# Guidelines for Filters, Lists, and Tags

## Contents

# Purpose

This document serves as a guideline for the creation, use, and maintenance of the following NationBuilder features: Filters, Lists, and Tags (FLaT). These features are used to group and identify DA members based on certain criteria defined by the IT Team and admins who have membership certification. Once created, they can be used for email blasts, membership data studies, etc.

# Naming Convention for Filters, Lists, and Tags

Naming Conventions have been created to make it easier for you and others to find FLaTs. They also help with removing them once they are obsolete.

Below are some general naming convention guidelines.

## Naming format

To make things easier, a prefix has been defined for each country and global group to use. You can find the List <u>here</u>.     If the item is for a specific date or year, that should be included in the name. If you have many that are of a similar type, like RSVP or GOTV, you may want to include that.

For example, use 2023-DADE-RSVP-Oktoberfest for the RSVP(type) for 2023 (date) for DADE (Germany) followed by Oktoberfest (the unique descriptor).

## Prefix for Countries

The prefix is 'DAxx' where 'xx' is the ISO code. The reason for this is many of the ISO codes are the same as for a US state (like CA). For a chapter, they should use the country prefix followed by the name or abbreviation for their chapter.

For example, use DADE for Germany and DADE-Munich for the Germany Munich chapter.

## Prefix for State Teams

The prefix for the state teams is xx-ST where xx is the 2 character state abbreviation.

For example, use TX-ST for the Texas State Team.

## Prefix for Caucuses

The prefix for the Caucuses is the normal abbreviation that they use.

For example, use GWC for Global Women's Caucus.

## Prefix for Other Global Teams

A unique prefix has been defined for all the other global teams, where possible the abbreviation the team uses.

For example, use TTF for the Taxation Task Force.

# Filters (Saved Filters)

## What Saved Filters are

Filters are a way to search for members based on a set of simple or complex criteria.

Here are few useful examples you can use to find members who:
- o   RSVP'd for a certain event:   Filter Criteria = Has rsvpd (specific event)
- o   Are emailable:  Filter Criteria =  is emailable / is not emailable
- o   Used VFA in a certain year:  Filter criteria = Tags (multiple) : VFA yyyy

You have the option to save the Filter for future use.  Saved Filters are dynamic, that is, the results change as the data in the database changes. If you create a Filter for RSVPs to an event, the results will change automatically as people RSVP or cancel an RSVP for the event.

## How to use Saved Filters
A Filter can be used to do several things, including, but not limited to:

- Finding the number of people who meet certain criteria, e.g. how many members vote from Texas
- Finding members who meet certain criteria in order to perform other actions, e.g. approving new members
- Sending a blast email to everyone meeting the criteria
- Adding all people meeting the criteria to a List, see below on using Lists
- Requesting Help Desk to send an extract of a subset of your members

## When to create Saved Filters
Saved Filters are helpful when you or others frequently need to look at the current members who meet certain criteria. They can also be used for blast emails or to send to helpdesk@democratsabroad.org to receive an extract of those members.

## When not to create Saved Filters
You should not create a Saved Filter if it is a one-time search.

You should not create a Saved Filter if there is already a Saved Global Filter that meets your needs, in particular, there are already Filters for everyone who votes in each state.

Saved Global Filters are created by the Global IT Team.
- These Filters are available for use for membership searches or emailing.  For example, Receive Local Emails is an IT-created Filter that identifies members who opt-in to receiving local email.
- When you run these Filters at the CC or Chapter level, the results will be limited to your CC or Chapter.
- If you choose to save a global Filter at the local level, be sure to use "Save As" and give the Filter a new name following the naming convention.  It's nevertheless recommended to just use the global Filter and not create a specific local one, unless you have a pressing need to.  In any case, do not rename or modify the global Filter.

## When to delete Saved Filters
The Filter should be deleted once it is no longer needed.  For example, if the Filter is used to send a one-time email, once the email is sent, the Filter should be deleted.

Please note, you should only delete Filters that you or your group have created.  You should never delete a Filter that was created by the IT Team or any other group.

# Lists
## What Lists are
Lists are a way to assign a set of members to a named grouping.  Lists are normally a one-time snapshot of members that meet some criteria.   However, individual members can be added or removed from a List.  Unlike Filters, they never change automatically based on a member's attributes changing.  For example, if you create a List of everyone who votes in Texas, the List is the same a year from now even if you had new members from Texas join or a member changed their voting address.

## How to use Lists
A List can be used to do several things, including:

- Making mass updates to a subset of members.  For example, you can mass add or delete Tags from everyone on a List.
- Sending an email blast, although if you have a Saved Filter, that is better to use.
- Requesting Help Desk to send an extract of a subset of your members when it needs to be based on a situation at the time the List was created, otherwise a Filter is better.

## When to create Lists

The main reason to ever create a List is to do mass updates to a group of members.  You also might want to create a List of members to contact and remove them from the List as they are reached.

The easiest way to create a List is based on Filter results.  However, members can be added to and removed individually from a List.

## When not to create Lists

When you want a current, dynamic group of members, a Saved Filter is usually better and no need to make a List.

## When to delete Lists

Lists should be deleted as soon as they are no longer needed.   In most cases, this is the same day they were created, unless you are reusing the same List on an ongoing basis.

# Tags

## What Tags are

Tags are attributes that can be added to a member's record.

## How to use Tags

A Tag can be used to do several things, including:

- Sending an email blast - note that several Tags can be Listed together as criteria for recipients of an email for any that have one or more of the Tags
- Finding members based on the attribute that the Tag represents

## When to create Tags

Tags should be added when there is a need to add an attribute to a member and there is no other indicated.  Note that there are many Global Tags which are accessible for admins to use.  For example, "VFA yyyy" is one that is assigned based on the year that a member used VFA.

## When not to create Tags

Tags should not be added if there is another way to find the same member.   For example, there is no need to Tag a person with "TX voter" since you can find all the Texas voters based on the members' registered state of Texas.

There is no need to create a Tag that duplicates an existing Global Tag.  For example, there is no need to Tag someone with 'DE-yyyy-VFA' since Germany can use the Tag "VFA yyyy" and get the same results.

If you are never going to have more than one person with the Tag, like DE Chair, there is seldom a reason to create the Tag.

## When to delete Tags

You should delete a Tag when it is no longer of value.  However, if you have more than 25 people with the Tag, you should first do a Batch Update to remove the Tag from all members before deleting the Tag.  If unsure about how to delete, please send the request to Help Desk.

# Comparison Table

| Filter, List, and Tag Comparisons | | | |
|---|---|---|---|
| | Filters | Lists | Tags |
| Naming Convention Applies | X | X | X |
| Dynamic. The results change as the data changes. | X | | |
| Used to identify email blast recipients | X | X | X |
| Can be used in Filters | | X | X |
| Results can be exported or used to create a List (requires IT support to perform the export) | X | X | X |
| Used for batch updates | | X | |
| Should be deleted when processing is complete | | X | |

# Documentation & Training Materials

**Naming Convention Table** including the Donation Slug, Tracking Code and FLaT Prefix ID can be found here.

**DA Training materials** are located on the wiki and can be found here.

**NationBuilder general explanation** articles can be found here.

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