Voter Search and Exporting Reports

Overview Of Topics Covered In This Training Guide

• Voter Search Introduction

• Voter Search Functions
  – Selecting Output Order for Search results
  – Save and re-run search's
  – Extracting Search Results

• Voter Search Reports

• Voter Search Query Options

• Exporting Reports
Voter Search

Introduction

Voter Search – Search Tools

- Scope
- Show Signature
- Search
- Voter Count
- Clear
- ^

- View Summary
- Full Image
- Select
- < >
- Close
Voter Search – Search Tools

• Scope
  
  • The scope field allows you to select which county you would like to search in, or if you want to search the whole state.

Voter Search – Search Tools

• Show Signatures
  
  • If checked, the Show Signature options will display the corresponding signature captured for each voter found in your search.
Voter Search – Search Tools

- **Search**
  - Initiates a search through the MT Vote database for voters matching your selected search criteria.
- **Voter Count**
  - Displays a current Voter count entry chosen under scope.
- **Clear**
  - Resets the all search criteria so you can start over.

Clicking the button will expand the search results window to encompass the whole screen.

Clicking the button again will return the window back to normal size.
Voter Search –
Search Tools

• View Summary
  • Highlighting a voter that matches your search criteria and hitting the View Summary button will bring up a Voter Summary window.
  • Voter Info, address, history, and alternative name information is all available.
  • Hitting the next button will automatically take you to the next voter in your list.

Voter Search –
Full Image

• Full Image
  • Full Image will display the complete document from which the voter's signature is appearing.
  • This option is only available if you checked the box for Show Signatures before running your search.
Voter Search Functions

The Output Fields allows you to select which information will display for the resulting voters that match your search criteria.

The Output Order allows you to specify in which order information is displayed.

Sorting Order determines if sorting should be Ascending or Descending.
Voter Search – Output Fields

Available Output Fields –

• Name
  • Last, First, Middle, DOB, Suffix
• Residence Address
  • Details, City, Zip, County, Precinct, Split, House#, Street Name
• Mailing Address
  • Details, City, State, zip, County
• Other
  • Status, State ID, Reg. Date, Last Vote Date, Last Update, Home Tel. No, Judicial District, City Ward, Old Voter ID

Voter Search – Output Order

Check the box and click the ▲ or ▼ button to move the selected output field up or down in the output order.

Any entries selected from the Output Fields will be included in the output order list.
Voter Search – Sorting Order

Select an item and click the ▲ or ▼ button to move the selected output field up or down in the Sorting Order field.

Clicking an entry in Sorting order and moving it up and down will determine the priority for it’s sort order.

Any entries selected from the Output Order will be included in the Sorting Order list.

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Voter Search – Save

• Once you have ran a search, the save screen allows you to save the selected search criteria so that the same search can easily be ran in the future.
Voter Search –
Save Current Search

• To save your current search enter in a unique name for the search and click the save button.

Voter Search –
Publish Saved Search’s

• A newly saved search will default to unpublished, which means it is only available for you to use.

• Selecting a saved search and clicking on the publish button will give the saved search a published scope, which will allow all users in your county to use the saved search.

• A published search can be unpublished or deleted at any time.
Voter Search – Running A Saved Search

• To run a saved search you will need to select it from the Select Saved/Published Search dropdown at the top of the voter search screen.

• Click Run Search

• Results will display.

• Note that the results may not always be the same if voters no longer match the search criteria, or if new voters do.

Voter Search – Extract

• MT Votes has the functionality to extract your search results and insert them into a spreadsheet.

• To begin you will need to click on the Extract Tab.
Voter Search –
Output Format

- Select the preferred output format. Text File is recommended.
- Select the Delimiter (how individual records are separated).
- CSV is recommended.
- Check the Box for Include Row Header to include row titles that will correspond to your selected output fields from the Output Tab.

Voter Search –
File Path

- Click the Browse Button to select the location to which you would like to save the file.
Voter Search –

Save As

• Note that the desktop option on the left does not correspond to your personal desktop.

• Click on the DOAISD6105 icon.

• Click on C:\ on ‘client’ (C:) to access your computer’s hard-drive.

• You may select any folder you like to save the file to.

• Enter a file name and click save.

Voter Search –

Extract File

• Your selected location to save the file will now show in the File path Field.

• Check the corresponding box if you would like to include a summary with your extracted search results.

• Click Extract

• A confirmation box will display. Click yes to continue.
Voter Search –
Extract File

- Extract was successful will display in green at the top right of the screen.

Voter Search –
Locate Extracted File

- To locate the extracted file, click your start button and then click on my computer.
Voter Search –
Locate Extracted File cont.

- Click on Local Disk (C:) to access your hard-drive
- Scroll down to locate the extracted file.
- Double click the file to open in Excel.
- If the file does not open in Excel contact the help desk for additional support.

Voter Search
Reports
Voter Search Reports

- A search has to be run before these reports will be accessible.

- Click on the Reports menu to gain access to the reports and labels available from Voter Search.

- When running reports a sort option window will open to allow you to choose how you want the report to be sorted.

Choosing the Mailing Labels report will generate a report containing a barcoded mailing label for each voter that was found during your voter search.

Choosing the Mailing Labels – No Barcode report will generate the same report but the labels will not have a barcode.
Voter Search

VIP Mailing Labels

- This Report generates household mailing labels by the last name of the voters at a single residence.

- For example, five voters live at one address: two have the last name of Smith, two have the last name of Robinson, and one has the last name of Kent. Then the system will print out three labels, one for each last name.

Voter Search

Household Mailing Labels

- A single Household mailing label is generated for each address.
Voter Search –
Print Report

• Clicking on print report will generate a voter query report.
• This report will include an entry for each voter returned in your search.
• Only, the fields chosen in the Output tab in voter search will be included in this report.

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Voter Search –
Reports

• Voter Count
  • Displays the total voter count for the state our county selected under scope.

• Voter Confirmation Card
  • Clicking on voter confirmation card will send a voter confirmation card to batch management.
Voter Search
Query Options

- Name
- Extract
- Residence Address
- Absentee
- Mailing Address
- Districts
- Precincts
- Status
- Output
- Activity
- Political Parties
- Comment
- Custom Fields
- Save
- Duplicate Reg.
Name –
Query Options

• Last Name
  • A – Z characters
• First Name
  • A – Z characters
• Middle Name
  • A – Z characters
• Gender
  • Male or Female
• Old Voter ID
  • Migrated Voter ID
• State ID
  • MT DL or State ID #
• SSN
  • Social Security Number

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Name –
Search Options

• Include Alternate Name
  • Alternate Names will be included
• Soundex
  • Similar sounding names will be included
• Show Confidential
  • Voters marked confidential will be included
• Voters Without Signatures
  • Voters with no scanned images containing a signature will be included.

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**Name** –

**Age**
- Birthday
  - Enter From and To range for voters DOB
- Age
  - Enter From and To range for age’s to be included
- Birth Month
  - Select the voters birth month to be included.
  - Optional: a specific day can be entered as well.

**Residence Address** –

**Address Types**
- All
  - Allows only City or Zip code search
- Standard
  - Enter Standard address details
- Non-Standard
  - Free-Form, enter anything
- Legal
  - Enter the properties legal description
**Absentee – Type**
- Civilian Overseas
- Election Specific
- Military Domestic
- Military Overseas
- Permanent All
- Permanent Federal
- Seasonal

**Absentee – Request Source**
- Absentee Team
- Conservation
- Democrats
- E-mail
- Fax
- In-Person
- Mail
- Nursing Home
- Other
- Republican
- University
Absentee –
Address

- Address
- City
- State
- Zip
- Country

Absentee –
Absentee Status

- Permanent All
- Permanent Federal
- UOCAVA

Absentee Status

- Voters without an active date range
  - Absentee entry exists in voter record with old date range.
Mailing Address –
Query Options

- Address
- City
- State
- Zip
- Country

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Districts –
District Type

- Ambulance
- Cemetery
- Citywide
- Community Council
- City Commissioner
- Countywide
- Drainage
- Fire
- Hospital
- House District
- Irrigation
- Judicial
- Jury

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**Districts — District Type Cont.**

- Jury
- Library
- Mosquito
- Park
- Public Service
- Resort
- Rural
- Rural Improvement
- Sanitary
- School District
- Single Member Trustee
- Senate District
- Sewer

**Districts — District Type Cont.**

- Soil Conservation
- Special Improvements
- Statewide
- Supreme Court Justice
- TV District
- Urban Transportation
- Ward
- Water & Sewer
- Water District
Districts – District Name

• Lists all entries under the district type selected in the above drop box.

Districts – Selected Districts

• Lists all districts that you checked in the district name box.

• Only the districts listed in this box will be included in your next search.
**Precinct – Precinct Name (Code)**

- Lists all precincts within your county.
- Checking the box next to a Precinct Name will include that selection in your next search.

**Status – Status/Status Reason**

- Active
  - NVRA 1st Notice Sent
  - NVRA 2nd Notice Sent
  - No reason
- Cancelled
  - Incomplete to Cancelled
  - Duplicate
  - Inactive to Cancelled
  - Moved Out of State
  - Deceased
  - Felony Conviction
  - Court Order
  - Request for Removal
  - Moved out of County
Status –
Status/ Status Reason Cont’d

- Inactive
  - NVRA
  - Undeliverable Mail
  - Ballot
  - Moved to Another
    County

- Pending
  - Late Registration –
    New
  - Late Registration –
    Precinct to Precinct
  - Late Registration –
    County to County
  - Late Registration

- Incomplete

- Provisional
  - ID Verification

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Status –
Flags

- MVD Verified Only
  - Voters whose identities
    have been verified
    against the MVD
    database.

- SSA Verified Only
  - Voters whose identities
    have been verified
    against the Social
    Security Administration
    database.

- Missing Voter Registration
  Card
  - Voters whose registration
    records do not have a scanned
    voter registration card.

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Status –
Flags Cont.

- Marked in Ballot Processing
  - Voters who have the Review Registration check box marked on the Verify Signature screen of the Ballot Processing module.

- CASS Comments Exist
  - Voters whose residence addresses have been flagged as rejected after being checked against the U.S. Postal Service’s Coding Accuracy Support System.

- HCF Resident
  - Voters who reside in a health care facility.

Political Parties –
Query Options

- Constitution
- Democrat
- Green
- Independent
- Libertarian
- Natural Law
- No Part
- Reform
- Republican
- Other Political Party
Activity –
Query Options

- Election Type
  - Election Date

- Voted In Election

- Registration Source

- Record Create Date

- Last Vote Date

- Vote Eligible Date

- Last Update

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Comment –
Query Options

- Voter Comment

- Audit Comment

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Custom Fields – Query Options

- The Custom Fields tab will list any custom fields your county has setup in flex labels.

Duplicate Reg. – Query Options

- Duplicate Count
- Comment
- Duplicate Receive Date
  - From
  - To
Duplicate Reg. –
Query Options

- Duplicate Count
- Comment
- Duplicate Receive Date
  - From
  - To

Exporting a Report

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Reports and Labels—Exports

- Within reports and labels there are several exports that must be saved to your local computer to access.

- These exports can not be ran by clicking the Run Report button.

Reports and Labels—Exports

- To begin you will need to select the export you would like to generate, and choose which filter options you would like.

- Click the Export button.
Reports and Labels—Exports

• If it is a large export you will receive the following warning.

• This does not always signify that the export will be excessively large, only that it has the potential to be so.

• Click Yes

Reports and Labels—Exports

• Once the export has finished successfully you will receive a confirmation at the top of the screen.

• Close out of Reports and Labels.
Retrieving Exported Reports

To begin you will need to access the Scheduled jobs Module from the main MT Votes screen.

The Schedule Job Manager screen will display.

Click on the Export tab.
Schedule Manager—Retrieving Exports

- Click on the export you created in the previous steps.

- Click the Move button.

- Click Yes on the confirmation screen that displays.

- Select where you want to save the file.

Save Export—Save As

- Note that the desktop option on the left does not correspond to your personal desktop.

- Click on either DOAISD6105 icon.

- Click on C$ on ‘client’ (C:) to access your computer’s hard-drive.

- Within you may select any folder you would like to save the file to.

- Enter a file name and click save.
Schedule Manager—
Retrieving Exports

- The save as window will close.
- The export will no longer be listed in the export tab of the Schedule Manager.
- Close out of the window.

Locating Exported Reports
Export—

Locate Exported File

• To locate the exported file, click your start button and then click on my computer.

Export—

Locate Exported File cont.

• Click on Local Disk (C:) to access your hard drive.
• Scroll down to locate the exported file.
• Double click the file to open in Excel.
• If the file does not open in excel contact the help desk for additional support.
As always, please feel free to contact the Help Desk, at 1-866-541-6767, with any further questions you have.