

# VLO → MY FILES

## VLO TEMPLATES

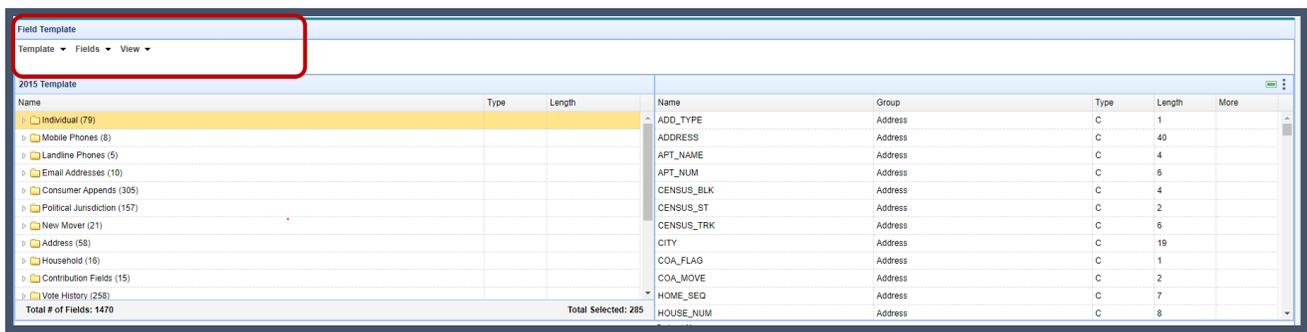
**A Template defines the fields that will be included in the file you download from VLO**

- **Every newly created account comes with a Default Template named “Default”**
  - The default template includes the most common fields found across all states voter files
    - Individual Data points like name, address, mail address, party, registration date, Birthdate (populated where available), age, ethnicity, Congressional District, State Upper and Lower Districts, recent vote history and some of our demographic fields
    - Total number of fields in the VLO default is 254
    - A field may exist on the file but be blank – example: Precinct Name is included in the default template but not all states have precinct names.
  - The Default can be renamed as well as have fields added/subtracted from it.
- **Each Users account can have unlimited number of Templates**
  - Each template can have its own set of included fields
  - Only 1 template can be set as the DEFAULT
    - The default is used when downloading a file unless another template has been selected at download
- **Templates can be shared with other members of a Group**
  - Aristotle staff can share templates with clients or other staff
- **When first landing on your My Files page you will be presented options at the top of the page that are shown in the image below**
  - FIELDS TEMPLATE – displays default template
  - FORMAT – displays CSV/Excel unless you have used the SET AS DEFAULT button to make another option your default (other data output formats are DBF, Tab Delimited; Paper output options are also available)
  - OUTPUT ORDER – for data output only you can output in Paper output order (walklist, call list )
  - DISPLAY – manages the number of files displayed per page
    - Options from 10/page to 100/page
  - LIST FILES FOR – selection sets the files that are included in display
    - Varies from Last 7 days to ALL
  - SHOW ARCHIVED FILES – checkbox – when checked files that have been archived (hidden from view) will be included in display
    - Archiving files can help with your list management. Hiding files you decide not to purchase or have purchased and do not need to see any longer.

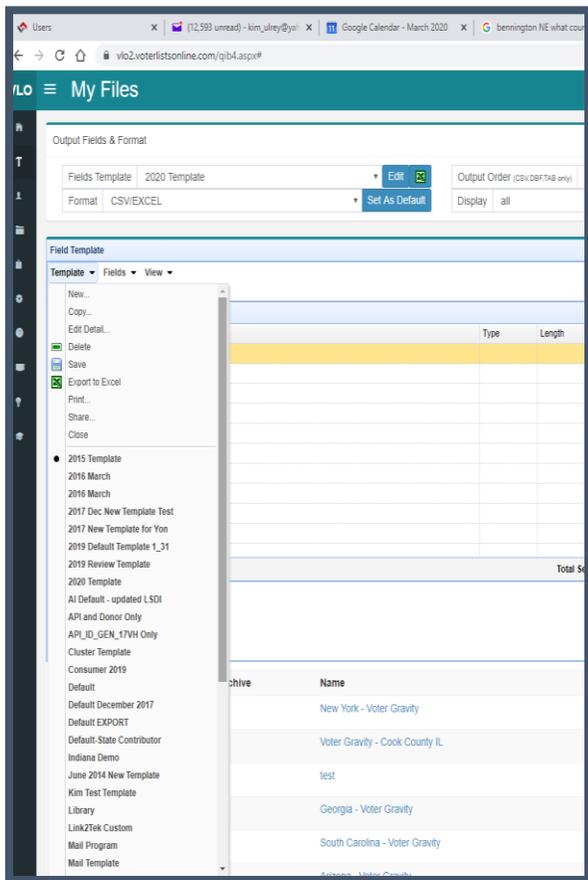


- **The Midsection of your My Files page provides tools for Selecting and Editing your Templates**

- Top left menu options are
  - Template
  - Fields
  - View
- Template Detail Display – midscreen
  - The screen below the Menu options is divided into two parts
    - Left side lists the GROUPS of fields available and the number of fields within each group
    - Right Side lists the Fields currently included in the Template that is selected
  - The selected Template can be edited from this location



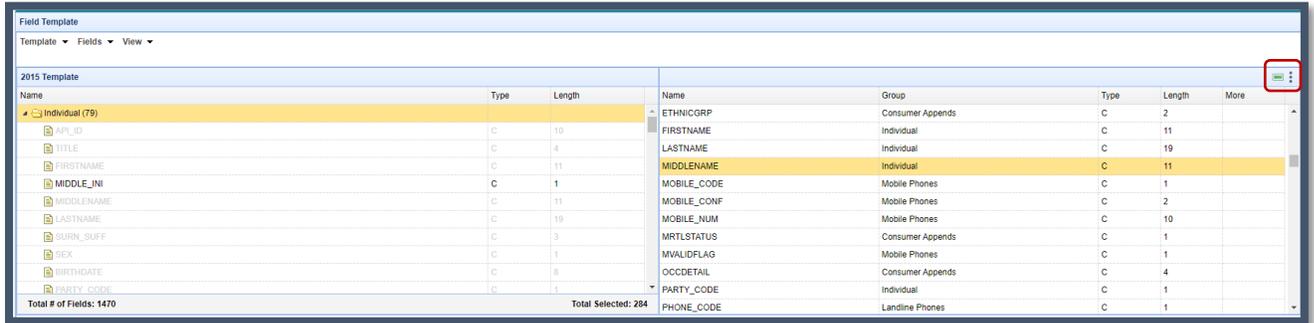
- **Template Drop Down menu options**



- **New** – user can create a new Default
- **Copy** – user can copy a current template to create a new template
- **Edit Detail** – user can edit the Template Name, add a description and Set the template as the Default by checking the Default box and clicking OK
- **Delete** – user can select a template to delete. This is non-reversible
- **Save** – saves any changes made to the selected Template
- **Export to Excel** – selected template output to excel
- **Print** – outputs the file layout for selected template to browser for printing
- **Share** – is the tool for sharing with other users in the group. The user needs to know the recipients username
- **Close** – closes the menu
- At the bottom of the menu options is a list of all the users Templates. Users can select any of these templates to edit /delete

- **Editing a Template**

- Make sure the name of the Template you want to edit is displayed in the Blue Bar under the Field Template menu options
- Left side menu lists the Field GROUPS – click the small arrow icon to the left of the Group you want to use. This will display a list of included fields
- Right Side menu lists the fields included in the template and its position in the layout (the order in which the data will be exported)



- **To Add a field** to the template (include a field in the template)
  - Users should use their mouse and click/drag the field from the left menu to the right menu
  - The users mouse can be used to drag the field up or down on the left side list as well.
  - When a green check mark appears release the click
- **To Remove a field** from the template
  - Highlight the field on the right side list with the mouse cursor
  - Click the green minus sign found in the upper right corner in the blue band (circled in red above)
- **To Change the output order** of the Template fields
  - On right side list highlight the field to move with the mouse and click/drag to the new location
- **REMEMBER TO SAVE**
  - Use the Save option found on the Template dropdown menu

## SPECIALTY TEMPLATES

- Occasionally the Aristotle team will build specialty templates for clients under contract
  - These templates include customizations on the values found in the output fields
  - These templates should not be edited by the clients. The nonstandard fields cannot be edited and editing the standard fields could cause a issue with the customized fields
- Clients using VLO who are also **NATIONBUILDER** clients will have a customized template provided to them upon request
  - Using the NATIONBUILDER Template directs the VLO system to send 2 or 3 emails with file attachments to the users email address
    - Email/File 1 – “People” – in the Nationbuilder format which can be imported by the client directly using the Nationbuilder import tool
    - Email/File 2 – “Vote History” – in the Nationbuilder format to import using the same import tool once the “People” have been imported
    - Email/File 3 – this will include Email addresses for imported people IF emails have been included in the VLO file. Email addresses are a unique key within Nationbuilder so in cases where voters share an email address it will be appended to only one of the records within the clients Nation.