# Table of Contents


Go “Live” on SVRS ..... 2

- Log in to SVRS ..... 2
- Password Policies ..... 2
- Change Your Password ..... 4
- Create Favorite and Shortcut to SVRS ..... 5
- Update Clerk Information ..... 6
- Certify New Workstations ..... 8
- Help Desk Contact Information ..... 9
- Other Resources ..... 9
- Contact the GAB Help Desk ..... 10
  - Be Ready to Provide Information ..... 10
  - How to Capture a Screenshot ..... 10
- Check Connectivity and Determine Server Number ..... 11
- Check Printer Settings ..... 12
  - DYMO LabelWriter ..... 12

Common Terminology ..... 14

Security ..... 18

Helpful Hints ..... 19

- Tips ‘n’ Tricks in SVRS ..... 19
- Basic Navigation in SVRS ..... 20
- Icons Used in SVRS ..... 26
- Icons Used in This Manual ..... 27

# Go "Live" on SVRS

## Log in to SVRS

When you log in to SVRS for the first time using your assigned user name and password, you will be prompted to change your password.

- Passwords must be at least 7 characters in length
- Passwords cannot include the individual's first or last name
- The password cannot match the User name
- Passwords must contain 3 of the following 4 complexity requirements:
  - uppercase characters
  - lowercase characters
  - numbers
  - symbols found on the keyboard (such as !, _, #)

**Note:** The **@** symbol and the period (**.**) are not permitted characters in a password.

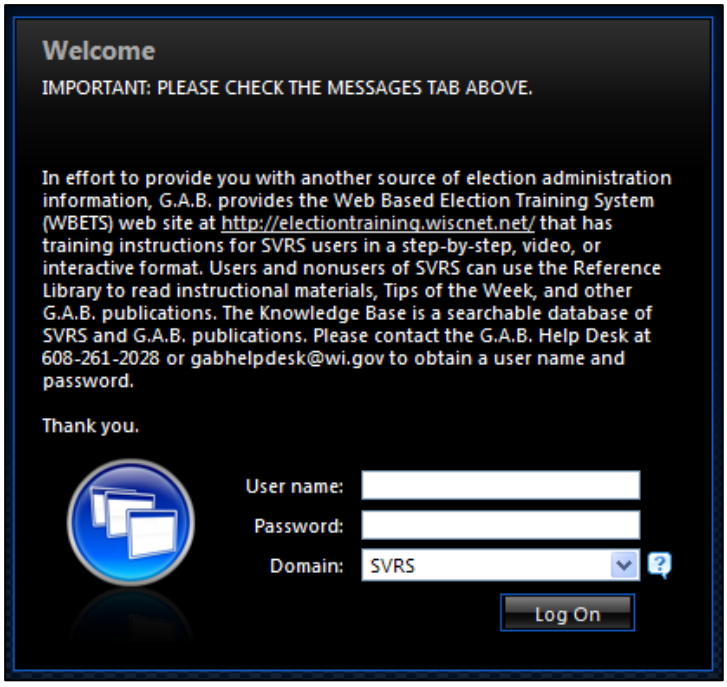
---

1. Open an internet browser and navigate to **http://svrs.wi.gov**. Your page should look like this:

*Alternatively, during SVRS desktop certification, SVRS may have been added as a favorite.*

*If this was done, you can select SVRS from Favorites.*
*If you want to create SVRS as a Favorite or a desktop icon, see Create Favorite and Shortcut to SVRS in this Getting Started chapter.*

2. Log in using your SVRS username and password.
3. The **Domain** is SVRS.
4. Click **Log On** or press **Enter** on the keyboard.

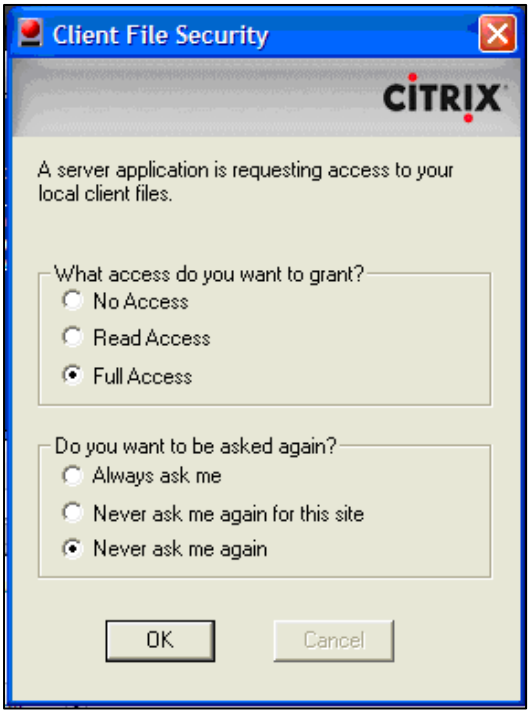



| Password Policies | |
|---|---|
| **Password Reuse:** | The last 8 passwords cannot be reused. |
| **Password Lockout:** | The logon account will be locked after the 4th consecutive failed logon attempt. |
| **Password Unlock:** | The account lockout period is 20 minutes. The account will automatically unlock after 20 minutes. (You will get another 4 tries to logon.) |
| **Password Change Frequency:** | Users will be required to change their passwords every 60 days. See Changing Your Password on page 4 of this section. |

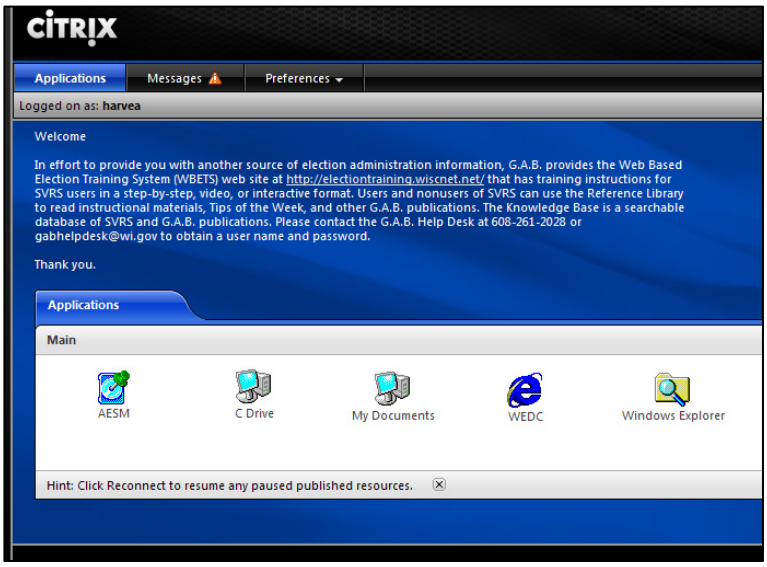
5. The first time you log in, you may be asked for access to local client files.

6. Select "**Full Access**" and "**Never ask me again,**" and click **OK**.

*By selecting "**Full Access**" you are only allowing full access to the Citrix files installed on your computer.*




7. Click on the **AESM** icon.

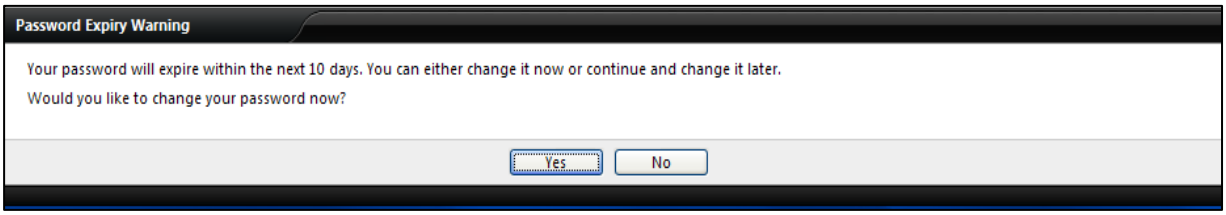



8. It will take a few moments for SVRS to open on your computer. A screen similar to this will pop up to let you know SVRS is starting.

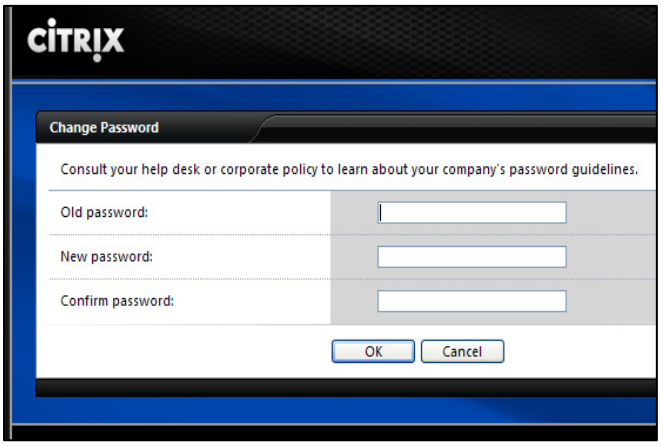
# Change Your Password

Every 90 days you will be required to change your SVRS password. The last eight passwords cannot be reused. After the fourth consecutive failed logon attempt your account will be locked. After 20 minutes, the account will automatically unlock and you will get another four tries to logon. See Log in to SVRS for more information on password requirements.

When you are within two weeks of the day on which you must change your password in SVRS, you will start receiving a reminder message each time you open SVRS with the AESM application icon. You may change your password by clicking **Yes**.

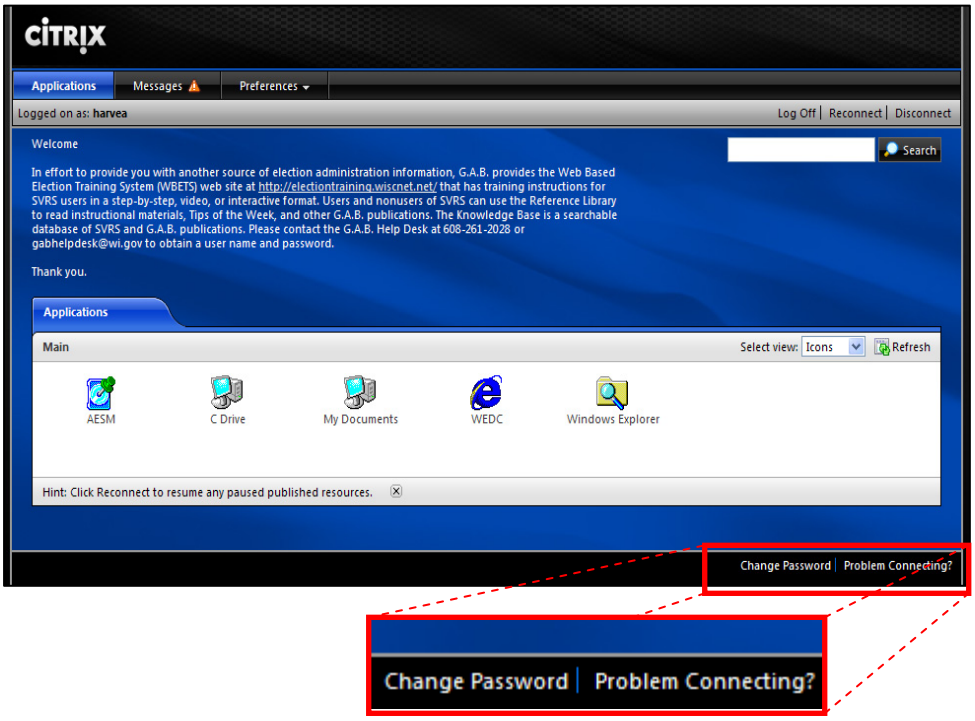



You will then proceed to the change password screen, which will prompt you to enter, first, your old password, and then your new password twice. After you click **OK**, you should receive a message that your password has been successfully changed.



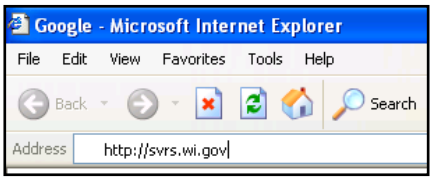

*If your password was not successfully changed, you should call the GAB Help Desk.*

You may also change your password at any time using the Change Password link in the lower right hand corner of the Citrix Login screen. This will bring you to the same **Change Password** screen you see above.

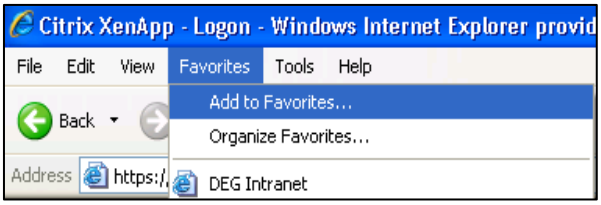


# Create Favorite and Shortcut to SVRS

If you have saved SVRS as a Favorite or created a desktop shortcut, each time you want to log in to SVRS, it will be just a click away.

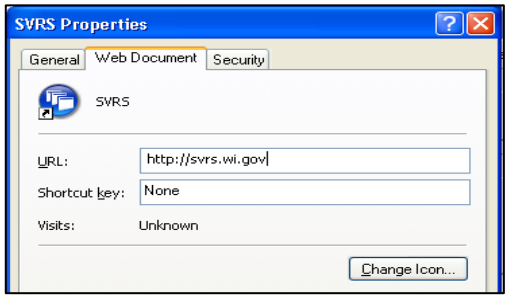



1. In the web browser URL type: http://svrs.wi.gov and hit **Enter**.

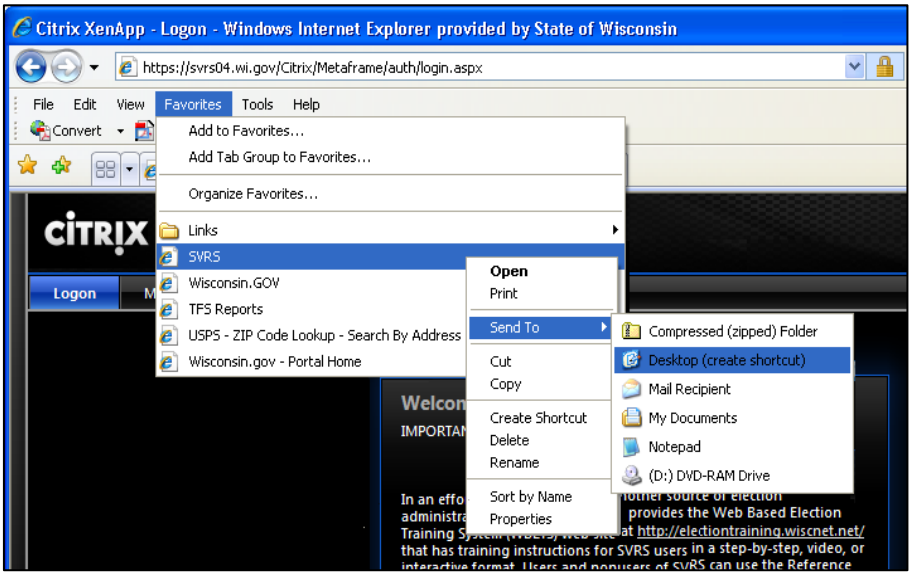



2. When the page completes loading, go to the menu bar and click on **Favorites**.
3. Select **Add to Favorites…**

4. In the **Name:** box replace with **SVRS** (or whatever name you prefer).
5. Click the **Add** button.




6. Go back to the menu bar and click on **Favorites**.
7. Right-click on **SVRS** (or whatever you named this shortcut).
8. Right click to view context menu and click **Properties**.
9. In the **Web Document** tab, type over what is in the URL box with **http://svrs.wi.gov**.
10. Click on the **Apply** button.

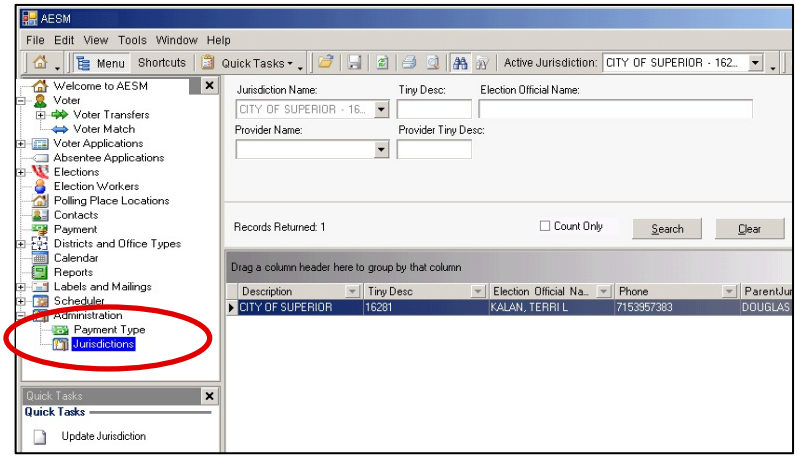



11. Click on the **OK** button.
12. Go back to the menu bar and click on **Favorites**.
13. Right-click on **SVRS**.
14. Select **Send To**.
15. Select **Desktop (create shortcut)** and the shortcut will appear on your desktop.

# Update Clerk Information

Contact information for clerks is kept in SVRS and should be kept up to date.

1. Expand **(+)** the **Administration** node.
2. Select **Jurisdictions**.
3. Enter the clerk's name in the **Election Official Name** field. You may also enter the municipality or county name in the **Jurisdiction Name** drop-down.
4. Type **Enter** or click the **Search** button.
5. Highlight and double click to open clerk's record to view details.

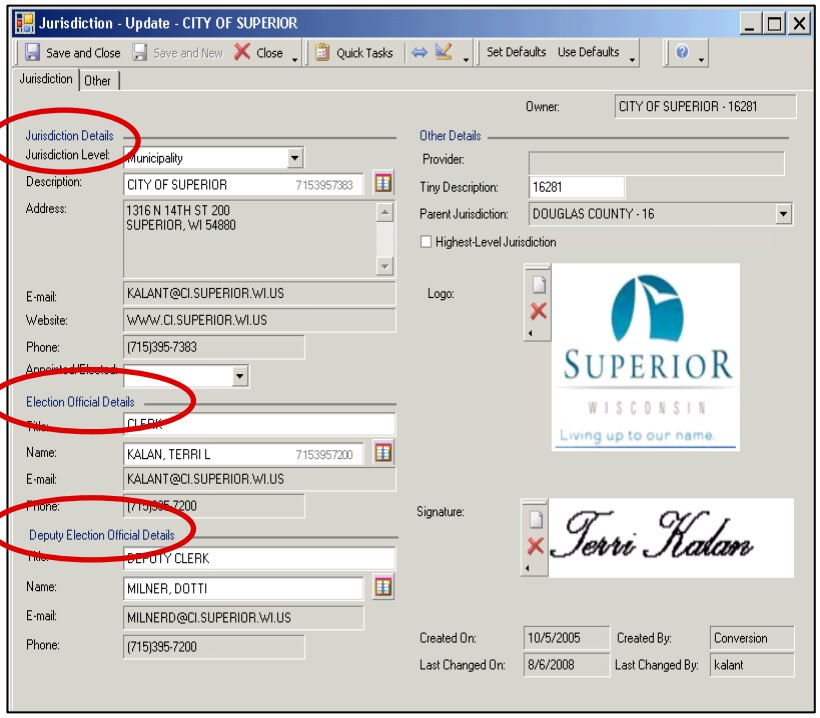



6. Select the appropriate choice from the **Appointed/Elected** drop-down list.
7. Review the other information. If any other information is incorrect, you must correct it in the **Contacts** node.

*Please note that you may need to update the clerk contact, the deputy clerk contact, or the municipality (jurisdiction) contact in the **Contacts** node.*

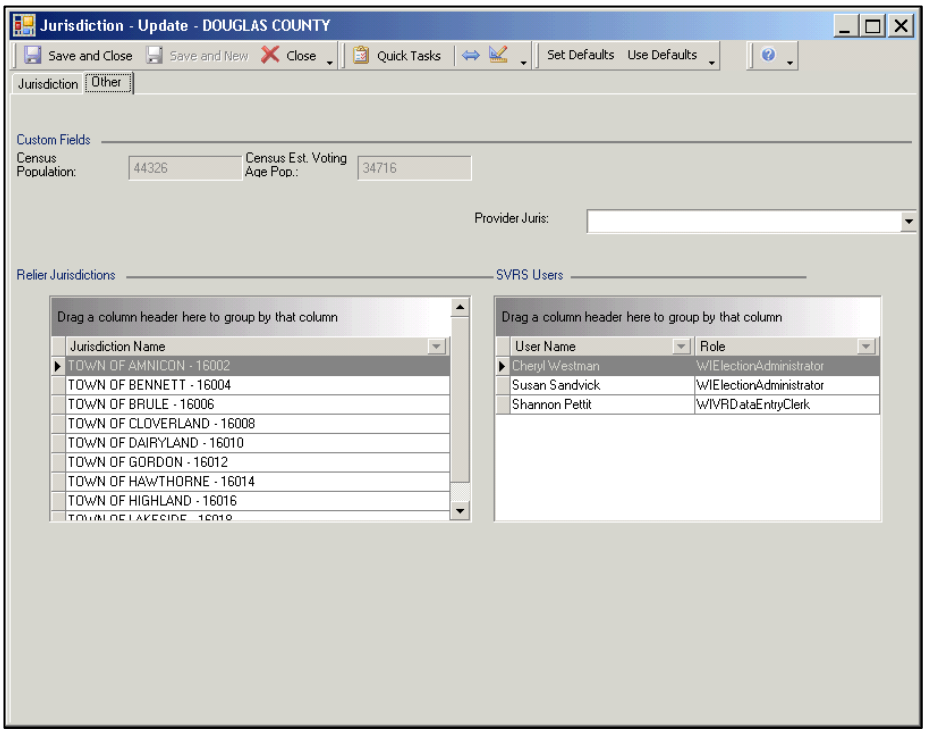
*To change the municipality, clerk, or deputy clerk contact, search for and open the contact record, then update the appropriate information. The **Jurisdiction** record will be automatically updated.*

*If you need to create a brand new clerk contact, you will do that in the **Contacts** node. Then you will return to the **Jurisdiction** record, click on the **Address Book Icon** next to the clerk's **Name** field, and select the new contact record you created. See the Contacts chapter for more information on adding and changing contact records.*




*For directions on how to add a **Logo** or **Signature** to the **Jurisdiction** record, so it appears on mailings produced out of SVRS, see the Uploading Logos, Letterhead, and Signatures into SVRS Mailings section of the Mailings chapter.*

8. Go to the **Other** Tab.




9. Verify that the name of each Relier appears in the **Relier Jurisdictions** grid.

   a. If you are a Self-Provider, you should see only your jurisdiction listed. If it is missing, select it in the **Provider Juris:** drop-down.

   b. If you provide SVRS services for other jurisdictions, all of your Reliers should be listed. If a Relier's name does not appear, you must go to the Relier's **Jurisdiction** record, and enter your County (or other jurisdiction) into the **Provider Juris:** field.

10. Verify that the information in the **SVRS Users** grid is correct. If any of the information is incorrect, contact the G.A.B. Help Desk.

# Certify New Workstations

If SVRS has never been used on the workstation (computer) in your office or if you have recently received a new computer or had to get a new hard drive, you may need to certify your workstation to be able to use SVRS. Please contact the GAB Help Desk and they will be able to walk you through the steps necessary to certify your workstation.
.

### Before You Call the GAB Help Desk

1. It is best to have someone who has administrative rights to your workstation make this call.
2. Please find out what version of Windows you are using and if there is a "Service Pack" installed.
3. Determine whether you have enabled the Windows Firewall or enabled a third party firewall.
4. Make sure you have installed or are using up-to-date anti-virus software.
5. Do a search on your hard drive (Local Disk C:) to see if the **SVRSCA certificate** exists and find the expiration date on that certificate. The search function is available through the Start Menu by finding "Search" and choosing "All files and folders", on Local Hard Drives (C:) for files and folders with "SVRSCA" in the name.
6. Do a search for three SVRS-specific fonts on your hard drive:
   a. "3 of 9.ttf" (True Type Font) or "3 of 9 Barcode"
   b. "UPSIDJ_.ttf" or "UpsideDownJJ"
   c. "UPSIDT_.ttf" or UpsideDownTOC"

**Call the GAB Help Desk.** See the Help Desk and Other Contact Information section.

### Workstation Certification Process

1. The Help Desk will walk you through each of the tasks mentioned above, including:
   a. Installing the certificate onto the local desktop.
   b. Loading the appropriate fonts to the local desktop.
2. Please see the following for additional technical specifications on using SVRS:

| Required? | Type | Recommended Specifications |
|---|---|---|
| Minimum Required | Printer | Required: laser printer, network connected, with software drivers for Windows 2003 or newer<br>Recommended:<br>For municipalities with less than 2,500 voters, HP LaserJet 1320TN or any printer that supports PCL5. For municipalities with more than 2,500 voters, HP LaserJet 4250DTN, HP LaserJet 4250DTNSL, or any printer that supports PCL5 |
| | Software | Windows XP Professional or later |
| | | Internet Explorer 6.0 or later |
| | | McAfee Anti-Virus 8.0 or similar virus protection software updated automatically over the Internet through scheduled task |
| | | Automatic Updates enabled to automatically download and install new patches |
| | Connectivity | 100 Mbps Ethernet interface with RJ-45 connector or adapter |
| | | High speed (broadband) connection (cable or DSL) |
| | | If network firewall exists, ports 80, and 443 must be open. |
| Optional | Other Peripherals | Dymo LabelWriter label printer |
| | | Laser barcode scanner with wedge or USB interface(WASP Scanner Preferred) |

## Help Desk Contact Information

# 608-261-2028
# GABHelpDesk@wi.gov

The SVRS Project Team is interested in maintaining close contact with election officials. Please contact the GAB Help Desk as the first step toward identifying and solving any issue you come across in SVRS. This will greatly improve our ability to provide you with assistance.

## Other Resources

# MyVote Wisconsin Website
# https://myvote.wi.gov

MyVote is a website designed for registered and non-registered voters in Wisconsin. This replaces the Voter Public Access (vpa.wi.gov) site. MyVote provides voters with registration, sample ballot, municipal clerk and polling place information. In addition, there is a section for military and permanent overseas voters to request an absentee ballot and access their absentee ballot online. The new online absentee ballot request and online absentee ballot access works with the Statewide Voter Registration System (SVRS) and notifies clerks who use SVRS of updates. Sample absentee ballots found on MyVote can be previewed and checked with the Ballot Preview in Electiondata CRM.

# Web Based Election Training System (WBETS)
**http://electiontraining.gab.wi.gov**

The WBETS website features an election calendar; latest news from the Government Accountability Board; a posting of election laws and GAB documents; a clerks' forum for election related questions; and a series of training courses covering SVRS and the Wisconsin Election Data Collection System (WEDCS). For further information about logging on and navigating WBETS

Government Accountability Board staff can be reached at:
212 East Washington Avenue, Third Floor
P.O. Box 7984
Madison, WI 53707-7984
Main Line: 608-266-8005
Fax: 608-267-0500
**http://gab.wi.gov**

## Contact the GAB Help Desk

Occasionally it may be necessary to call the GAB Help Desk at 608-261-2028.
Reasons to contact the Help Desk include:

- An error message received when using SVRS
- Data issues (e.g. voter records, district combos, elections, etc.)
- General issues (e.g. slow response time, functionality not working, etc.)
- Help with how to do something in SVRS
- Password resets

## Be Ready to Provide Information

You may be asked to provide the following information when speaking with the Help Desk:

- Name
- Municipality (please include if it is a village, town, city or county)
- County of the affected municipality
- Contact information (phone number and email address)
- SVRS User ID (do not give your password)
- Citrix Server, for example SEBWBAPP20A (see Check Connectivity and Server Number section)
- Other information (specific to issue)

## How to Capture a Screenshot

If you receive a specific error message in SVRS, you may need to capture a screenshot of the image so the Help Desk can see exactly what the problem is. You may wish to take this screenshot before calling the Help Desk.

- While the information is on your screen: (Do not click the **OK** button or press **Enter**)
- Press the **print screen** key on your keyboard (it may be labeled **Prnt Scrn** or other abbreviation)
- Open a new Microsoft Word or Excel document (or other word processing program)
- Select **Paste** from the edit menu (or hold down the CTRL key and hit the "V" key)
- Repeat **print screen** and **paste** for additional errors, if necessary
- Save the document and email it to the address given by the Help Desk

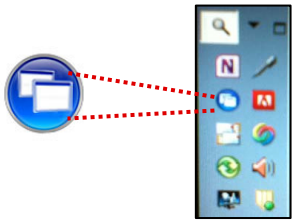
*The Help Desk representative may ask to "**shadow**" your session. They will ask only for your User name (login ID), but they should never ask for your password. Once they have your User name, you will see a dialog box asking if you will allow this shadow session. If you accept, they will be able to view your SVRS session only. You can end the session at any time using the **End Session** button on your shadow session box (upper left-hand corner). Be sure to end your session when you finish the call.*

# Check Connectivity and Determine Server Number

In the future, when calling the Help Desk, you may be asked to verify your connection to SVRS. Please become familiar with these steps.

## To Check Connectivity

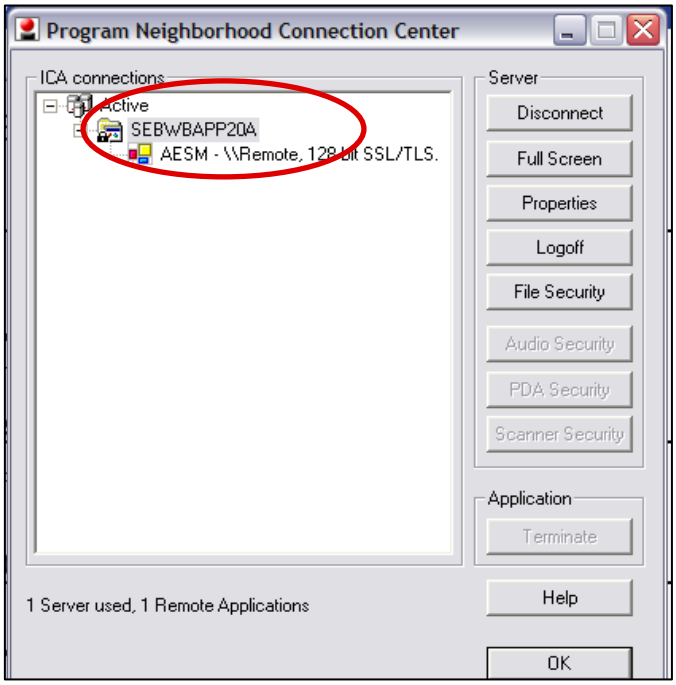
1. In the lower right hand corner taskbar, double-click on the icon that looks like two envelopes in a blue circle OR right-click on the same icon and **Open Connection Center**.



2. A new window will appear with information about your Citrix connections.

## To Determine Which Server Your Web Browser Is Connected

Look for the node that begins "**SEBWBAPP**". Immediately following this word is a number. This is the server number to which you are connected. In this example, we are connected to server 20.

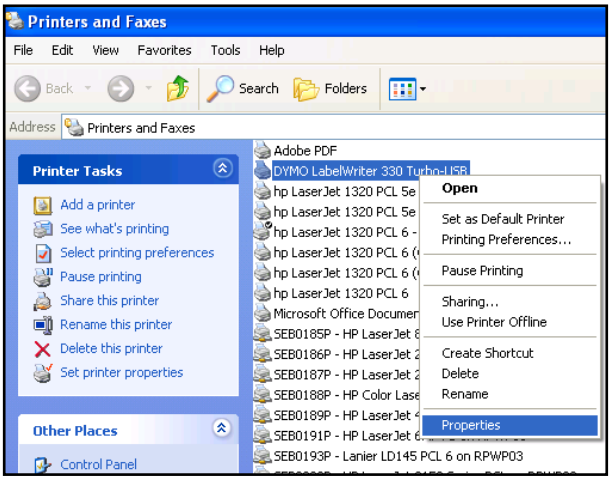


# Check Printer Settings

You may experience difficulty printing with SVRS and may need to adjust your Printer Settings, for example, when printing labels with a DYMO LabelWriter. Your first resource should be an in-house Information Technology (IT) or computer specialist, as many issues relate to specific settings on your own workstation or on the network in your office. Please contact the GAB Help Desk if you are still unable to print correctly. The following instructions cover a typical setup, but selections may vary in your office.

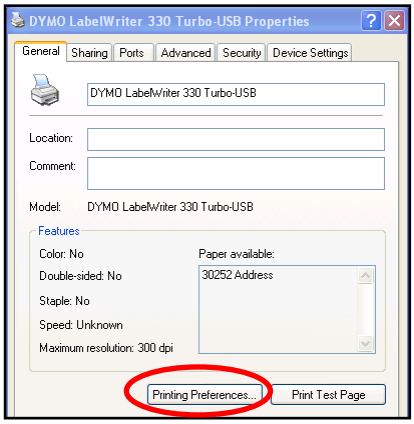
## DYMO LabelWriter

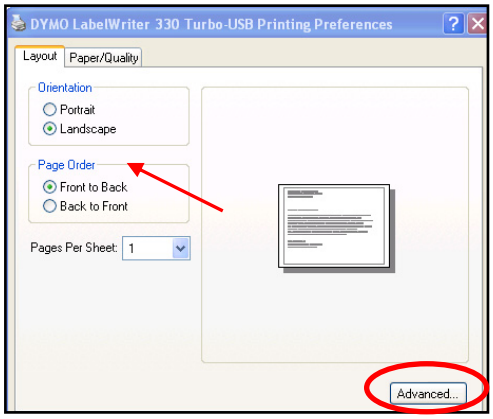
*These settings are made outside of SVRS and will therefore affect other applications for which you use the DYMO LabelWriter. Please contact the person responsible for managing Information Technology (IT) in your office before making any changes if you use your DYMO for applications other than SVRS.*




1. (While not logged in to SVRS) Start by **setting default printer settings**. There are several locations in which you can change the default settings for the DYMO LabelWriter. First, go to the **Start** menu (or **Control Panel**) and select **Printers and Faxes.** Right-click on your DYMO LabelWriter and choose **Properties**. Follow the instructions below. After you have finished with all the settings, try printing a test page from the General Tab.

*These pictures may not correspond exactly to the model you have, but the instructions should remain consistent regardless of model.*




a. **General Tab**

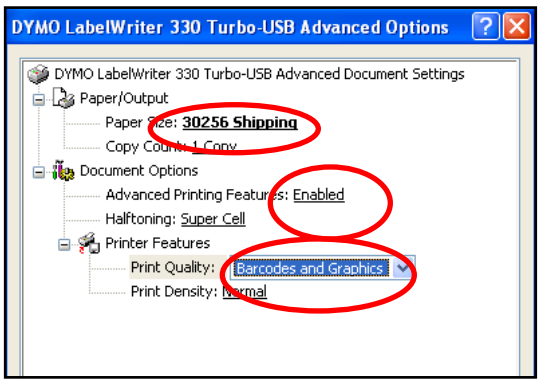
i. Choose **Printing Preferences**.

ii. Select **Landscape** radio button, then choose **Advanced.**

iii. Select **30256 Shipping** from the **Paper Size** drop-down. Then Select **Barcodes and Graphics** from the **Print Quality** drop-down.

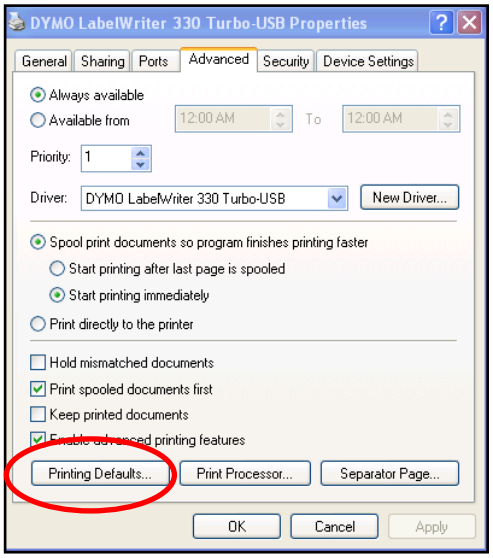
iv. Make sure that the **Advanced Printing Features** are **Enabled**.

v. Click **OK** on the Advanced Options and then **Apply** and **OK** on the Printing Preferences.



b. **Advanced Tab**

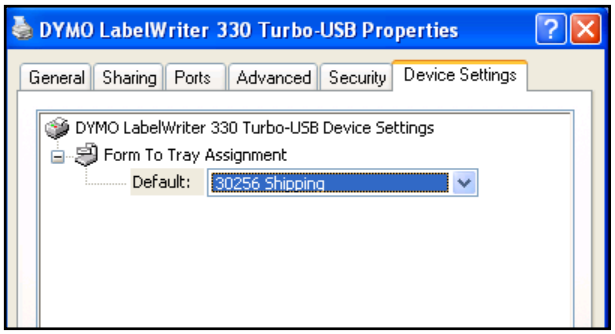
i. Select **Printing Defaults**. Follow the same process as was outlined in **Steps ii-iv** on the General Tab.




c. **Device Settings Tab**

i. Select **30256 Shipping** from the Default drop-down under **Form to Tray Assignment**. (Some DYMO Printers do not allow this setting to be changed).

ii. Click **Apply** and then click **OK**.




2. **Other Dymo Printers**

(The directions above are for the Dymo 330 and 330 Turbo. Other versions may vary.)

a. For the Dymo 450 and 450 Turbo, you will change the **Graphics** to **300X300**. You must leave the **Print Quality** on **Text Only**.
b. For the Dymo Twin Turbo, you must go to the **Paper/Quality** tab and select **Left Roll** or **Right Roll** in the **Paper Source** drop-down.
c. For the Dymo Duo, you will see two printers, one called **Tape** and one called **Label**. You will set your printer settings under **Dymo Duo Label**. Leave the **Print Quality** on **Text Only**.

3. **Reinstalling Printer Driver**. If you have adjusted all the above settings and your labels from SVRS are still printing incorrectly, you may need to reinstall your DYMO LabelWriter Printer Driver or you may need to install more than one printer driver. Please contact an IT professional or computer specialist familiar with your office and workstation. If you do not have access to assistance in your office, contact the GAB Help Desk for more information.

*If you are having trouble getting the barcode to print, see page 8 in this section, Before you Call the GAB Help Desk, **Step #6** to see if you have all the correct fonts installed.*

# Common Terminology

| Term | Definition |
|---|---|
| Active Jurisdiction | A term that describes counties and municipalities (cities, towns and villages). Your active jurisdiction is the municipality or county in which you are working in SVRS. |
| Application | A document which contains the necessary information for a voter to receive a voter record or an absentee ballot in SVRS. The GAB-131 is the voter application form and the GAB-121 is the absentee application form. |
| At-A-Glance Screen | A place where information from many parts of SVRS can be seen on one screen; the "home" page. |
| Ballot Style (in SVRS) | A unique combination of contests and candidates that appear on a particular ballot. A municipality may have one or more ballot styles in their municipality for each election. The ballot style name appears next to each voter's name on the poll book. SVRS automatically assigns default ballot-style names (e.g. NP-1 and NP-2), which can be renamed to describe your local ballots. Ballot names must be unique throughout the State. See Election Setup. |
| Barcode | A unique series of lines of varying width that represents a number which can be read by a scanner (laser) and digitally translated into a number. |
| Barcode Scanner | The instrument used to read a barcode as a number. |
| Best Fit | If you right-click on any column header, you will see a menu with the Best Fit option. Select Best Fit or Best Fit (all columns) to widen the columns to show all of the data contained in each column. |
| Candidate | Any person running for an office such as mayor, county supervisor, school board member, senator, etc. See Election Setup. |
| Contest | A race for elected office or a referendum question. See Election Setup. |
| Data Field | A space set aside for a particular piece of information. An example of a data field in SVRS is "Last Name," which is a space set aside to store a voter's last name. |
| Data Grid | A place where the information you've searched for appears, also called a results grid. |
| District | A geographic area containing electors who vote on the same particular contest(s). An assembly district and a ward are both examples of separate districts. |
| District Combo | A number that represents a unique combination of voting districts assigned to each voter. This number allows SVRS to determine the county, municipality, ward, school district and split in which a voter lives; therefore, the combination of districts is unique for any given voter.<br><br>The District Combos begins with the HINDI number. For example the Town of Blooming Grove is **13008-3269-1**. In this combination, **13** is for Dane County, **0** is for Town, **08** is for Blooming Grove, **001** is for Ward **1**, **3269** is the Blooming Grove School District and **1** is for a split in the ward. (If there are no divisions within a ward, the last digit will be 1.) |
| Drop-down Box | In SVRS, when you have multiple choices in one data field, you will see an arrow pointing down. By clicking on this arrow, your choices will be visible in a list. |
| Election Day Registration | An election day registration (EDR) is a voter application submitted at the polling place on the day of an election. Individuals who are submitting EDRs must have been residents of Wisconsin for at least 28 consecutive days prior to registration and be able to provide proof of residence. |

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| Election Inheritance | In SVRS, the State creates any statewide elections (Fall Primary and General Elections and Spring Primary and Spring Elections). Counties and municipalities use the same election that was created by the State. This is called Election Inheritance. This allows for "contest sharing" where contests created at the State or County level are viewable by the municipalities to which they correspond. See Election Setup. |
| Election Milestone | Milestones are benchmarks in SVRS related to the election cycle. There are nine milestones in every election in SVRS. You may need to check a milestone before proceeding to the next election management task. See Election Setup. |
| Election Owner | See "Owner Jurisdiction". |
| HINDI Number | The Highway Identification Number or HINDI consists of a five digit number that represents a unique municipality. The first two numbers are determined by the county, the last two numbers are specific to a municipality in that county and the number in between is based on whether that municipality is a city, town or village (2, 0 and 1 respectively). SVRS uses HINDI numbers as a part of a voter's district combo code. |
| Home Button | The house button located on the toolbar in SVRS brings up the System At-A-Glance Screen. |
| Issue Absentee Ballots | In SVRS, absentee applications can be added at various times in the election cycle. When you are ready to put those ballots in the mail for the voter, you will "issue" those ballots in SVRS, which creates mailing labels for the absentee certificate envelope and outer absentee envelope. |
| Jurisdiction (Active) | A term that describes counties and municipalities, including cities, towns and villages. Your active jurisdiction is the municipality or county in which you are working in SVRS. |
| Jurisdiction Box | Located near the top toolbar, the Jurisdiction Box is labeled "Active Jurisdiction" and is followed by a drop-down menu with the names of all municipalities and/or counties that you may access in SVRS. See "Jurisdiction (Active)". |
| Late Registration | A late registration is a voter application which is completed in the clerk's office after the close of registration, less than 20 days before an election. A late registration requires proof of residence, and late registrants are issued a Certificate of Registration (GAB-133). |
| Legacy System | Refers to electronic systems which were used for voter registration or for tracking absentee ballots prior to SVRS. |
| Local Disk (Hard Drive) | The location on which any workstation or computer stores information. The Local Disk is usually represented by "C:" but when using exporting reports and mailings from SVRS it is referred to as "V:" See Reports. |
| Mailing ID | The number that is assigned to any mailing label generated in SVRS. This is a unique number assigned to one particular mailing. It can appear as a barcode on the label, or a number, or both. It is used to record the mailing as returned. |
| Main Menu Tree | The branched list of nodes (tasks) that is your primary method of navigating in SVRS. |
| Menu Button | This button located on the toolbar will toggle the Main Menu tree on and off (to appear and disappear.) |
| Menu Pane | The area found to the left-hand side of the screen that contains the Main Menu tree. |
| Milestone | See "Election Milestone". |
| Mouse Double-click | You use the left mouse button and click twice to open an item in the results or data grid. Please do not use the double click when selecting items off the Main Menu tree. |

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| Mouse Right-Click | You use the right mouse button and click once to get Quick Task options or options for organizing the results grid. (e.g. Best Fit, Runtime Column Customization). |
| Mouse Single-Click | You use the left mouse button and click on an item once to expand a node, select an item on the main menu node, or select an item in the results grid. |
| Nested Grid | Occasionally in SVRS you will see items in the data grid which have a plus sign in front of them. This indicates that there may be more results visible if you click on the plus. A hidden grid will appear below the first line and will be indented slightly. This is a nested grid. |
| Nodes | Task-related items located on the Main Menu tree which allow you to navigate to a particular area or function within SVRS. They can be thought of as chapter headings. |
| Office Position | The particular office or job that is held by a candidate who is appointed or elected. |
| Office Type | The generic name of a particular office, which is used in SVRS as a template to setup specific contests. A county clerk is an office type. The Dane County clerk is an office position. |
| Owner Jurisdiction | The jurisdiction that created the election. See Election Setup. |
| Polling Place Assignment Plan | A specific way to designate which districts are assigned to each polling place location in SVRS. Also known as the PPAP, the polling place assignment plan can be used as a template and applied to any given election, whether inherited or created. Election workers and supplies can be assigned to particular districts or a municipality within a PPAP. PPAPs also determine the default poll book printing configuration (or which wards are together in one poll book). See Election Setup. |
| Polling Place Location | The physical location at which electors will vote on election day and the corresponding contact information for that location. Polling place locations are added as a district detail to each ward under the Districts node and are assigned when creating a Polling Place Assignment Plan. |
| Printing (Paper) Orientation | When you print from SVRS, you will have the choice to print in portrait or landscape format. This is called the paper orientation. A portrait selection will print with the narrow (8 ½”) portion of the paper at the top, whereas the landscape selection will print with the wide (11”) portion of the paper at the top. This document is in portrait orientation. |
| Provider | A municipality or county who is managing voter registration data for one or more other municipalities (called Reliers) in SVRS. |
| Quick Tasks | A term to describe an action that can be taken in SVRS. There are usually one or more quick tasks available in any given node in SVRS. Quick Tasks change depending on what area of SVRS you are in, and what actions you have taken up to that point. Quick Tasks can be found in the Quick Task pane at the bottom left of your screen in SVRS or as a button in the main toolbar that gives you a drop-down list of the same options. |
| Radio Button | Circles which fill in when clicked and designate you are selecting the choice to the right of that circle. On the screen, a Radio Button looks like a target when selected. |
| Recruit Icon | A button on your top toolbar that shows binoculars with a file folder. This button allows you to pull information from other parts of SVRS while in a particular data grid. It is used when assigning wards and election workers to your polling place assignment plan. |
| Refresh Button | This button, consisting of two green arrows bent in a circle, updates the data on your screen and is found in your main toolbar. |
| Registration | The act of applying for voter status. A voter is registered using a GAB-131 form or other form which contains similar information. |

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| Relier | A municipality that does not have access to SVRS and relies on another municipality or county (called a Provider) to manage their voter registration data, election setup and print their poll books for them. |
| Reporting Unit | A single ward or group of wards that collect and report election results entered into SVRS. See Election Setup. |
| Reporting Unit Plan | A reusable template that arranges your reporting units and can be applied to any election. See Election Setup. |
| Results Grid | A place where the data you search for appears. Also called a data grid. |
| Runtime Column Customization | Find this feature by right-clicking on a column heading in the data grid. Selecting Runtime Column Customization will cause a box with more data fields to appear. Data fields can be added to the grid by clicking and dragging them up to the column header row. To remove a column from the grid, click and drag the column header into the box. |
| Self-Provider | A municipality that has full access and manages only their own voter registration data and election process through SVRS. |
| Special Election | An election which is not statewide, but is being held only by your municipality or a set of municipalities. Most elections will be "inherited" from the State, but a special election will have to be created by the highest jurisdiction (county or municipality) for that election. |
| Sub-nodes | Nodes found within nodes, located on the Main Menu tree. When a plus sign is located next to a node, clicking on that plus will make a sub-node appear. |
| SVRS | An acronym for the Statewide Voter Registration System. Used to refer to the electronic system by which voter registrations and elections are managed. |
| Tabs | A way of arranging data to appear. Anytime you open a record or a search panel in SVRS (whether a voter or contact record or other), you will see the default page with information on that record. Often there will be other "pages" with information you can access by clicking on a different tab. |
| Task Pane | A panel that appears when you have chosen to do a task. When you select a Quick Task while in a voter application, a Task Pane will appear to your right with Quick Tasks available. Some task panes appear on the left side of your screen and replace the Main Menu tree. |
| Toolbar | One or two lines of buttons and menus that allow you to complete certain tasks. Your main toolbar is located toward the top of your screen in SVRS and includes "File" and "Edit" menus, buttons like the Recruit button, and the Active Jurisdiction drop-down list. |
| Ward | A geographically contiguous subdivision of a town, village or city. All territory in any municipality must be part of a ward. Ward boundaries are created based on population and are fully contained within one county A ward is the smallest reporting unit. It can be further divided by districts such as sanitary districts, lake management districts, school districts and technical college districts. |
| Watermark | A notice which, in SVRS, will be automatically generated on your poll book based on information contained in a voter record. For example, if a voter has been issued an absentee ballot, the watermark "Absentee" appears in the comments section of the poll book. |
| Wizard (Setup Wizard) | A set of screens which will assist you and instruct you as you complete certain tasks in SVRS. An example in SVRS is the Poll Book Setup Wizard, which assists you in generating your poll lists. |

# Security

## SVRS Security Standard Practices

In order to limit SVRS to authorized and trained users, it is important to follow the security best practices mentioned below:

- Do not loan access to the system to unauthorized persons by sharing your password
- Do not write down passwords on paper, sticky notes, etc
- Do not email passwords
- Do not share passwords
- Be sure to change passwords frequently. You will be prompted to change your SVRS password every 90 days
- Always lock your computer before leaving your desk. Do not leave a screen visible with confidential data displayed
- Secure GAB-131s and other sensitive documents in a locked cabinet or drawer

## SVRS User Rights, Roles and Responsibilities

- SVRS is designed to allow only authorized users with appropriate permissions may access portions of the application and the database
- Rights of the system users are defined to allow the users to access their data, based on jurisdiction and their job role or duties. The responsibility of the user is to create, manage and protect their information or data
- The State has the ability to configure the rights and roles as necessary to facilitate use of the system while helping to protect the system's integrity. Roles control the amount of access a user has in SVRS. For example, the lowest "VR" or "Voter Registration" role only allows users to enter voter applications and record voter history. The highest "EA" or "Election Administrator" role allows users full access to every function in SVRS, including creating poll books, changing districts, issuing absentee ballots, and running reports
- Everyone using SVRS will have their own user account and password.

# Helpful Hints

## Tips 'n' Tricks in SVRS

In the Main menu, select text Voter not the graphics .

Press the Tab key [Tab] on the keyboard after entering data into a field to move to the next field.

Single-click on the plus (+) sign to expand a menu node. This will allow you to see sub-nodes, or further options available under that node.

Single-click on the minus (-) sign to collapse a menu node. This will allow you to see more of the main menu.

Keep the CAPS LOCK key [Caps Lock] on when entering data.

If you are a provider, be sure to check your **Active Jurisdiction** Active Jurisdiction: STATE OF WISCONSIN .

Single-click when selecting Menu nodes, Toolbar Buttons, and Quick Tasks.

Double-click when opening records from the Data Grid.

Use the **Menu** button [Menu] on the top tool bar to return to the main menu.

When entering a middle initial as part of a name, do not enter a period (.) after the letter.

Use shortcut keys for copying, cutting and pasting information to/from SVRS. Use the [Ctrl] key:

- Hold down CTRL and "A" to select all information on a screen/grid
- Hold down CTRL and "C" to copy highlighted information
- Hold down CTRL and "X" to cut highlighted information
- Hold down CTRL and "V" to paste copied information

### Add your Own Helpful Hints…

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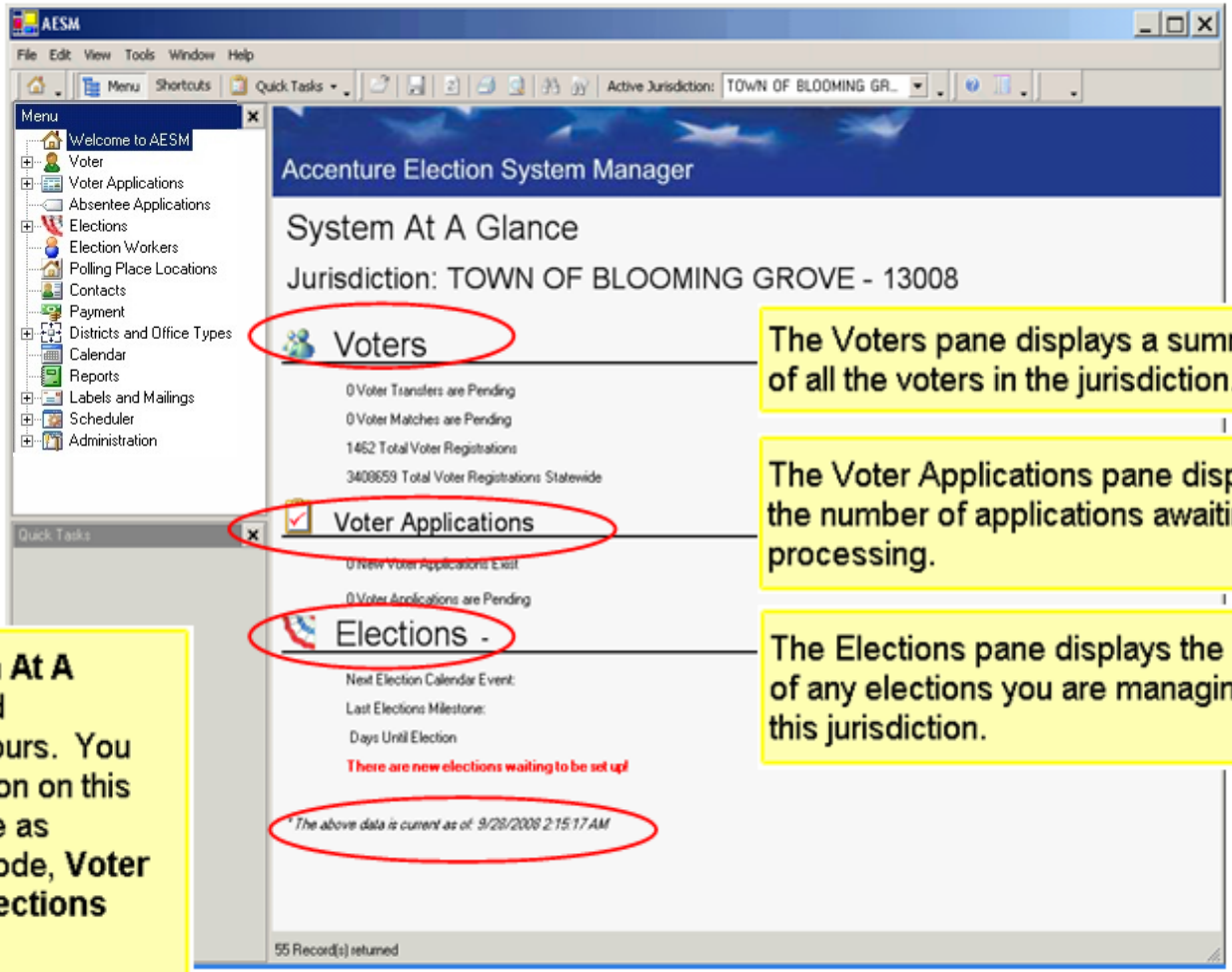
## Basic Navigation – The System At A Glance Screen

When you first log in to SVRS, you will find yourself in the **System At A Glance** screen.




The Voters pane displays a summary of all the voters in the jurisdiction.

The Voter Applications pane displays the number of applications awaiting processing.

The Elections pane displays the status of any elections you are managing in this jurisdiction.

Information in the **System At A Glance** screen is updated approximately every 24 hours. You may find that the information on this screen is not as up to date as information in the **Voter** node, **Voter Applications** node, or **Elections** node of SVRS.

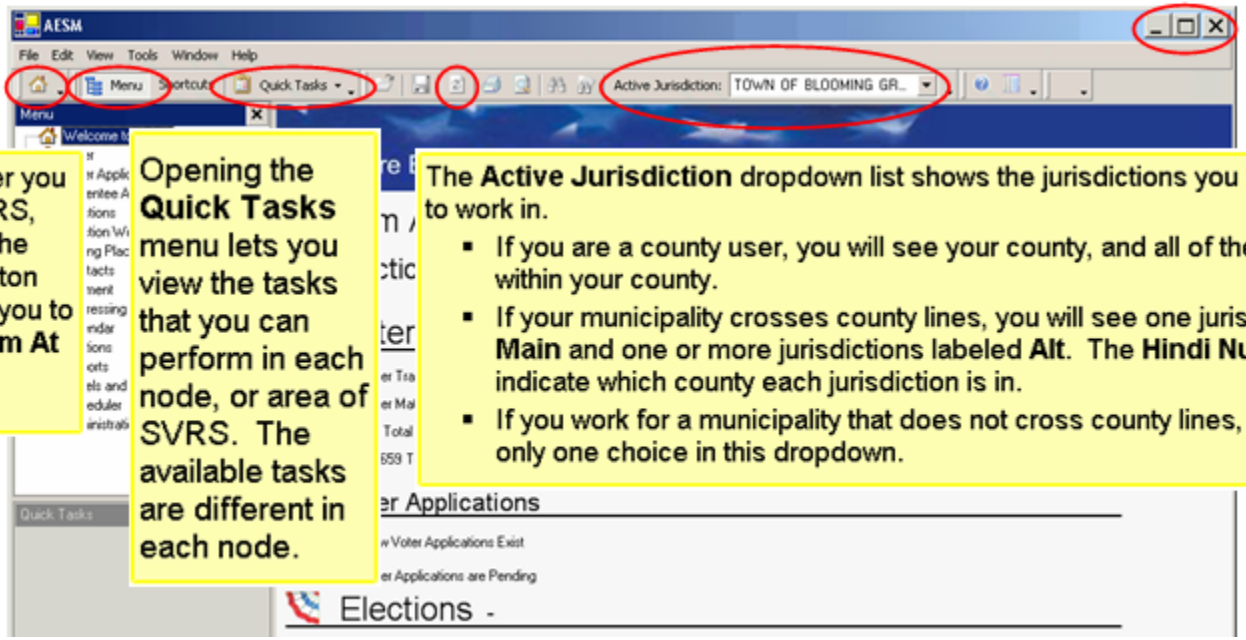
## Basic Navigation – Menu Bar

The **Menu** bar at the top of your screen has useful options and information.

Selecting some nodes may cause the **Main Menu** to be hidden. To display the **Main Menu** once again, click on the blue **Menu** button in the tool bar.

Click on the **Refresh** button to update your results when searching for records in SVRS.

In the upper right hand corner of your screen, note the **Minimize**, **Maximize**, and **Close** buttons. You can use these buttons to adjust the size of the SVRS screen, or close it.




Whereever you are in SVRS, pressing the **Home** button will return you to the **System At A Glance** screen.

Opening the **Quick Tasks** menu lets you view the tasks that you can perform in each node, or area of SVRS. The available tasks are different in each node.

The **Active Jurisdiction** dropdown list shows the jurisdictions you are authorized to work in.

- If you are a county user, you will see your county, and all of the municipalities within your county.
- If your municipality crosses county lines, you will see one jurisdiction labeled **Main** and one or more jurisdictions labeled **Alt**. The **Hindi Number** will indicate which county each jurisdiction is in.
- If you work for a municipality that does not cross county lines, there will be only one choice in this dropdown.

## Basic Navigation – Main Menu and Quick Tasks

To select a node, click on the word, not the picture.

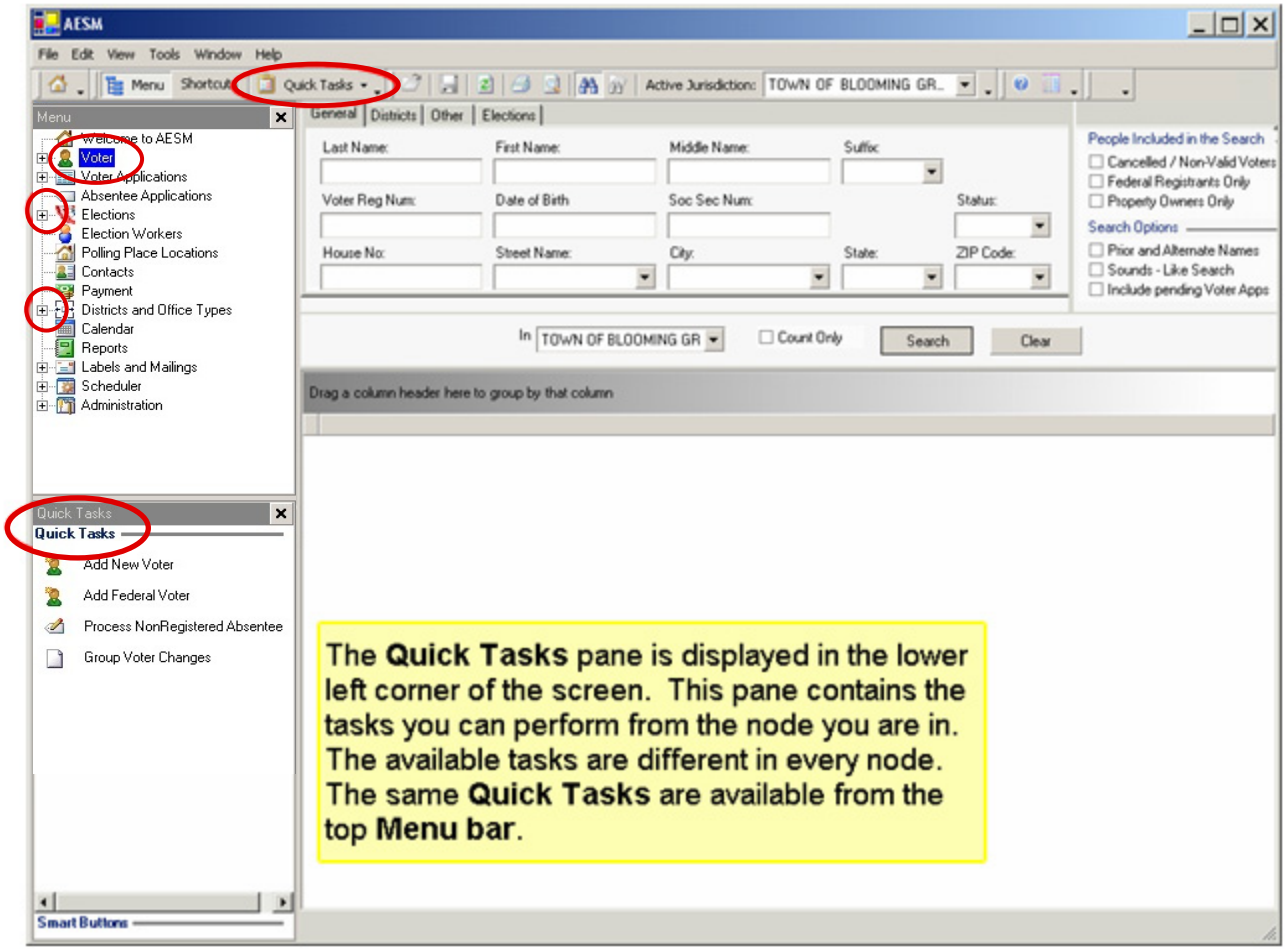
To expand a node, click on the **Plus sign (+)** in front of the node.

- This makes other areas of SVRS, called **sub-nodes**, visible. Sometimes you will see a **Plus sign (+)** beside a sub-node, which means that further sub-nodes are available.

To collapse a node, click on the **Minus sign (-)** in front of the node.

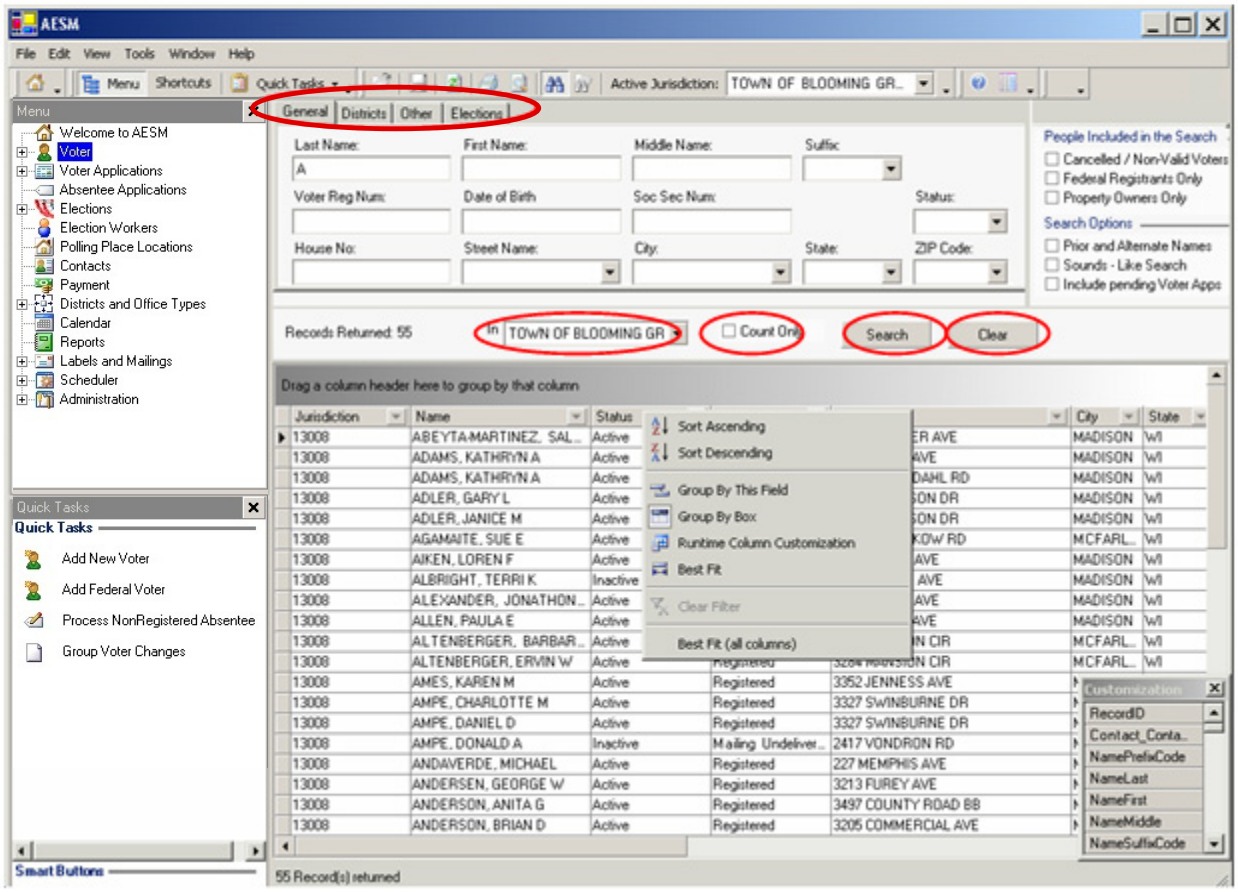
- If you have expanded too many nodes, it may be difficult to see the entire **Main Menu**. Clicking the **Minus sign (-)** wherever you see it will make more of the menu visible.

The **Main Menu** is on the left side of the screen. You will use this menu to navigate throughout SVRS. Each area listed in the **Main Menu** is called a **node**. In this example, the **Voter** node is shown.




The **Quick Tasks** pane is displayed in the lower left corner of the screen. This pane contains the tasks you can perform from the node you are in. The available tasks are different in every node. The same **Quick Tasks** are available from the top **Menu bar**.

This example shows the **Voter** node **Search Screen**. A **Search Screen** contains several fields you can use to enter your search criteria. These criteria are different in different nodes.




Some search screens have more than one **Tab**. You can click each **Tab** to see more search criteria.

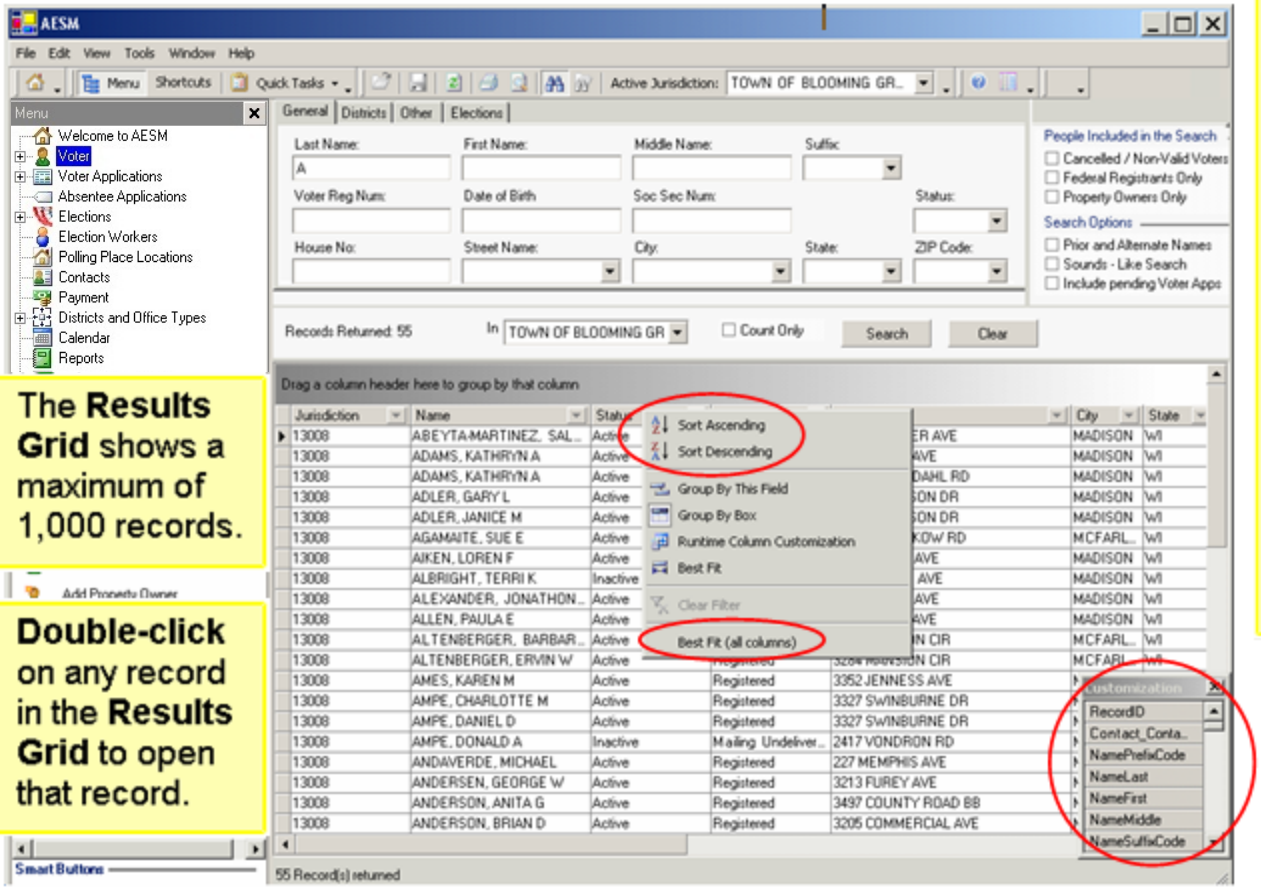
The **In** dropdown list defaults to your municipality. You can change this to search for voter records in the entire **State of Wisconsin**.

Check the **Count Only** checkbox to display the count of records matching your search criteria. The **Count Only** checkbox will give you an accurate count, even if there are more than 1,000 records.

Click the **Search** button (or press **Enter**) after you have entered your search criteria.

Use the **Clear** button to delete all of your search criteria, from every tab, before beginning a new search.

## Basic Navigation – The Results Grid




The **Results Grid** shows a maximum of 1,000 records.

**Double-click** on any record in the **Results Grid** to open that record.

If you right-click on one of the column headers, a menu will offer you the following options:

- **Sort (Ascending or Descending)** will sort all records by their value in that column. Choosing **Sort Ascending** in the **Name** column puts records in alphabetical order by name.
- **Best Fit** will widen the column so every entry is completely visible. **Best Fit (all columns)** does this for the entire grid.
- **Runtime Column Customization** will open a box that allows you to add or remove selected columns from the grid.

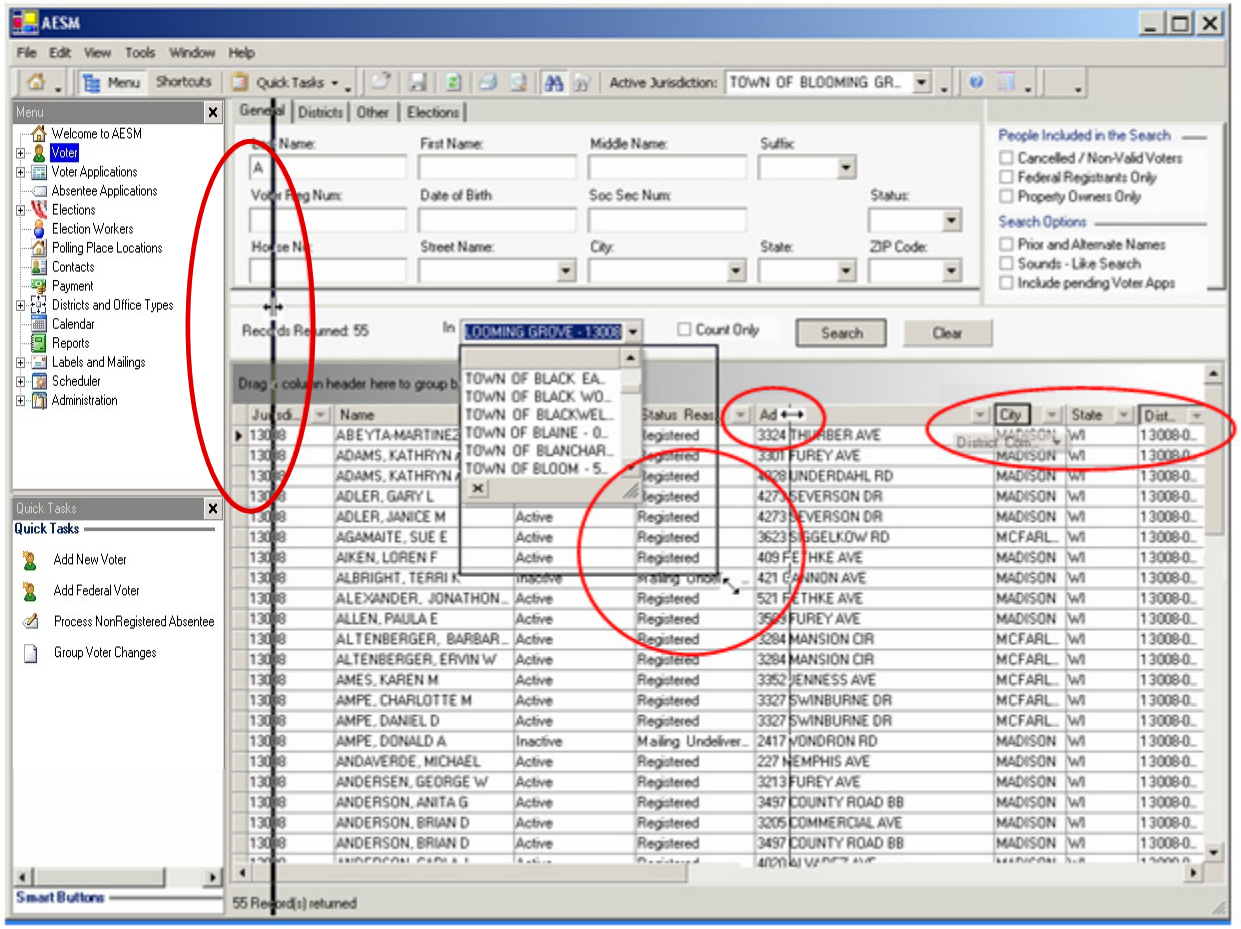
To add column headers to the grid, drag the appropriate column header from the **Runtime Column Customization** box and drop it where you wish. Remove column headers by dragging and dropping them into the **Runtime Column Customization** box.

Use the **Scroll Bars** on the bottom and right side of the screen to see more records or more columns of data.

## Basic Navigation – Resizing Menus, Columns, and Dropdown Lists

To expand the **Main Menu**, hold the mouse over the boundary between the menu panel and the search screen. When the cursor turns into a double arrow ↔, click the left mouse button and drag the black line to the width you would like.

To expand a dropdown list, hold the mouse over the triangular hashmark in the lower right corner. When the cursor turns into a diagonal arrow ⤡, click the left mouse button and drag the black frame to the size you would like.




To widen or narrow a column in the **Results Grid**, hold the mouse over the right edge of the column header. When the cursor turns into a horizontal arrow ↔, click the left mouse button and drag the black frame to the size you would like.

To move a column in the **Results Grid**, left-click on the column header, and drag it to the new location you wish to place it. The black frame will show you where the column will be moved when you drop it.

## Icons Used in SVRS

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| | • The red “exclamation point” icon indicates a required field that must be filled before continuing |
| | • The red “do not enter” icon means that your address data has not been validated by SVRS |
| | • The green “check mark” icon means that your address data has been validated by SVRS |
| | • The yellow “yield and exclamation mark” icon indicates that data is different from a previous record and may need to be checked |
| | • The yellow “pencil” and green icon indicates that a voter’s district combo was manually assigned. |
| | • The red and white address book allows you to search contact records from within another form by clicking on this icon |
| | • The dotted “ellipse” button allows you to search for further information within a form |

## Icons Used in This Manual

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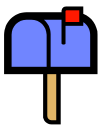
| | • SVRS-specific information to read before proceeding |
| | • Wisconsin-specific Business Process information to read before proceeding |
| | • Indicates that additional information about the topic is available elsewhere in the manual |
| | • Calls for special attention or is an additional tip for using SVRS |
| | • References Reports specific to or appropriate for a certain activity |
|  | • References specific Labels and Mailings |