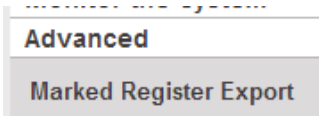
What	This Quick Sheet will show you how to add data from your Marked Register to Connect. It will show you how to export your base file, mark it up, and then import the data.
Why	To make your campaigning more effective in future, it is useful to know who does and doesn't vote. Storing the Marked Register in Connect will make it easier to prioritise your campaigning and maximise the use of your resources.
Where	The Marked Register Export button is in the 'Advanced' section of the left hand side of the Main Menu screen. The 'Bulk Upload' button is on the right-hand side of the Main Menu Screen. 

Creating your export your file

The first stage to adding your Marked Register data is to export a file from Connect. This file will include the VAN IDs and poll numbers of all the voters who were eligible to vote on Polling Day.

From the Main Menu, on the left hand side click 'Advanced' and then click on 'Marked Register Export.

The Marked Register Export Screen will then open. Here, you can choose your options for export.

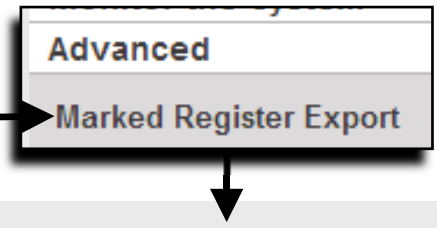
You can choose the Local Authority and Polling District(s) you wish to export. You can also select the file type, and specify a name for the export file.

It is important that you select the correct date in the 'Eligible as of' box. The dates refer to the updates made to Connect.

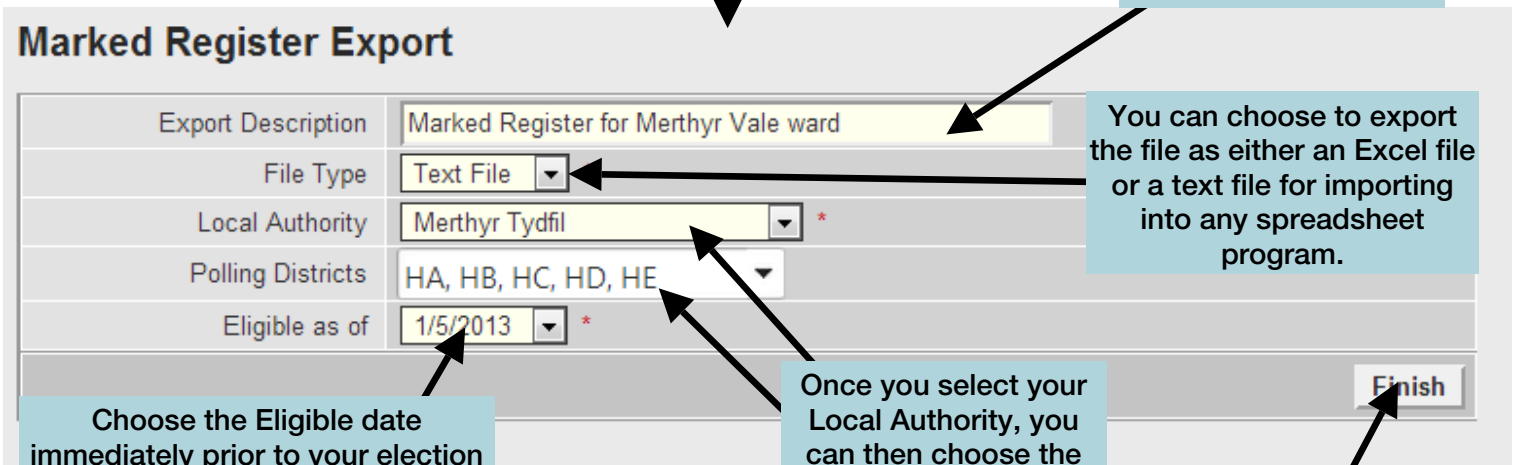
If your register was up to date for your election, then you should select the date immediately before your polling day. If your final update was not uploaded till later, you should select the date it was uploaded on.

When you have selected the required settings, click 'Finish' and your file will be available to download from the My Export Files section.

From the Main Menu screen, on the left hand side, click 'Advanced' then click 'Marked Register Export.



Enter your description here. This will form the basis of your download file name.



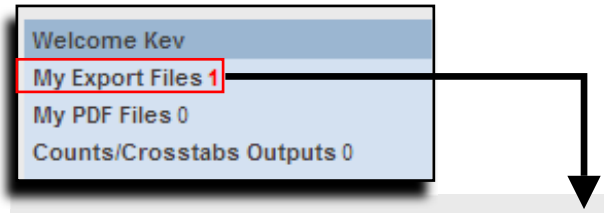
You can choose to export the file as either an Excel file or a text file for importing into any spreadsheet program.

Choose the Eligible date immediately prior to your election to ensure you only get voters who were eligible to vote.

Once you select your Local Authority, you can then choose the Polling District(s) that you require.

Click 'Finish' to create your file.

Downloading your export your file



To download the file, click on the 'My Export Files' link in the blue panel on the Main Menu screen.

On the Export files page, click 'Download File' and save the file to your computer.

My Export Files (available for download for up to 24 hours)

Export File	Exported	List Size	Record Count	Export Description	Download Link
MarkedRegisterforMerthyrValeward-12523020567.zip	9/5/13 9:35 AM	2,855		MarkedRegisterforMerthyrValeward	Download File

1 Export File · 1 Page

Marking the voted data

Once you have downloaded your file, simply open it in your preferred spreadsheet software.

The file contains columns showing each voter's Polling District, Polling Number, VAN ID and their name. There is then an empty column called Voted?

From the copy of the Marked Register provided by your Local Authority, simply mark the empty column with a consistent character (eg, the letter 'y') against each resident who voted. You should also request the marked register for Postal Voters from your Local Authority and mark those as voted as well.

If you cannot get this and simply wish to record that someone had a postal vote then you can mark those with another symbol, (eg, the letter p).

Please note - If you mark people as having had a postal vote you cannot update that data to show which postal voters did and didn't vote.

Leave those who did not vote as blank.

When you have finished, save the sheet as a csv file.

	A	B	C	D	E	F	G	H	I
1	LocalAuth	PollingDist	PollingNun	VAN ID	LastName	FirstName	MiddleNan	Suffix	Voted?
2	Merthyr Tydfil	HA	1	23358304	Morgan	Elizabeth			y
3	Merthyr Tydfil	HA	2	23358305	Manns	Denise			y
4	Merthyr Tydfil	HA	3	23358306	Manns	Steven	J		
5	Merthyr Tydfil	HA	4	23358307	Manns	Alice	G		
6	Merthyr Tydfil	HA	5	23358308	Davies	Thomas	L		y
7	Merthyr Tydfil	HA	6	49650135	Davies	Lee	N		y
8	Merthyr Tydfil	HA	7	23358310	Davies	Rebecca	R		p
9	Merthyr Tydfil	HA	8	23358311	Davies	John	G		p
10	Merthyr Tydfil	HA	9	23358312	Evans	Reginald			
11	Merthyr Tydfil	HA	10	23358313	John	Robert	F		y
12	Merthyr								

Simply mark the 'Voted?' Column for those who voted.

Uploading your file

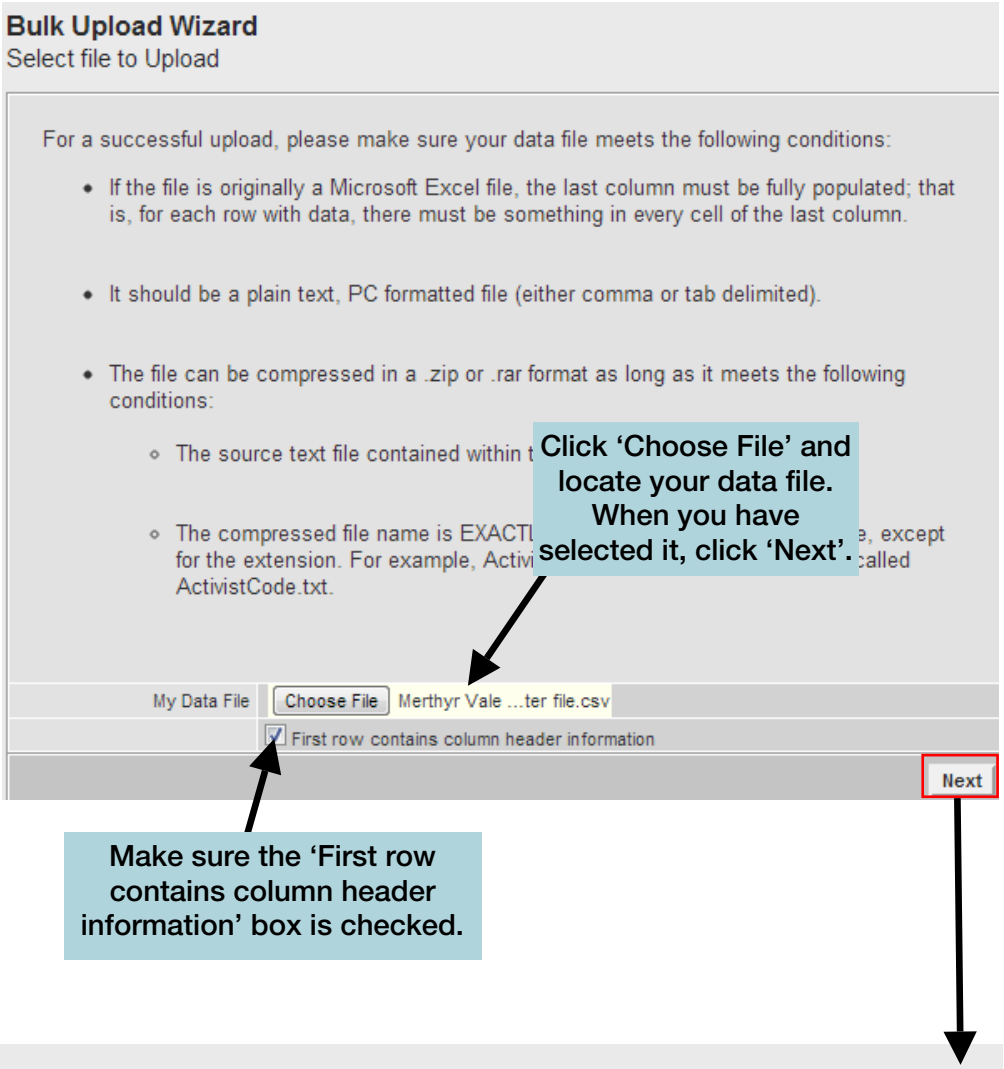
To upload your file, click on 'Run Bulk Uploads on the Main Menu and then click 'Upload a New File'.

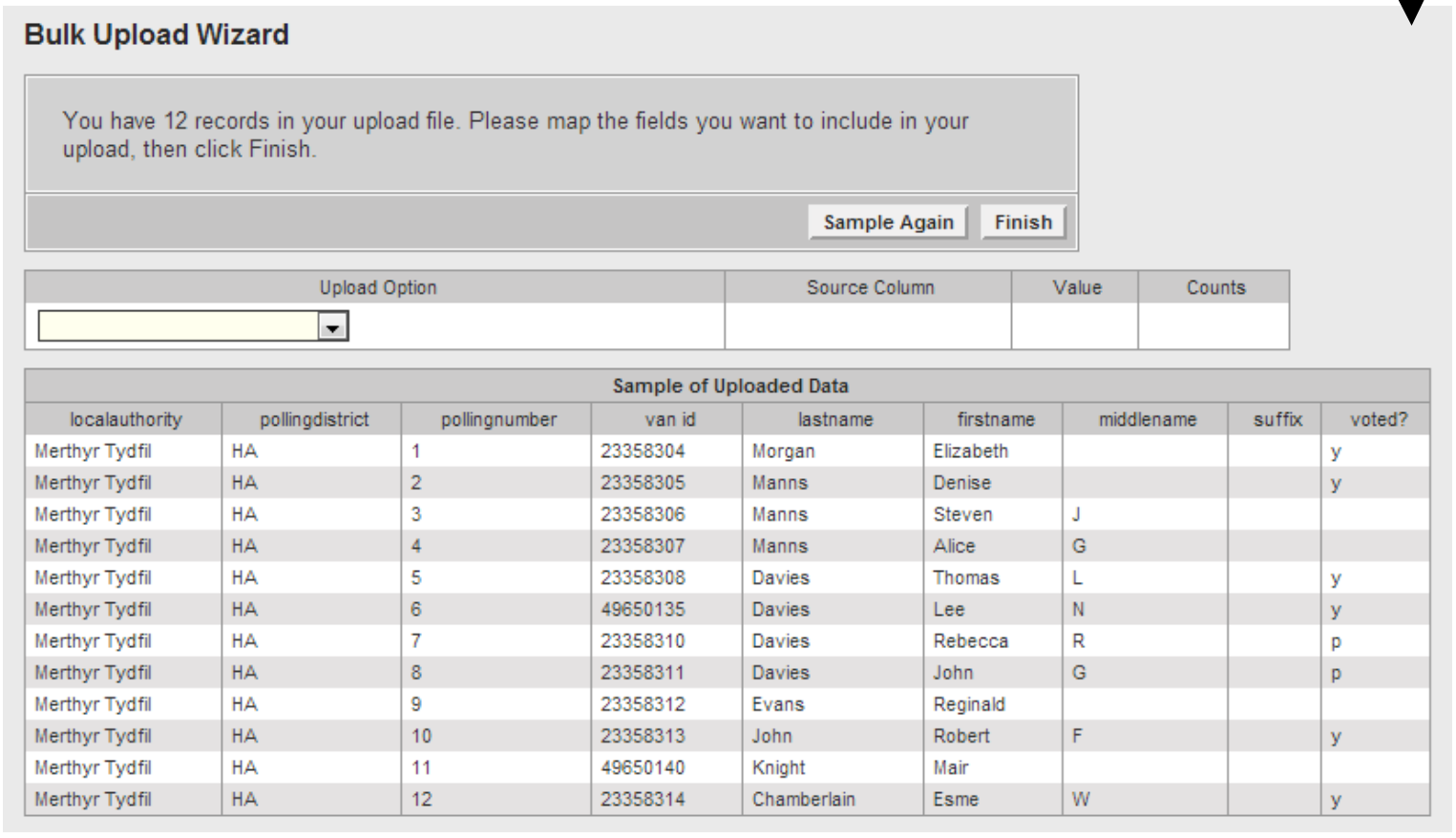
Click 'Choose File' to locate the saved Marked Register file. You must have saved the file as a CSV file.

Once you have chosen your file, make sure the 'First row contains column header information' box is checked.

Click 'Next' to upload the file.

Your file will then be uploaded, and a sample of the data will be displayed.



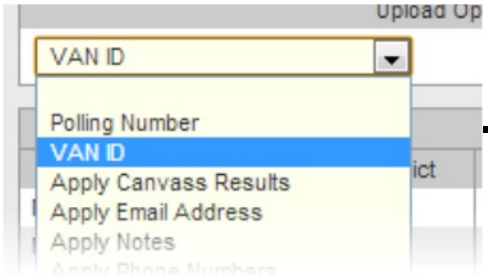


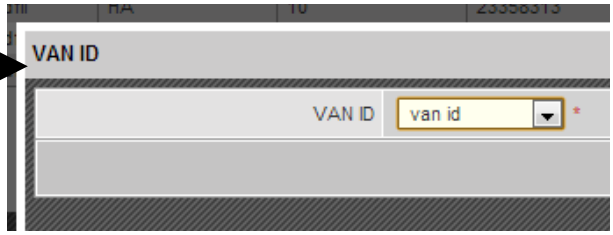
localauthority	pollingdistrict	pollingnumber	van id	lastname	firstname	middlename	suffix	voted?
Merthyr Tydfil	HA	1	23358304	Morgan	Elizabeth			y
Merthyr Tydfil	HA	2	23358305	Manns	Denise			y
Merthyr Tydfil	HA	3	23358306	Manns	Steven	J		
Merthyr Tydfil	HA	4	23358307	Manns	Alice	G		
Merthyr Tydfil	HA	5	23358308	Davies	Thomas	L		y
Merthyr Tydfil	HA	6	49650135	Davies	Lee	N		y
Merthyr Tydfil	HA	7	23358310	Davies	Rebecca	R		p
Merthyr Tydfil	HA	8	23358311	Davies	John	G		p
Merthyr Tydfil	HA	9	23358312	Evans	Reginald			
Merthyr Tydfil	HA	10	23358313	John	Robert	F		y
Merthyr Tydfil	HA	11	49650140	Knight	Mair			
Merthyr Tydfil	HA	12	23358314	Chamberlain	Esme	W		y

Match the VAN ID

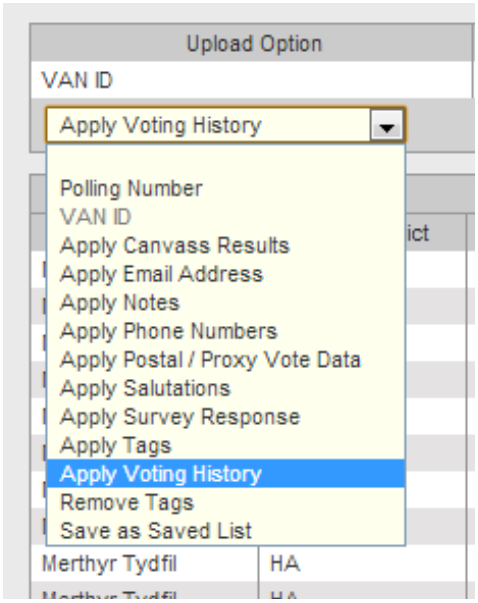
You need to tell Connect which column in your file contains the VAN IDs.

From the 'Upload Option' menu, select 'VAN ID'. In the pop up box, select the column called 'van id' and click 'Next.





Match the Marked Register data



Next you need to tell Connect how you want it to map the Voting History data.

From the 'Upload Option' menu, select 'Apply voting History'.

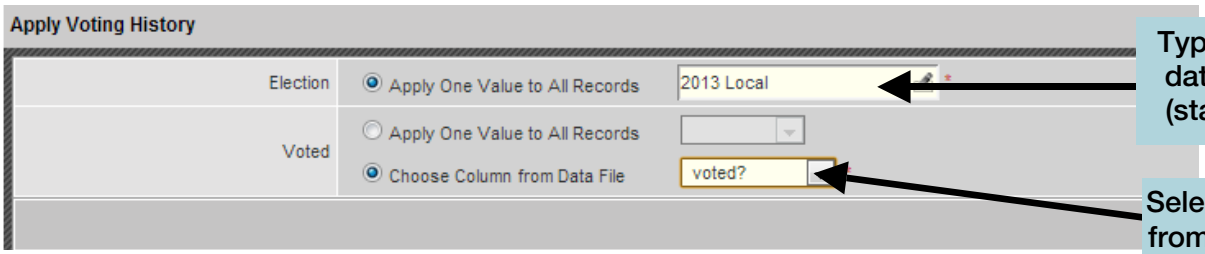
In the pop up box, you first need to select the appropriate election. Simply type the year of election and a range of options will be displayed for you to select. Use the up and down arrows on your keyboard to choose the correct election and a further 'Voted' section will appear.

Here, you must select 'Choose column from Data File' and pick 'voted?' In the drop down file.

Click 'Next' to load the matching screen. In the first column will be displayed the letters you used to mark people in your data file.

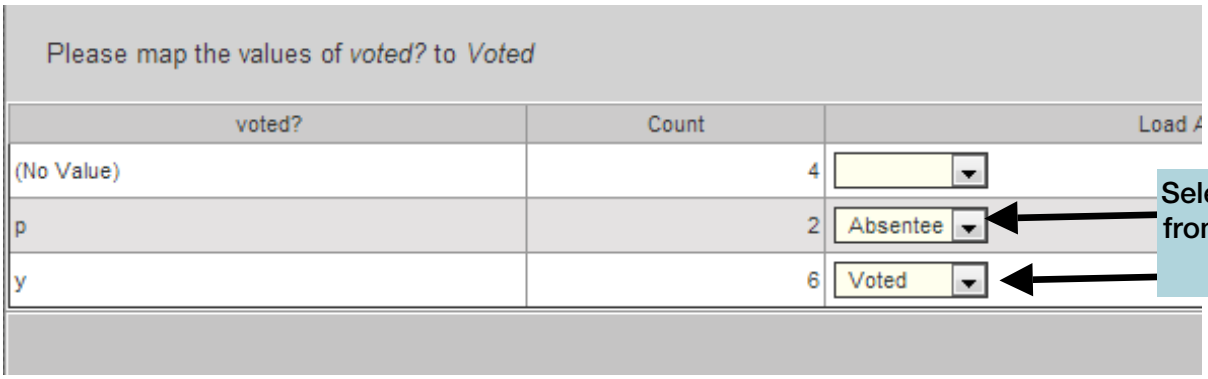
For each, simply select the data you wish that to relate to (either Voted or Absentee) in the drop down menus.

Once you have matched the VAN Ids and the Marked Register data, click 'Finish' on the Bulk Upload Wizard screen.



Type the election the data applies to here (start with the year).

Select 'Choose Column from Data file' and pick 'Voted?'.



Select 'Choose Column from Data file' and pick 'Voted?'.

Completing the match

Once you have matched the data for the Marked Register input, you will need to complete the match.

To do so, return to the Main Menu, click Run Bulk Uploads and then click 'Administer Bulk Upload Batches'.

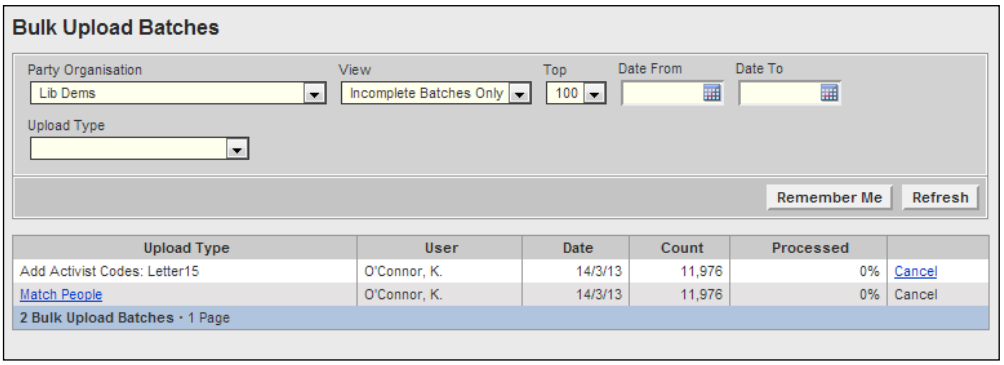
You should then see your upload on the screen. There are links to cancel your upload if you have made a mistake.

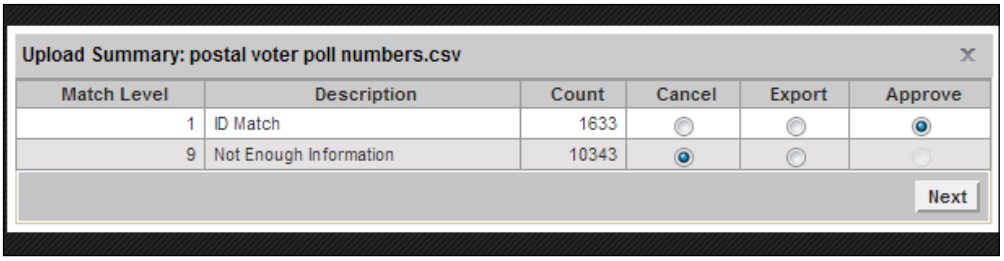
You need to click on the 'Match People' link on the left hand side (if this isn't a link, wait a minute or two then click refresh).

Connect will show you how many of the uploaded records it has matched to voters in the database. You can then choose to export back out the records that did not match.

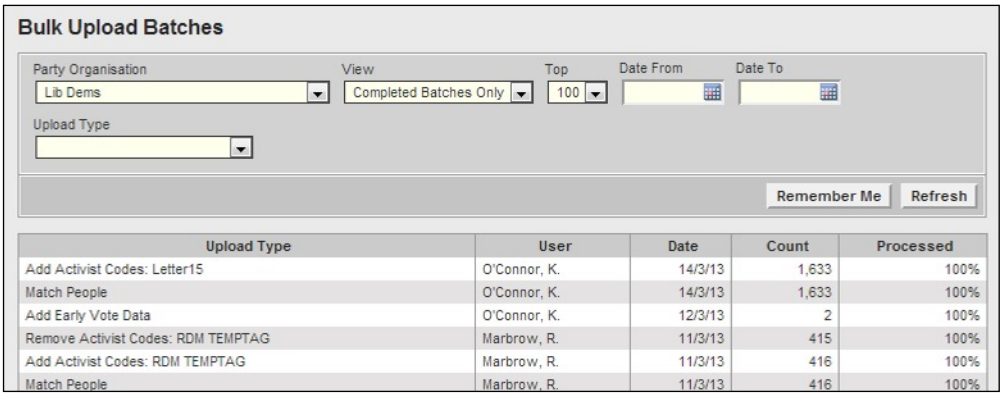
Click next then approve the processing of the next records.

You can then check the progress of your upload on this screen. The 'View' drop down box at the top will allow you to see completed batches instead or as well as incomplete ones.









Keep on learning - these Quick Sheets will build on what you have learnt here:

Section 6 - Walk Manager	Learn how to organise your area in to Walks for delivery sheets and printing canvass cards.
Section 7 - Phoning	Learn how to use the Virtual Phone Bank to make calls to voters and enter the data directly in to the system.

Watch training videos at Member.LibDems.org.uk/Skills
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