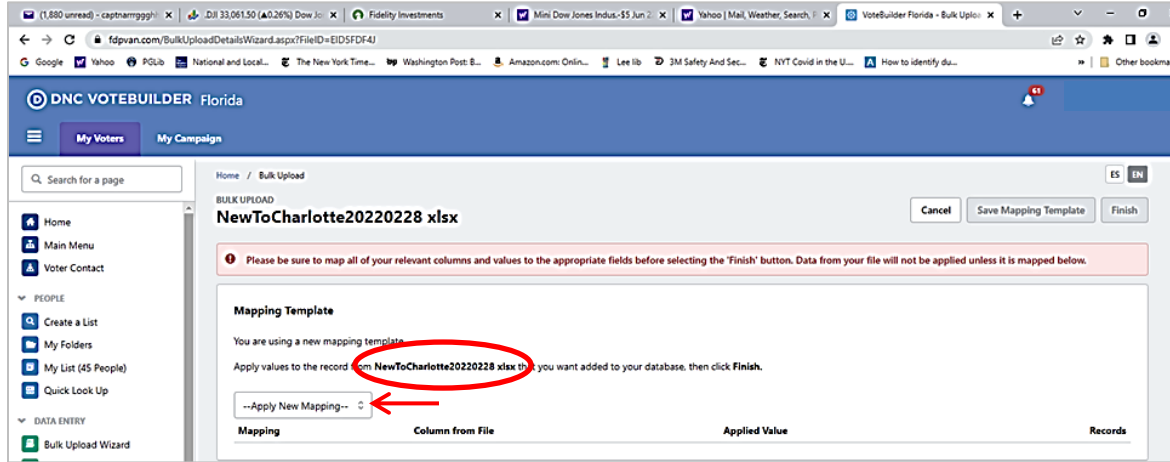
Suggested Actions
• Export these unmatched people as a new file for review and follow-up

Export Unmatched People

• Continue your bulk upload with only the rows matched to the voter file

Next

4A.4 On the next **Bulk Upload** page, verify the name of the file you will upload in the **Mapping Template** box. In the **Apply New Mapping** box, SELECT **Apply Survey Response**.

4A.5 The *first* **Apply Survey Response** page maps the VAT spreadsheet column headers to the survey question and selects the column header which will be mapped to the Survey Question Responses. The following example is for New Voters data.

- **Survey Question** - SELECT **Apply One Value to All Records**.
  From the pull-down menu SELECT the name of the survey question you created for the type of VAT data being uploaded.
- **Survey Response** - SELECT **Choose Column from Data File** whose data will be mapped to the Survey Question responses**.**
  From the pull-down menu SELECT **New to (Your) County**
- **Campaign** – leave blank

- **Contacted How** - SELECT **Apply One Value to All Records.**
  From the pull-down menu SELECT **No Actual Contact**
- **Contacted When** – SELECT **Choose Column from Data File.**
  From pull-down menu SELECT **Date**
- **Canvasser** - SELECT **Choose Column from Data File.** SELECT **DOE Florida.**

- When complete, CLICK **Next**.
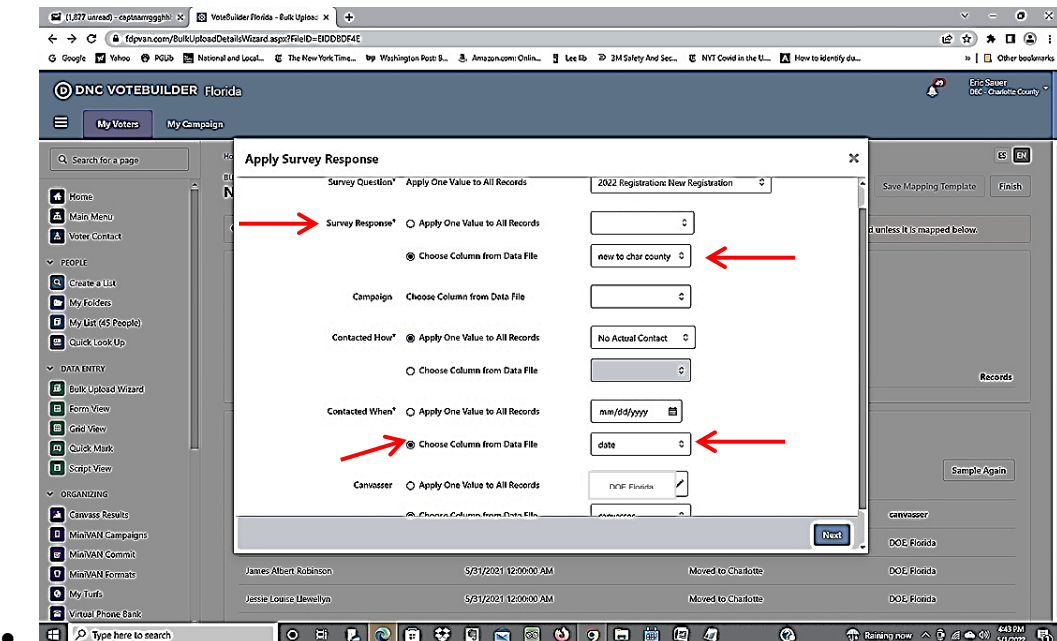
The table below shows how to map VAT data for Status Changes or Party Changes to the corresponding VAN survey question. The survey question title will vary for your county,

	Left Column	Right Column		
	Select for All 3	New Voters	Change of Status	Change of Party
Survey Question	Apply One Value to all Records	2022 Registration: New Registration	2022 Registration: Status Change	2022 Affiliation: Party Change
Survey Response	Choose Column From Data File	New to (Your) County	Status Change	Party Change
Campaign	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Contacted How	Apply One Value to all Records	No Actual Contact	No Actual Contact	No Actual Contact
Contacted When	Choose Column from Data File	Date	Date	Date
Canvasser	Choose Column from Data File	DOE Florida	DOE Florida	DOE Florida

4A.6 The s*econd* **Apply Survey Response** has automatically populated the left column on the screen with the column labels from the downloaded VAT .csv spreadsheet. You will map it to the Survey Question Responses in the right column. The Count column in each category is auto-filled.

| New to County automatically populated from the VAT spreadsheet data	Count auto calculated	Load as Survey Response drop-down menu of VAN Survey Question responses
Moved into County	#	Moved to (Your County)
Moved within County	#	Moved within County
Newly Reg	#	Newly Reg
No	#	No
Re-Registered	#	Re-Registered
Turned 18	#	Turned 18

After completing, click NEXT in lower right corner.
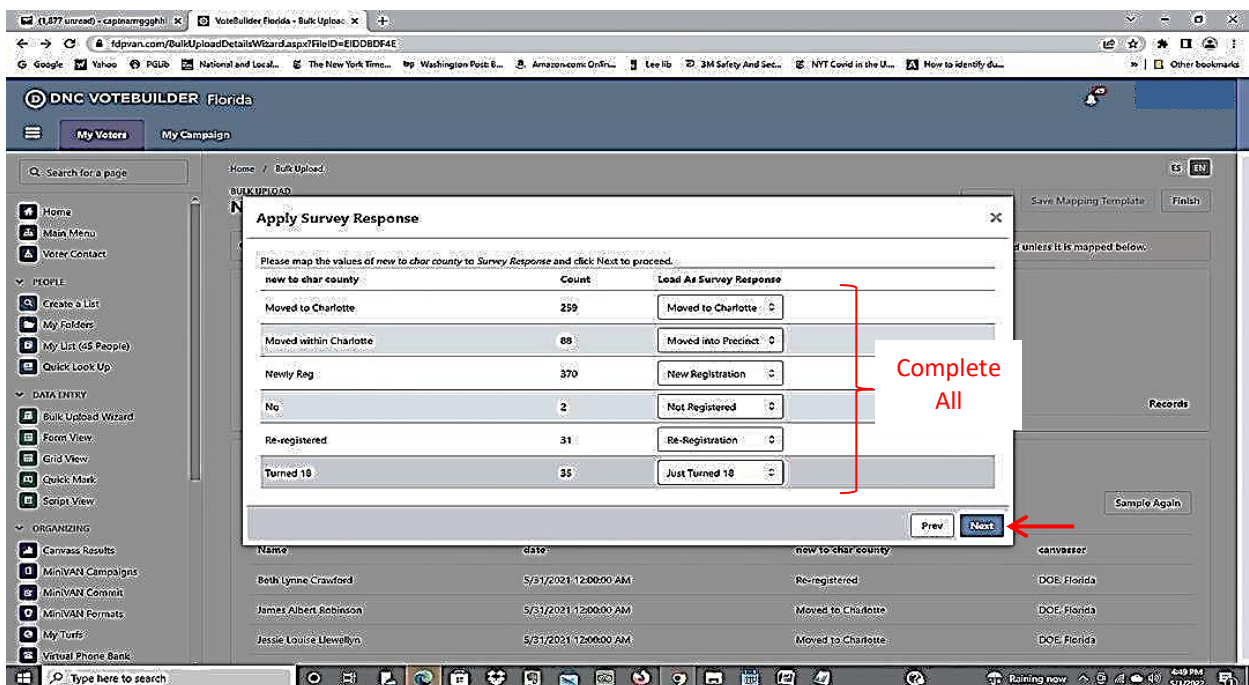
The table below shows the mapping templates for Status Change and Party Change VAT spreadsheets and their corresponding VAN survey questions.

| Apply Survey Response Mapping Substitutions			
Change of Status		Change of Party	
VAT Spreadsheet Info *Auto filled*	Load into Survey Question Response *select from drop-down*	VAT Spreadsheet Info *Auto filled*	Load into Survey Question Response *select from drop-down*
ACT->INA	ACT to INA	REP->DEM	REP to DEM
INA->ACT	INA to ACT	REP->NPA	REP to NPA
		REP->OTH	REP to OTH
		DEM->REP	DEM to REP
		DEM->NPA	DEM to NPA
		DEM-> OTH	DEM to OTH
		NPA->DEM	NPA to DEM
		NPA->REP	NPA to REP
		NPA-> OTH	NPA to OTH
		OTH->DEM	OTH to DEM
		OTH->REP	OTH to REP
		OTH->NPA	OTH to NPA

4A.7 This brings you to the **Save Mapping Template** dialogue box. Type in the file name to save your mapping template for future uploads of the same category of data. In this example the file name is VAT New Registered DEM_NPA. CLICK **Save.**
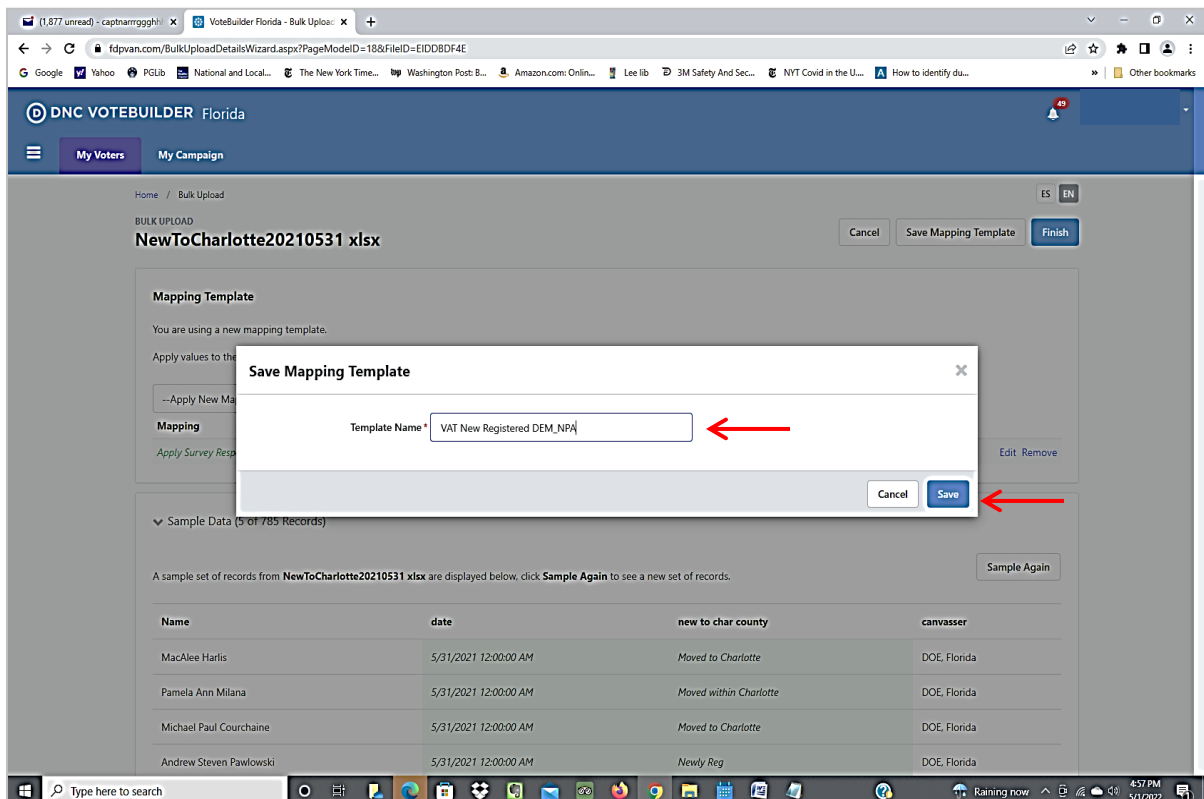
4A.8 On the **Bulk Upload / Mapping Template** page, CLICK **Save Mapping Template.**
In the pop-up screen, type in the name of your new Mapping Template and click **Save**.
In the pop-up screen, click "Finish Upload", then click **Finish.** Document the saved name of the mapping template for others on the data team.
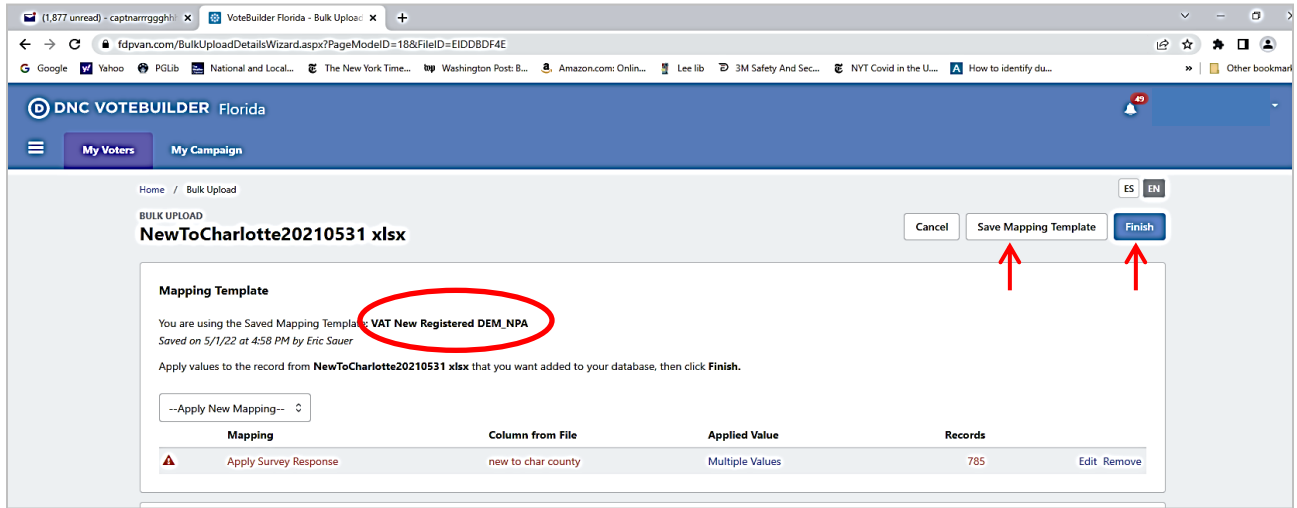
4A.9 The **Bulk Upload Batches** page will appear with the most recent Active Bulk Batches file at the top of the list, with the Count, Processed, Complete, Issues, etc. as column headers. CLICK **Refresh Results** until the **Processed** column indicates your upload is 100% Processed with 0 Issues. It should take less than a minute to process. The **Count** and number **Complete** should match**.**
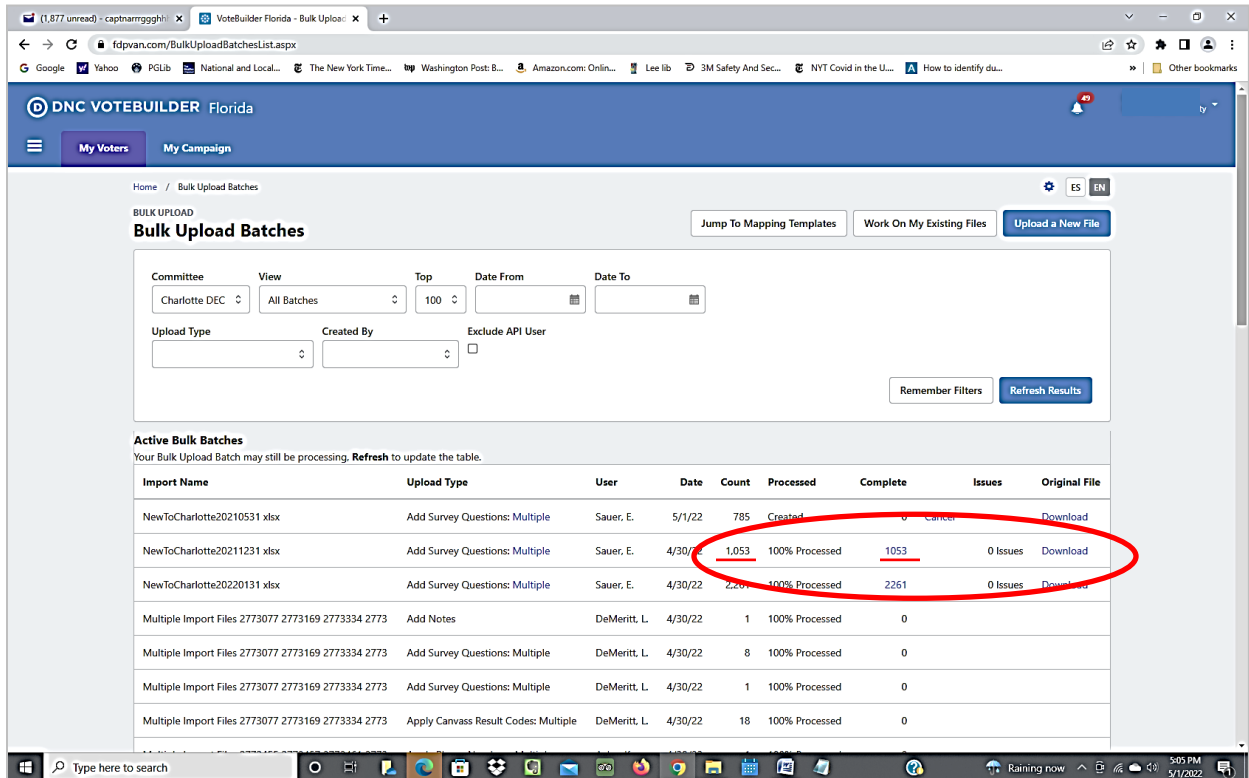
To verify that the VAT file was successfully uploaded into VAN, jot down a few voters' IDs and the reason why they are new, e.g., Moved to County. In VAN, conduct a Quick Look Up of those voters and verify they have the correct Survey Question responses associated with their names.

Step 4B. Repeat Uploads of VAT .csv Files Using a <u>Saved</u> Bulk Upload Mapping Template

4B.1 On the VAN **Main Menu** screen check that My Voters is highlighted. In the **Load Data** box, SELECT **Run Bulk Uploads**. From the dropdown menu SELECT **Upload New File.**

On the **Bulk Upload / Select Type** page SELECT **State File ID** as the mode to load data with.

CLICK **Next**.

B4.2 This will bring up the **Bulk Upload / Upload a New File** page. Select an entry for each item.

- **Mapping Template** - SELECT <u>Saved</u>
- **Saved Template Name** - SELECT the name of your previously saved Bulk Upload Mapping Template for this Survey Question (for this example: "VAT New Registered DEM_NPA")
- **File Source**: SELECT **Direct Upload**
- **Select a File** – CLICK **Select a File** and scroll to SELECT the .csv VAT file stored in your computer. The file name will show up by the **Select a File** box and next to **Import Name**.
- The **First Row** box will be shaded gray and inaccessible when a saved mapping template is selected.
- **Advanced** - CHECK the box to the right.
- CLICK **Upload.**
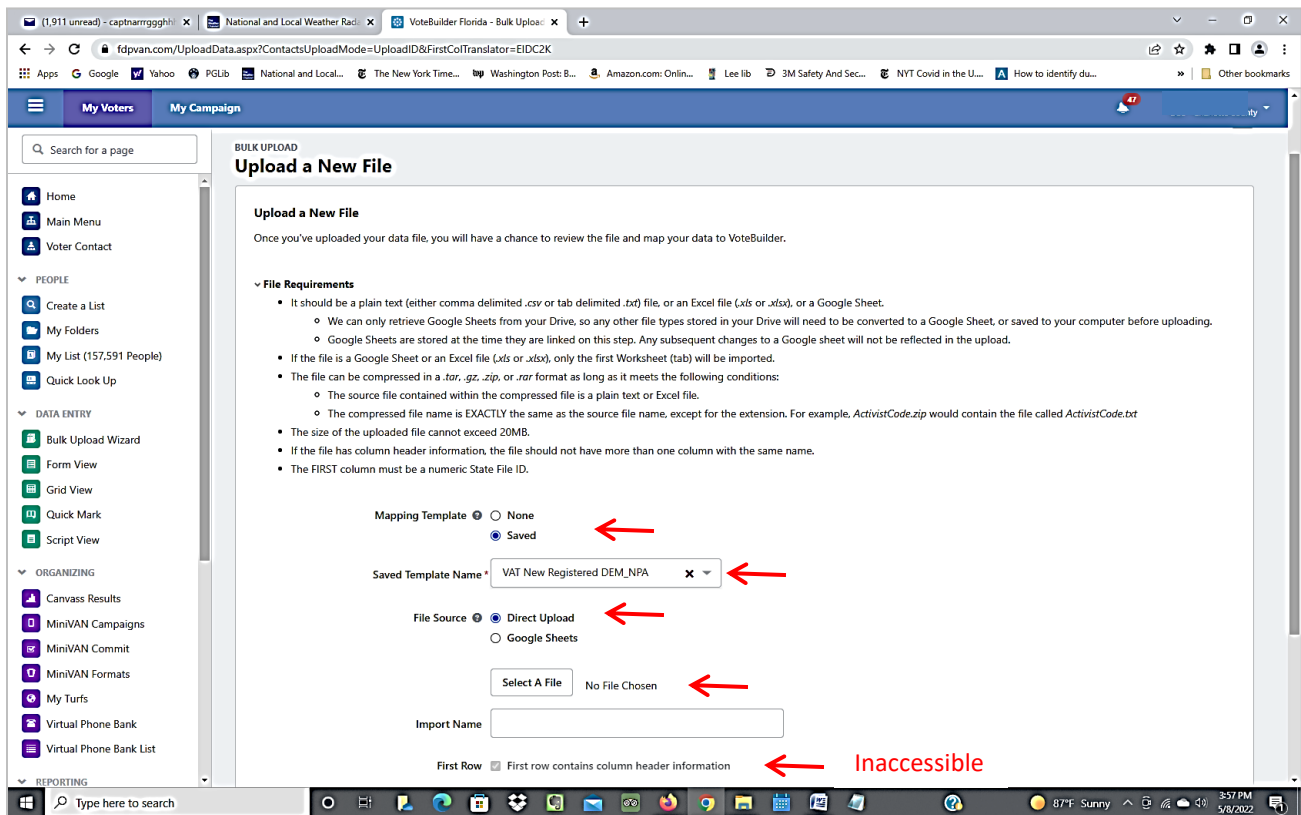
4B.3 The **Bulk Upload / Unmatched People Alert** page informs you if there are a large number of Voter IDs in the VAT spreadsheet that are not found in VAN. At times the updating of VAN data may take 6 weeks or longer. If there are a large number of unmatched people, wait to complete the upload until VAN has been updated with the FDOE data. This screen does not appear unless there are unmatched people.

4B.4. On the **Bulk Upload / Mapping Template** page verify you are using the correct *Saved* Mapping Template, then, CLICK **Finish**. In the **"**double check before continuing" pop-up screen, click "Finish" again.

4B.5 This will take you to the **Bulk Upload Batches** page that shows the latest Active Bulk Batches file at the top of the list, with the Count, Processed, Complete, and Issues as column headers.

CLICK **Refresh Results** until the **Processed** column indicates your upload is 100% Processed with 0 Issues. The Count of voter IDs should be the same as the Complete number. (**Note:** It is not necessary for the download to be "100% Processed" before starting on another file download.)

The Bulk Upload Batches page serves as documentation of when uploads have been completed and by whom. I may be useful to create additional documentation of the saved mapping templates and survey questions for others on the data team.

Note: To verify that the VAT file was successfully uploaded into VAN, jot down a few voters' IDs and the reason why they are new, e.g., Moved to County. In VAN, conduct a Quick Look Up of those voters and verify they have New Voter Survey Question responses listed under their names.

To upload additional VAT .csv files, click on Upload a New File in the upper right hand corner and repeat the process.

Note: It is useful for future data team use to document who has uploaded data, when, and the names of the Survey Questions and mapping templates created.