ADDRESSES & ADVANCED FEATURES

WISVOTE WEBINAR: TUESDAY, SEPTEMBER 13, 2016

I. Introduction

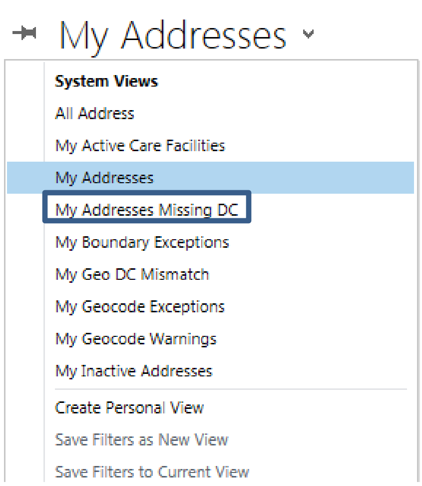
II. Addresses

a. District Combos

i. Defining the District Combo: HINDI + Ward + School District + Split = DC

ii. View My Addresses Missing DC

On the page showing My Addresses, use the chevron to see all the view options. Click My Addresses Missing DC to see a list of addresses with no DC.



iii. Adding a District Combo to the Address Record

Click on the Address in the list. Move the pin to the correct location. When the District Combo is set, click Save & Close.

iv. Related Views

1. Geocode Warnings
2. Geocode Exceptions
3. Boundary Exceptions

b. Annexations

i. Submit an EL-100 to the WEC

ii. Any Annexation that crosses a district boundary must create a new ward

iii. Voting machines must be programmed with the same wards that are in WisVote

iv. Adding Annexations to WisVote

1. Priority is given to annexations that impact voters
2. Notify the Elections Help Desk of annexed residences

c. Address Outside the Jurisdiction
    i. Contact the Elections Help Desk for assistance when receiving this message
d. Duplicate Addresses error
    i. Due to Address Validation error/mishap (Address is changed during the validation process)
        1. Click Cancel
        2. Change the address back to the correct address
        3. DO NOT PROCESS AGAIN – just Save & Close
    ii. Due to an Inactive Address (this is most common)
        1. Search for the Address
        2. Open the address record
        3. Activate the address record
        4. Confirm pin is in the correct location and that there is a district combo code
        5. Save & Close
e. New Addresses in MyVote – Changes to how Addresses function in MyVote
    i. Less “touchy” about how the address is entered
        1. System will accept and standardize the street type (Ave, AV, Avenue)
        2. Punctuation will no longer cause problems
        3. Less likely to return a “wrong” address
    ii. MyVote Webinar scheduled for Wednesday, September 14, 2016
f. Address Wrap-Up
    i. Address issues you can fix yourself:
        1. No District Combo
        2. Address Warnings and Exceptions
        3. Inactive Addresses
        4. Missing Addresses
        5. Typos & Misspellings
    ii. Address issues to be referred to WEC
        1. Address in wrong jurisdiction
        2. Recently annexed addresses
        3. New wards
    iii. Address Tips
        1. Before entering your EL-131s, check the addresses to be sure they are in WisVote and are active
        2. When you click Process, WisVote will try to validate the address; this may make changes to what you’ve entered
        3. Whatever is in WisVote is what is displayed in MyVote

III. Advanced Features

a. When to Use Advanced Features

i. 3 ways to retrieve data/lists from WisVote

1. Voter Search

a. Advantages

i. Easy to use

b. Limitations

i. Only displays 10,000 records (this is true for any associated view lists as well)

ii. Limited column options

iii. Columns must be reconfigured every time

2. Standard Reports

a. Advantages

i. Easy to use

ii. Formatted to fit letter-sized paper for printing

b. Limitations

i. Locked into the standard format

ii. Limited to filters that are already included for the report

iii. Customization must be done in Excel

3. Advanced Find / Create Personal View

a. When to use:

i. Print a list containing more than 10,000 records

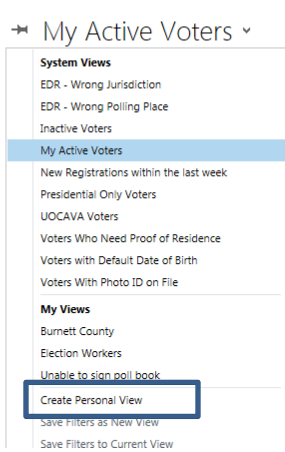
ii. No standard report is available with the desired filter and columns

iii. The specific filters and columns are those you'll want to use again

b. Create a Personal View

i. The Advance Find Window is accessed by clicking:

1. Create Personal View in an existing View menu



      2. Advanced Find icon 

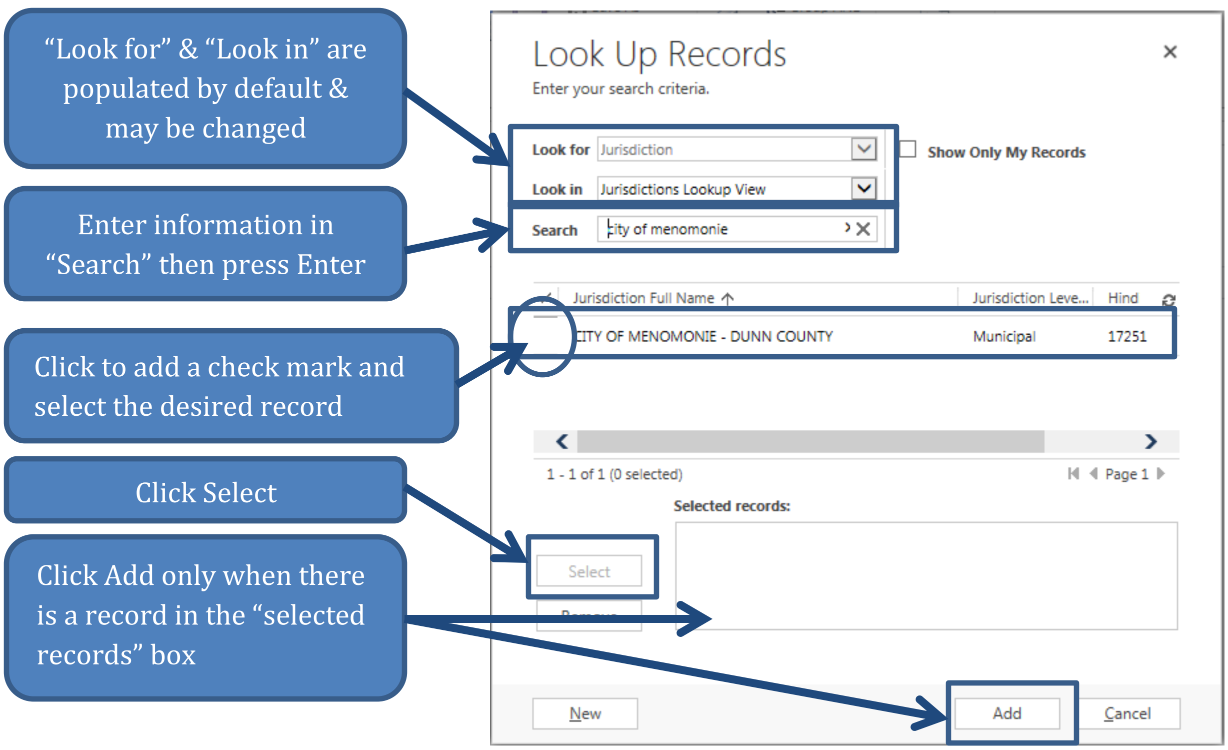
   ii. Starting out
      1. Make sure the "Look for" field is correctly set.
         a. Defaults to the record type of the current view if Create Personal View is selected
         b. Defaults to Absentee Applications for "neutral" pages
         c. Defaults to the current view if  is selected from a current view page
            i. In this case, the Use Saved View field is also populated by default
            ii. To edit filters you will need to change the "Look for" record type to something else, then switch it back
      2. Most common "Look for" record types:
         a. Absentee Applications
         b. Absentee Ballots
         c. Addresses
         d. Election Participation
         e. Generate Reports
         f. Voters
   iii. Setting Filters
      1. Defaults – default filters are set depending on the record type selected in the "Look for" field
         a. Most common default setting is Owner Equals Current User or User's Team. This setting will return records only for the currently selected jurisdiction (i.e. for a provider clerk, it will be the jurisdiction you are currently using)
         b. Default filters may be deleted or changed
      2. Selecting filters
         a. Field vs. Related
            i. Fields are filters and will include all of the information that is directly entered into the record type. For example, if the "Look for" is Voter, all of the fields will include information that has been entered into the 131 form or is available to edit on the Voter record.
            ii. Related options are not filters, but rather a pathway to find additional filters. For example, the District Combo is displayed on the voter record but it is not entered on the voter record; therefore, it will not be available under

Fields. Choosing the Home Address from Related will allow a path to select District Combo as a filter.

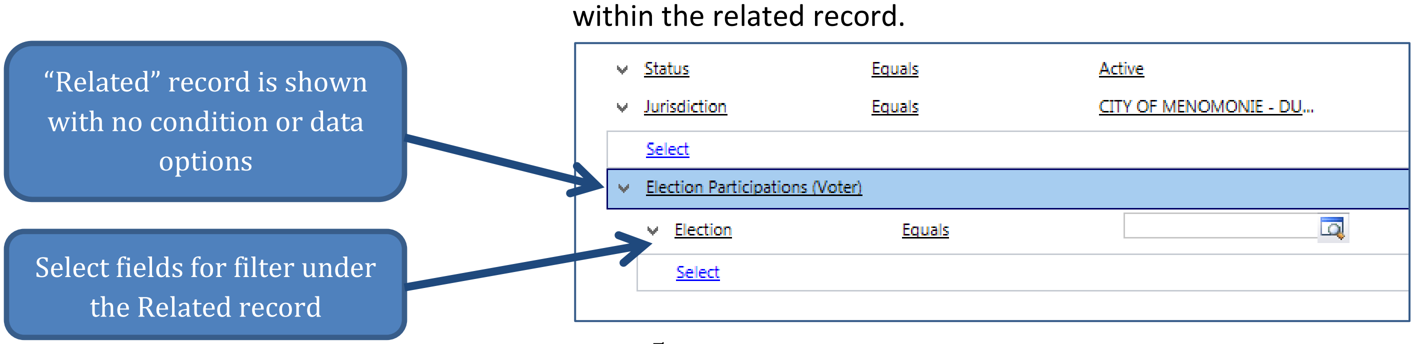
b. Some options will appear in both Fields and Related. For example, Home Address is available as a field (for filtering) and as Related (in order to provide more filtering options)

c. To set a filter requires:
   i. Select a field (e.g. Jurisdiction)
   ii. Select a condition (e.g. Equals)
   iii. Enter (Look Up) a Value (e.g. City of Menomonie)

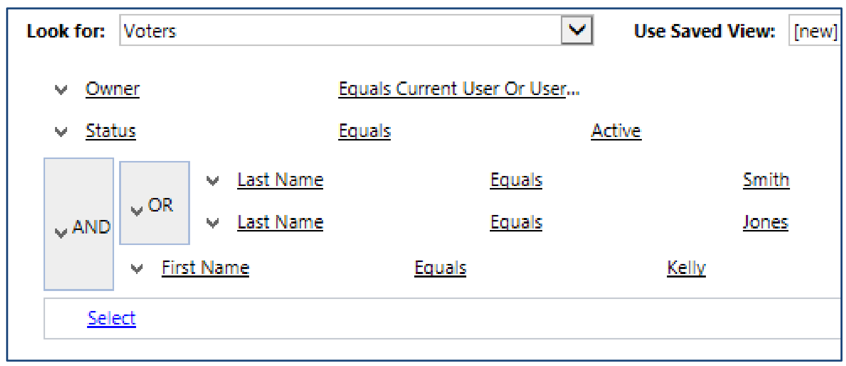
d. Using Look Up Records



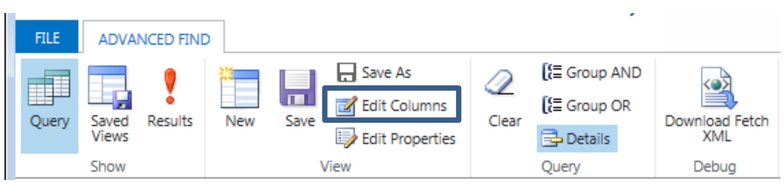
e. Add a filter from a "related" record
   i. Select the "Related" record from the list
   ii. Click Select under the related filter to choose a field within the related record.



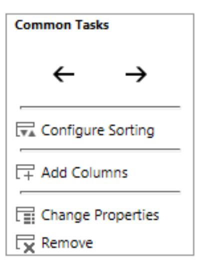
3. Grouping Filters
    a. Default – by default, every filter is treated as an "and" function. For example, the Owner is set to Equals Current User & User Team AND the Status is set to Active. The results found will be for records that meet both of these conditions.
    b. Grouping can be used for specific filters or for groups of filters
    c. Using the Group options
        i. Click the chevron to the right of each filter or group to be included
        ii. Click Select Row (or Select Group)
        iii. Click Group AND or Group OR in the tool bar at the top
    d. The Group features may be used in several layers. In this example, the filter is for a voter with the first name Kelly and the last name of either Smith or Jones.



iv. Edit Columns



1. Defaults – the column defaults will depend on the record type.
2. Menu – the menu is displayed on the right side of the page

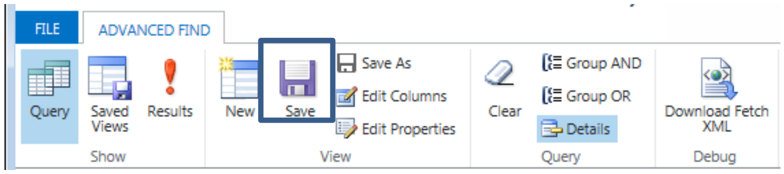


3. Remove – begin by removing any default columns that are unwanted
    a. Click the column header so it is outlined in green

b. Click Remove

4. Add
   a. Record Type and Column Options
      i. Record Type is similar to the “Look for” and “Related” options we saw in filtering
      ii. Record Type defaults to the same type included in the “Look for” field.
      iii. Options will include anything related to or shown on the Record Type. For example, District Combo is included in the options for Record Type: Voter; however, if the District Combo is selected here, this column will never show data because District Combo on the Voter Record is a display only field (it is displayed on the voter record but can only be added or edited on the Address record)
      iv. When the Record Type is changed, the available options are also changed
   b. Adding a column
      i. Click Add Columns
      ii. Select all desired options under the default record type
      iii. Click OK
      iv. To add columns from other Record Types
         1. Click Add Columns again
         2. Change the Record Type
         3. Select options
         4. Click OK
         5. Repeat for each Record Type
5. Position – Once the columns have all been added, click on a column header (it will become outlined in green), then use the positioning arrows to move the column left or right. Do this for as many column headers as necessary to create the desired order.
6. Configure Sorting
   a. Set the default sorting option for the saved view or report
   b. Only columns which were added from the primary Record Type (same as the “Look for”) may be selected as the primary and secondary defaults for sorting.
   c. Sorting by any columns selected from any secondary record type may only be done once the report has been exported to Excel
7. Click OK to save the changes to the columns

v. Save

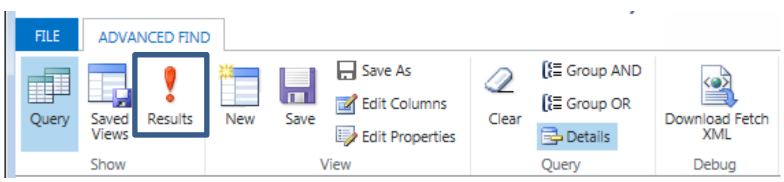


1. Use Save to save the view. It will display in the Views menu for the list associated with the “Look for” record type. For example, if Voter is in the “Look for” field, the saved view will be available on the Voter List page
2. To Save:
    a. Click Save
    b. Enter a Name descriptive enough so that you will remember what the view is for
    c. Leave Description blank
    d. Click Ok
    e. Exit out of the Advanced Find window using the red X at the top right corner. (TIP: Exit even if you have other things you want to do in Advanced Find, then just re-open it.)

c. Run a “One-Time” Report

i. Follow steps for creating a personal view with regard to Filters and Columns

ii. Click the Results button



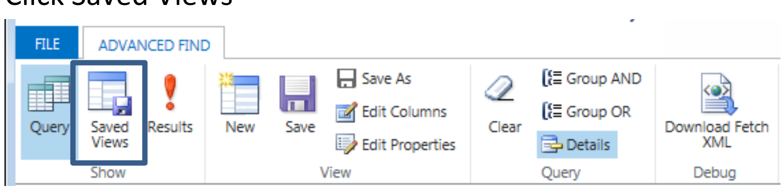
iii. Export Voters

1. Export to Excel
2. Report must be exported to be printed

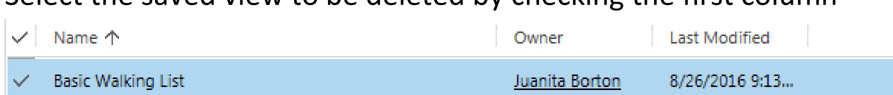
d. Delete a Personal View

i. Open the Advanced Find window (use the icon or the Create Personal View option)

ii. Click Saved Views



iii. Select the saved view to be deleted by checking the first column

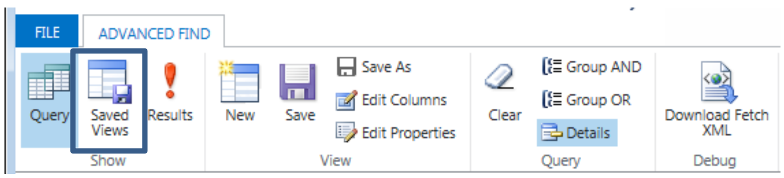


iv. Click Delete Saved View

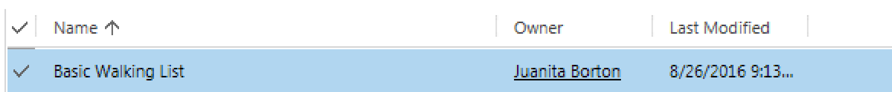
e. Share a Personal View – allows user to share a personal view with other users

i. Open the Advanced Find window (use the icon or the Create Personal View option)

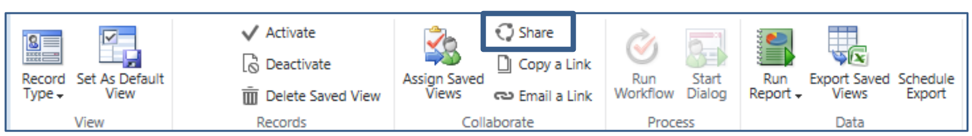
ii. Click Saved Views



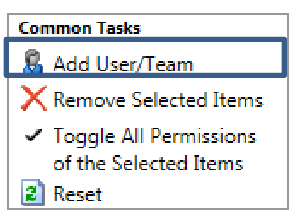
iii. Select the saved view to be shared by checking the first column



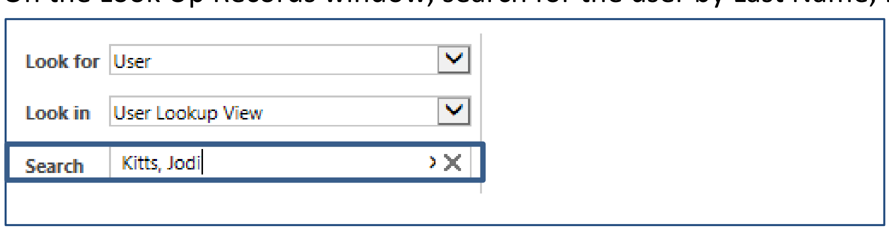
iv. Click Share



v. Click Add User/Team on the Share saved view window

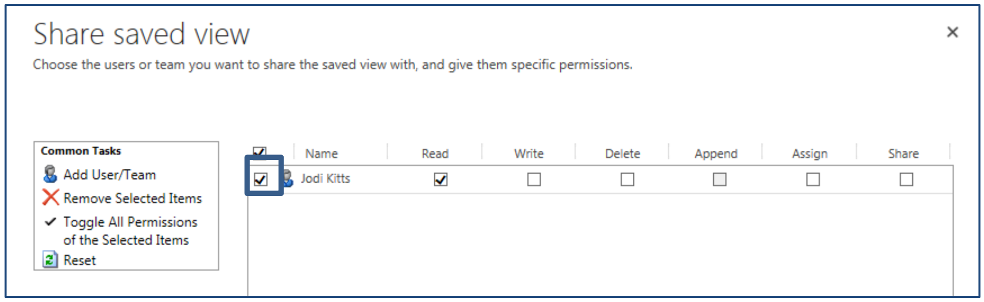


vi. On the Look Up Records window, search for the user by Last Name, First Name



1. Select the user by adding a check in front of their name
2. Click Select
3. Click Add

vii. When the user appears in the Share saved view window, check the box in front of their name



viii. Click share

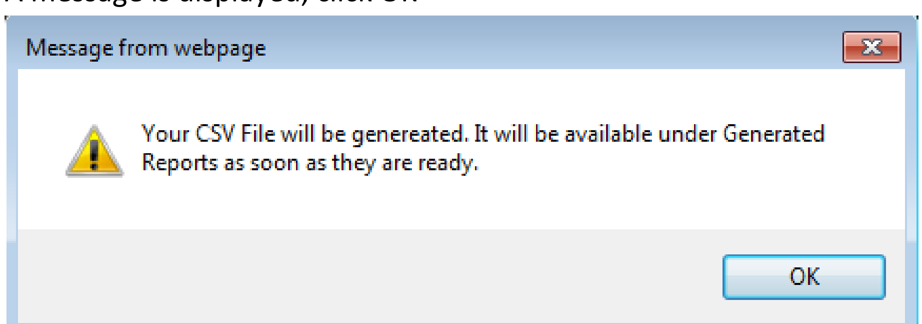
f. Schedule a Report

i. Open a saved view or create a new report/view using the instructions for filtering and editing columns

ii. Click Results

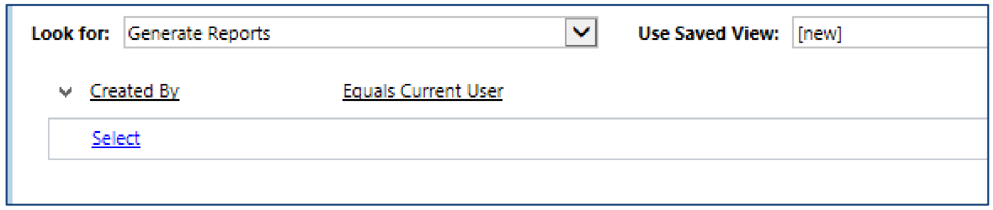
iii. When the results tab appears and the results are displayed, click Schedule Export

iv. A message is displayed, click OK

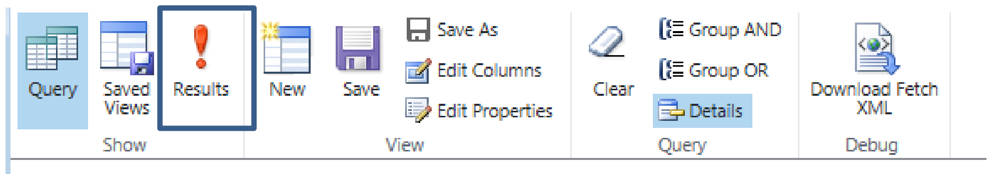


v. Open the Generated Reports

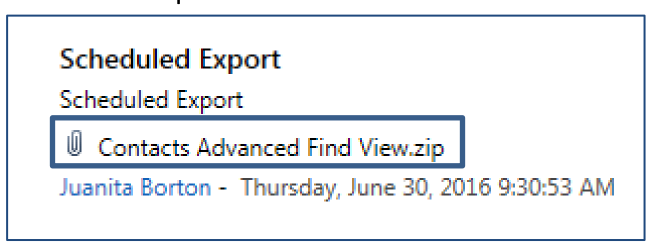
1. Open the Advanced Find window
2. Set the Look for (Generate Reports) and Filters (Created By Equals Current User)



3. Click Results



4. Select and open the generated report
    a. Note: Any Voter list will be shown as ExportContactsAdvancedFindView; find the desired report by looking at the date it was generated
    b. Click the "name" to select and open the generated report
5. Generate Report: Information page
    a. If you have scheduled poll books, you will recognize this page
    b. Status is shown under the General tab. When status is Complete, you may access the report
    c. Under the Generated Reports tab, click the report, which is shown as a zip file



6. When the window/folder containing the file is opened, double click the Excel file to open the report