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Introduction

Reports can be generated at any time in SVRS. At the time a report is run, the information is retrieved directly from SVRS.

The two main ways to generate a report from SVRS are:

1. To use the search function and resulting data grid, available in most SVRS nodes;
2. To use the Reports node to generate an ad hoc report.

Key Terms

Filtering is a way of restricting the amount or type of data that is retrieved for a search or report in SVRS. Only the records that match the filter criteria will show up on the report or search. For example, for a report which returns only active voters, users can create a filter to select only the records for which the voter status is active.

Sorting is a way of ordering how records are listed on a report or returned from a search.

Grouping is a way to categorize or combine multiple search results in the data grid.

Data Grid is a place where information appears from a data search in SVRS.

Data Grid Reports are created from data search results in many of the SVRS nodes. Data search results can be filtered, sorted, grouped and formatted, then exported or printed.

Ad Hoc Report is the name of a standard report as defined in SVRS. Within each report category, there is a list of standard Reports available to print.

Report Category is an organizational grouping of ad hoc reports, as defined in SVRS. The Categories available are:

- **Absentee**
- **Applications (Voter Registration)**
- **Contacts**
- **Elections**
- **My Saved Reports (reports saved by a user).**
- **Poll Worker**
- **Polling Place**
- **Saved Reports (reports saved by a user, available for all users in their group)**
- **System Reports (used by Administration only)**
- **Voter**

Modify Layout is a feature within the **Print Reports** Quick Task. It is a way to adjust the arrangement of columns on an ad hoc report. The modified layout can be saved either in the **My Saved** or **Saved Reports Categories** for future use.

The Scheduler is a utility in SVRS that reports can be 'sent to' instead of directly to a printer or a file. It is a choice in the **Print Options** section, where the frequency and the time and date can be set up for running a report. In addition, when the SVRS system is busy, any report or mailing can be redirected to the Scheduler to run when resources are available. Reports processed through the Scheduler will always be written to the **My Documents** folder on the Server..

Data Grid Reports – Customizing, Formatting and Printing Reports from the Search Grid



Data Grid Reports can be created from any set of data that appears in a search results grid in SVRS. The only limiting factor is that the search results grid can hold a maximum of 1000 records. So any search that results in more than 1000 records, will not display all of the records. It may be possible to further filter your report, to limit the number of records to less than 1000. Then create a subsequent filter for the other records.

1. Select from the menu tree a node where you can complete a data records **search**. The resulting data grid records will be used for the report. The example below shows a search for voters with a **Status of Canceled** using the **Voter** node. To include Canceled voters along with Active or Inactive voters in a search, check **Canceled / Non-Valid Voters** under *People Included in the Search*. In this example, selecting the Status of Canceled is sufficient. [Editorial Note: there are two spellings “canceled” and “cancelled” which are used in SVRS. Both are acceptable.]

Status	Status Reason	Name	Date Of Birth	Address	City	State
Canceled	Deceased - Death Record Match	FOSS, THERESA M	1/1/1984	401 POWERS AVE	MADISON	WI
Canceled	Confirmed Registered Out of State	ITURBIDE, DEBRA A	1/1/1968	3162 WEBB AVE	MADISON	WI
Canceled	Confirmed Registered Out of State	VINJE, MEGAN J	1/1/1977	3522 EVAN ACRES RD	MADISON	WI

The recommended data fields for this particular report are Status, Status Reason, Name, Date of Birth, Address, City and Voter ID #.



Note: if the data grid report is to be distributed outside the office, customize the report to remove all confidential information – i.e., Date of Birth

2. Customize the view on the data grid to display only the data fields that are to be included on the data grid report. Right click on the row that has the data field names in the grid to display the menu. Select **Runtime Column Customization**

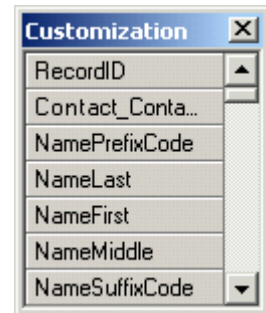
Status	Status Reason	Name	Date Of Birth	Address	City	District	Voter Reg
Canceled	Confirmed Registered Out of State	ITURBIDE, DEBRA A		3162 WEBB AVE	MADISON	13008-001-1	40650
Canceled	Confirmed Registered Out of State	VINJE, MEGAN J		3522 EVAN ACRES RD	MADISON	13008-003-2	41482

from the menu. This will display a list box containing all the data fields **NOT** displayed.



*Hint: Other helpful Customization data grid menu choices are **Best Fit** and **Best Fit (all columns)**. These will change the display to show the whole field or fields.*

- To add a field to the data grid, search the Runtime Column Customization box for the field name, then drag and drop it onto the data grid. It will be placed at the far right, but can be moved. To remove a field, drag and drop the field (name of the field on the title bar) to the Customization box.



Note: the Voter data grid and others like it contain fields such as Address or Name. Those fields are display fields, combining the several actual data fields into one. It may make sense to add a field to the data grid for sorting purposes only. For example, drag the StreetName field to the data grid so that the records can be sorted by Street Name, then Address, which will put them in house number order. The StreetName field can then be removed from the data grid for the final report.

The screenshot shows the AESM (Automated Election System Manager) interface. The main window displays a data grid for voters in the City of Ashland, Maine. The grid includes columns for Status, Status Reason, Address, City, State, District Combo, and Phone. A Customization dialog box is open, showing a list of fields that can be added to the data grid. The fields listed are RecordID, Contact_Conta..., NamePrefixCode, NameLast, NameFirst, NameMiddle, and NameSuffixCode. The dialog box also has a search bar and a list of search options.

NAME	Status	Status Reason	Address	City	State	District Combo	Phone
ANE	Cancelled	Deceased - Obituary	502 14TH AVE W	ASHLAND	WI	02201-001-1	
	Cancelled	Deceased - Obituary	523 BEASER AVE	ASHLAND	WI	02201-001-1	
A.	Cancelled	Deceased - Obituary	600 4TH ST W	ASHLAND	WI	02201-006-1	
	Cancelled	Confirmed Registered Out of State	704 MACARTHUR AVE			2201-005-1	
	Cancelled	Confirmed Registered Out of State	2119 4TH ST E			2201-010-1	
M.	Cancelled	Confirmed Registered Out of State	514 BEASER AVE			2201-002-1	
M.	Cancelled	Confirmed Registered Out of State	513 CHAPPLE AVE			2201-002-1	
HERINE J.	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE			2201-007-1	
	Cancelled	Deceased - Obituary	300 12TH AVE E			2201-011-1	
	Cancelled	Deceased - Obituary	911 3RD ST W			2201-002-1	
	Cancelled	Confirmed Registered Out of State	704 MACARTHUR AVE			2201-005-1	
	Cancelled	Confirmed Registered Out of State	506 15TH AVE W			2201-001-1	
MARIA	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE	ASHLAND	WI	02201-007-1	
	Cancelled	Deceased - Obituary	1206 LAKE SHORE DR W	ASHLAND	WI	02201-002-1	
M.	Cancelled	Deceased - Obituary	1319 BEASER AVE	ASHLAND	WI	02201-003-1	
	Cancelled	Confirmed Registered Out of State	506 15TH AVE W	ASHLAND	WI	02201-001-1	
	Cancelled	Deceased - Obituary	1800 7TH ST W	ASHLAND	WI	02201-003-1	
IMAS	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE	ASHLAND	WI	02201-007-1	
ENE	Cancelled	Confirmed Registered Out of State	700 SAINT CLAIRE ST	ASHLAND	WI	02201-009-1	
	Cancelled	Confirmed Registered Out of State	818 PRENTICE AVE	ASHLAND	WI	02201-008-1	

4. Not all data fields are available in a search function criteria. For example, the list above includes all Canceled voters, including Deceased. However, to display only **Confirmed Registered Out of State** voters (i.e., one of the *Status Reasons for Canceling a Voter*):

- Click on the arrow **button** (not the arrow used for sorting the column) in the Status Reason title bar. A drop down box should appear with the various Status Reason values for Cancellations listed. The list contains all the values that are actually in the data grid.
- For this example, **Confirmed Registered Out of State** was selected. All other records with different Reason codes will drop into a list at the bottom of the screen, leaving the records you want to include on the report in the data grid.

Records Returned: 3 In TOWN OF BLOOMING GR... ☐ Count Only

Status	Status Reason	Name	Date Of Birth	Address	City	State
Cancelled	(All)	FOSS, THERESA M	1/1/1984	401 POWERS AVE	MADISON	WI
Cancelled	(Custom)	ITURBIDE, DEBRA A	1/1/1968	3162 WEBB AVE	MADISON	WI
Cancelled	(Blanks)	VINJE, MEGAN J	1/1/1977	3522 EVAN ACRES RD	MADISON	WI

By selecting a specific Reason...

Records Returned: 3 In TOWN OF BLOOMING GR... ☐ Count Only

Status Reason	Name	Date Of Birth	Address	City	State	District...
Confirmed Registered Out of State	ITURBIDE, DEBRA A	1/1/1968	3162 WEBB AVE	MADISON	WI	13008-001-1
Confirmed Registered Out of State	VINJE, MEGAN J	1/1/1977	3522 EVAN ACRES RD	MADISON	WI	13008-003-2

The other records move to the bottom of the pane.

3 Record(s) returned

5. To format the report and print the data grid information:

- Select **Preview** from the File menu.
- Select **Page Setup** from the Preview File menu.

Preview

File View Background

Page Setup...
Print...
Print
Export To
Send As
Exit

Name	Status	Status Reason	Address
HOYER, KATHERINE L.	Cancelled	Confirmed Registered Out of State	1639 KIMBALL ST
SWANSON, VICKI L.	Cancelled	Confirmed Registered Out of State	704 MACARTHUR AVE
MITCHELL, JUNE M.	Cancelled	Confirmed Registered Out of State	2119 4TH ST E
EVANS, ANGELIQUE M.	Cancelled	Confirmed Registered Out of State	514 BEASER AVE
ACKLEY, MARGARET M.	Cancelled	Confirmed Registered Out of State	513 CHAPPLE AVE
BOSMAN-CLARK, KATHERINE J.	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE
SWANSON, AARON L.	Cancelled	Confirmed Registered Out of State	704 MACARTHUR AVE
LONG, WILLIAM M	Cancelled	Confirmed Registered Out of State	506 15TH AVE W
MCGOVERN, FIONA MARIA	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE
LONG, BARBARA J	Cancelled	Confirmed Registered Out of State	506 15TH AVE W
HOMA, PATRICK THOMAS	Cancelled	Confirmed Registered Out of State	1411 ELLIS AVE
BABCOCK, ALICIA JOLENE	Cancelled	Confirmed Registered Out of State	700 SAINT CLAIRE ST
SUSANJ, THERESA E	Cancelled	Confirmed Registered Out of State	818 PRENTICE AVE

AESM

File Edit View Tools Window Help

Quick Tasks

General Districts Other Elections

Last Name: First Name:

Voter Reg Num: Date of Birth:

House No: Street Name:

Records Returned: 55 In CITY OF ASHLAND

Drag a column header here to group by that column

	Status	Status Reason
ANE	Cancelled	Deceased - Obituary
	Cancelled	Deceased - Obituary
A.	Cancelled	Deceased - Obituary

- Adjust the Paper **Size**, **Source** and **Margins** if necessary. Select **Portrait** or **Landscape**.
- Click the **Printer** button to select a printer or set other options particular to your printer. Click OK to return to the Preview screen.

Page Setup

Print Preview

Paper

Size: Letter

Source: Automatically Select

Orientation

☐ Portrait

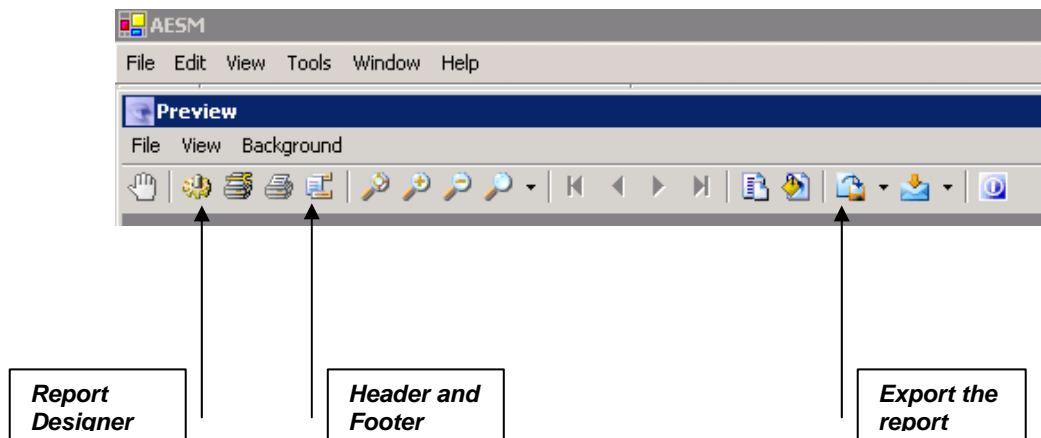
☒ Landscape

Margins (inches)


Left: 0.5 Right: .5

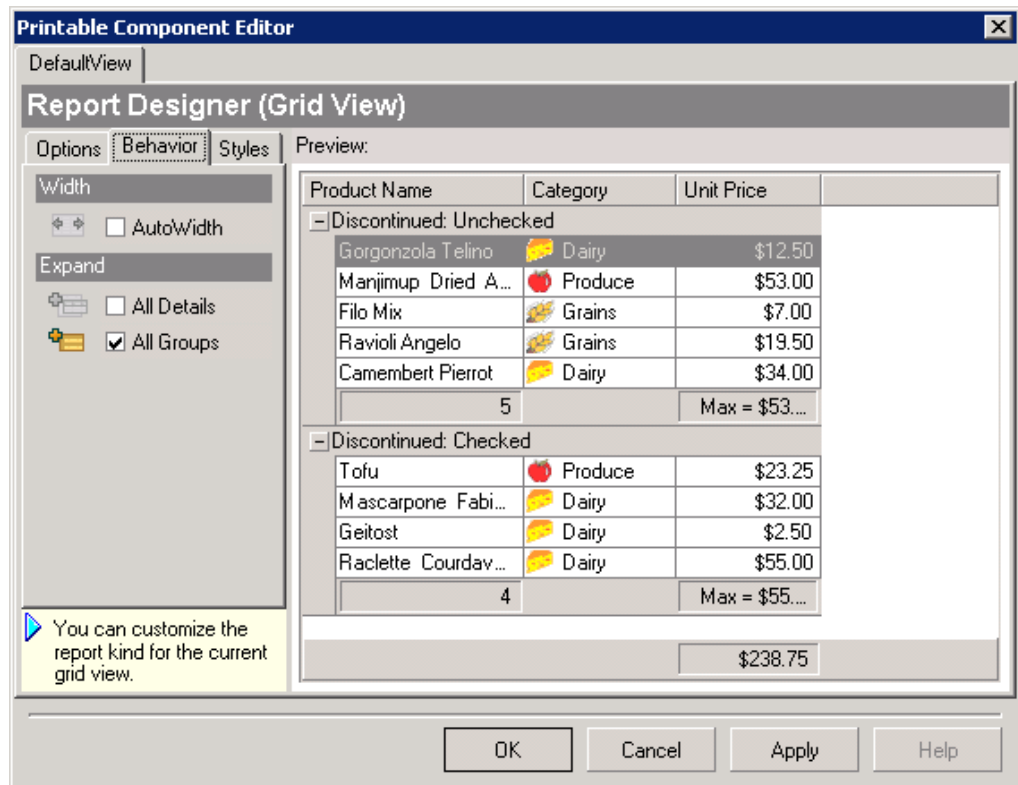
Top: 1 Bottom: 1

OK Cancel Printer...



- e. Click on the gear icon to open the **Printable Component Editor** or “**Report Designer (Grid View)**”. On the Behavior tab, Uncheck **AutoWidth**. Click **OK**.

 *Note: there are other options you can change using the Report Designer. Have fun experimenting!*



- f. On the Preview pane, click on the **Header-Footer** icon (See above)

- g. Enter header and footer information such as the Title, Date Printed and User Id. The strange boxes under "Header" and "Footer" are choices for vertical alignment- should the text be at the top, middle or bottom of the header or footer. Click **OK** to save.

Header

Font... Arial, 12pt, style=Bold

Voter Registrations Cancelled Due to Notice from Another State

Footer

Font... Microsoft Sans Serif, 8.25pt

OK Cancel

- h. From the Preview menu, select Print... (allows choice of Printer) or Print (default printer) or Export To (allows saving as a PDF).
- i. Alternatively, use the Export button at the top of the Preview form for more export choices – the same options are available as in the Reports node. See [Printing Options](#) and [Export to a File](#) in this section.

Preview

File View Background

Page Setup... Print... Print Export To Send As Exit

Status Reason	Name	Date Of Birth	Address
Status: Cancelled			
Confirmed Registered Out of State	ITURBIDE, DEBRA A	1/1/1968	3162 WEBB AVE
Confirmed Registered Out of State	VINJE, MEGAN J	1/1/1977	3522 EVAN ACRES R

Save As

Save in: Town of Bergen

File name: Document

Save as type: PDF Document (*.pdf)

Save Cancel

6. To copy search results from the data grid into a Microsoft Excel spreadsheet (*i.e., instead of printing search results directly from SVRS as shown above*):
 - a. Select **Ctrl A** to highlight the data information from the data grid,
 - b. Select **Ctrl C** to copy the information from the data grid,
 - c. Open a spreadsheet in Microsoft Excel;
 - d. Then select **Ctrl V** to paste the data information into the excel spreadsheet.

The screenshot shows the AESM application window. The 'General' tab is selected, and the 'Active Jurisdiction' is set to 'TOWN OF BLOOM - 53004'. The search results show 5 records. The data grid contains the following information:

Jurisdiction	Voter Reg Num	Name	Party	Status	Status Reason	City	State	District Combo	Phone	Date Registered
53004	0016681009	ANDERSON, HELEN ANN	Not Applicable	Active	Registered	HILLSBORO	WI	53004-001-2	6086254509	11/2/2004
53004	0016681010	ANDERSON, JOHN IVAN	Not Applicable	Active	Registered	LA FARGE	WI	53004-001-2	6086252022	11/2/2004
53004	0016681011	ANDERSON, JUDY MARIE	Not Applicable	Active	Registered	LA FARGE	WI	53004-001-2	6086252022	11/2/2004
53004	0016681013	ANDERSON, MICHAEL D	Not Applicable	Active	Registered	LAFARGE	WI	53004-001-2		9/24/2004
53004	0016681012	ANDERSON, MARVIN EUGENE	Not Applicable	Active	Registered	HILLSBORO	WI	53004-001-2	6086254509	11/2/2004



Note: whenever you paste information from the data grid into a Microsoft excel spreadsheet, the data columns, column positions, and sorts will neither save nor appear in the spreadsheet as they do in the data grid in SVRS. You will have to create new columns, column arrangements, and sorts in excel.

Ad Hoc Reports



Ad Hoc Reports are a set of standard reports available at any time in SVRS. Ad hoc reports can be filtered, sorted, and then printed or exported to a file. The report layout can also be modified and saved for future use.



Special reports have been created for Wisconsin to comply with G.A.B. reporting needs or to help Clerks more easily use SVRS. These reports all have the prefix of "WI" to help identify them. Please refer to The Reports Reference Guide at the beginning of this section for a list of commonly used Ad Hoc Reports.

Understanding Filters and Sorts used to generate Ad Hoc Reports

1. A **Filter** is the logic criteria used to restrict either the type or amount of data that is retrieved for an ad hoc report in SVRS. Only the data records that match the filter logic criteria will appear on the ad hoc report when it's generated.
2. A **Sort** is the logic criteria used to arrange the data on an ad hoc report in a particular order.
3. To build a filter in SVRS you need four components:
 - a. The **And/Or** logic criteria
 - b. The filter **Field Name**
 - c. The filter **Condition**
 - d. The filter **Value**
 - When building a filter always start the filter with the **And** logic criteria. Also, use the **And** logic criteria to pull data by multiple field names. Note, when you use the **And** logic criteria, every single criteria within the filter must be met to generate the ad hoc report. When you use the **Or** logic criteria only one of the filter criteria must be met.

For example the filter below will pull only active voters on the ad hoc report with a 1/1/1976 date of birth.

AND/OR	FIELD NAME	CONDITION	VALUE
And	Voter Status	Equals	Active
And	DOB	Equals	1/1/1976

While the following filter will pull all voters (*i.e., inactive and active*) on the ad hoc report with either a 1/1/1976 or 1/1/1988 date of birth.

AND/OR	FIELD NAME	CONDITION	VALUE
And	DOB	Equals	1/1/1976
Or	DOB	Equals	1/1/1988



*Note: When combining multiple filters as seen in the examples above, you can also use the **And**(and **Or**(, which will group the filter logic criteria inside the parentheses. SVRS will process the filter logic inside the parentheses first and then process the filter logic outside the parentheses. This means all logic criteria inside the parentheses must be met first, before SVRS processes the criteria outside the parentheses.*

- To build a sort in SVRS choose the field name you want the data arranged by and then chose the order you want the data to sort. For example, the sort below will arrange the data by last name in ascending order.

FIELD NAME	ORDER
LastName	ASC

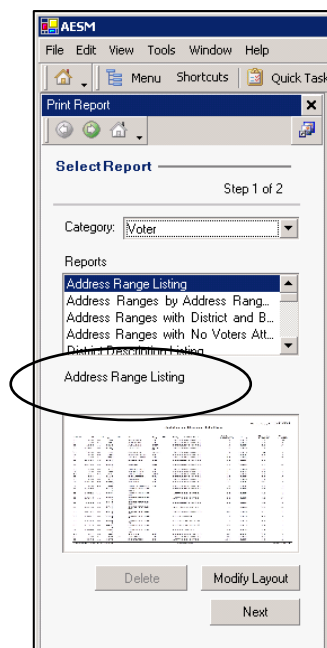
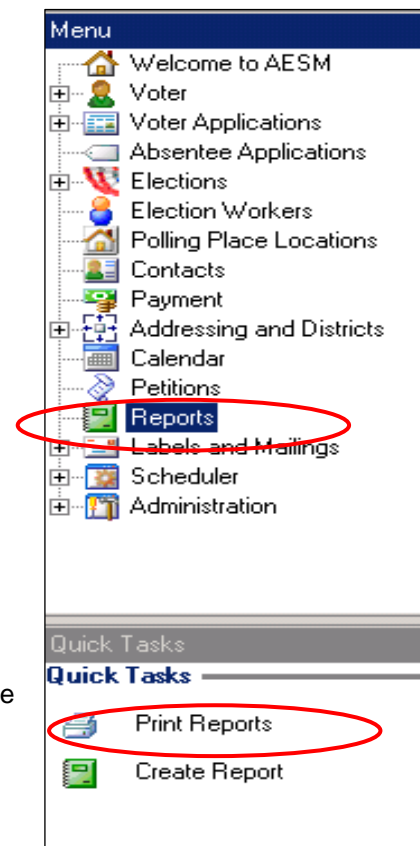
Printing Ad Hoc Reports

- To print an ad hoc report click on the **Reports** node from the menu tree.
- Then click on the **Print Reports** Quick Task.
- Choose the ad hoc report **Category**.

The Ad Hoc Report Categories available are:

- *Absentee*
- *Applications (Voter Apps)*
- *Contacts*
- *Elections*
- *Poll Worker*
- *Polling Place*
- *Voter*
- *My Saved Reports*
- *Saved Reports*
- *System Reports*

Select a **Report** from the list. To see the full title of the report, expand the menu pane or click on the name in the list box. The full title appears below the box.



4. Click **Next**. At this point, **Report Options**, **More Report Options** and **Print Options** are available.
5. Report Options include **Filters** and **Sorts**. [See topics [Custom Filters](#) and [Custom Sorts](#) below.]
6. The **Printer Setup** button allows you to choose a specific printer or enter a name for a file to export it to Excel or PDF.
7. Print Options include **Preview**, **Print Now** or **Schedule**. [See topic on [Print Options](#) in this section.]

The screenshot shows a web-based interface for generating reports. It includes sections for selecting a report, configuring filters and sorts, setting up a printer, and choosing how to print (Preview, Print Now, or Schedule).

Creating Custom Filters for Ad Hoc Reports

A Custom Filter allows you to select the particular records you want to include or exclude on an ad hoc report. Many ad hoc reports will require a filter to make the report more useful.

1. To create a custom filter open the custom **FilterForm** by clicking the **Custom** button next to the filter drop-down box. Note: if you have previously created a filter and saved it, it can be selected from the drop-down menu.

This screenshot shows the 'Report Options' section, specifically the 'Filter' area where users can select a filter from a drop-down menu or click the 'Custom' button to create a new one.

2. Each line of a filter will have 4 entries.

- All lines start with **AND** or **OR**, with the first line always starting with "And".
- The second part is the **Field Name**. These are the names within the system for a data field. Most are pretty easy to figure out, like "StreetName". Some are more complicated.

The screenshot shows the 'FilterForm' window with a table containing filter rules. The table has columns for 'And/Or', 'Field Name', 'Condition', and 'Value'.

And/Or	Field Name	Condition	Value
And	Street Name	Equals	MAIN
And	Street PreDirection	Equals	N(N)



Note: Almost all field names containing "ID" are system generated identification numbers which won't be of use in reporting.

- The third part is the **Condition**. There are 14 choices, including **Equals** and **DoesNotEqual**, **IsGreaterThan**, **IsLessThan**, etc. Some experimenting may be necessary. **Like** can be used to enter a wildcard in the value field, such as A*.

And/Or	Field Name	Condition	Value
And	Street Name	Like	A*
*		IsNotBetween	
		In	
		NotIn	
		IsEmpty	
		IsNotEmpty	
		Like	
		NotLike	

- The fourth part of the statement is the **Value**. Enter the specific data value that you are filtering on. In the example above, only records where the StreetName field is **Like "A"** (starts with the letter A) will be selected for the report. If a field has a limited set of values, those choices may appear in a drop-down list. In the example below, the Voter Status choices are Inactive (INACT), Cancelled (CANC) and Active (ACTIV). There are instances where no Value is required. For the Conditions **IsEmpty** and **IsNotEmpty**, no value is required.


FilterForm

Use Filter Save Save As Delete Clear Close

Filter Name:

RPTView_AESM_AddressRanges

And/Or	Field Name	Condition	Value
And	Voter Status	Equals	Inactive(INACT) Cancelled(CANC) Active(ACTIV)
*			

- After entering a row of criteria for the filter, click on the next blank line. Multiple lines can be entered. Use the blue arrow button to add a line in the filter *above* the selected line and the red X to delete the selected line. To add a line below the current line, click on the next line.. 
- To save the custom filter, enter a **Filter Name**, then click on **Save**. To use the custom filter with or without saving, click **Use Filter..**
- Custom Filters can be reused. Just select the saved filter from the Filter drop down box when running this report again.

Creating Custom Sorts for Ad Hoc Reports

All ad hoc reports are sorted, but the sort order may not be what you require. To change the Sort order of the data, create a Custom sort.



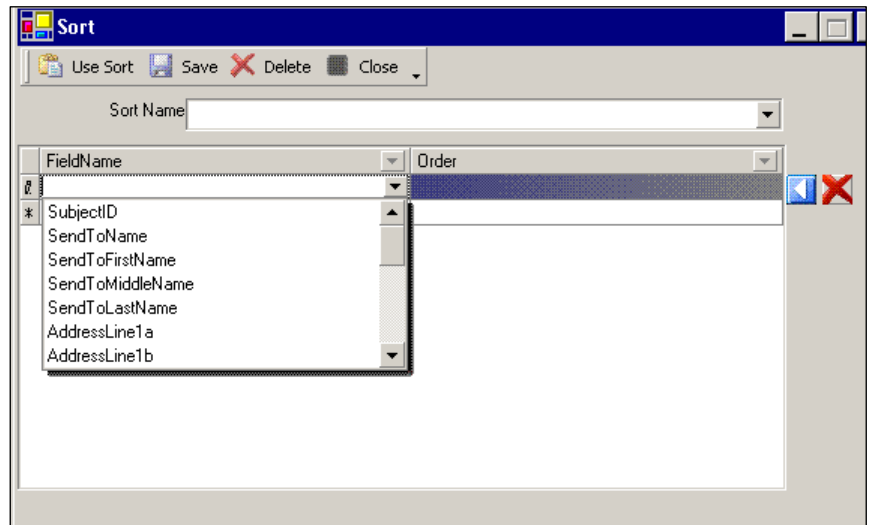
Sort By
(Select Sort) ▼ Custom

1. Open the custom sort form by clicking the **Custom** button next to a **Sort By** drop-down box. If you have previously created and saved a sort for this report, you can select it from the drop-down list.
2. The Sort form allows you to select a **Field Name** and indicate ascending or descending **Order** for each field. Multiple lines of sort can be entered. Use the blue arrow to add a line in the sort above the current line and the red X to delete the selected line.




Note: Multiple lines of Sort Order will create a report sorted first by the top sort order, then subsequently by the next sort statements. Using multiple sort statements creates groups of data in the report.

3. **Save** the sort or **Use the Sort** with or without saving. To Save, enter a name for the sort, and Click Sort. Click "Yes" when it asks if you want to save the changes, then click Use Sort.
4. Continue to **Print Options** section.



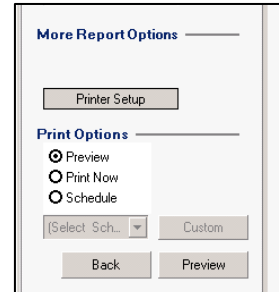
FieldName	Order
SubjectID	
SendToName	
SendToFirstName	
SendToMiddleName	
SendToLastName	
AddressLine1a	
AddressLine1b	

Print Options for Ad Hoc Reports

-  From the Printer Options section, there are 3 choices: **Preview**, **Print Now** and **Schedule**. Within the Print Now option are the choices of printing to a printer or exporting a file. Always check the **Printer Setup** before selecting any of the choices.

Preview

- With the Print Option **Preview** selected, click on the **Preview** button. A report will display online with the warning that not all the data is contained in the preview. This option is useful when trying to determine which report best meets your needs. The format of the report does not always display correctly in the Preview either. The Preview can be printed, but it will only contain the limited data it pulls.



Printer Setup

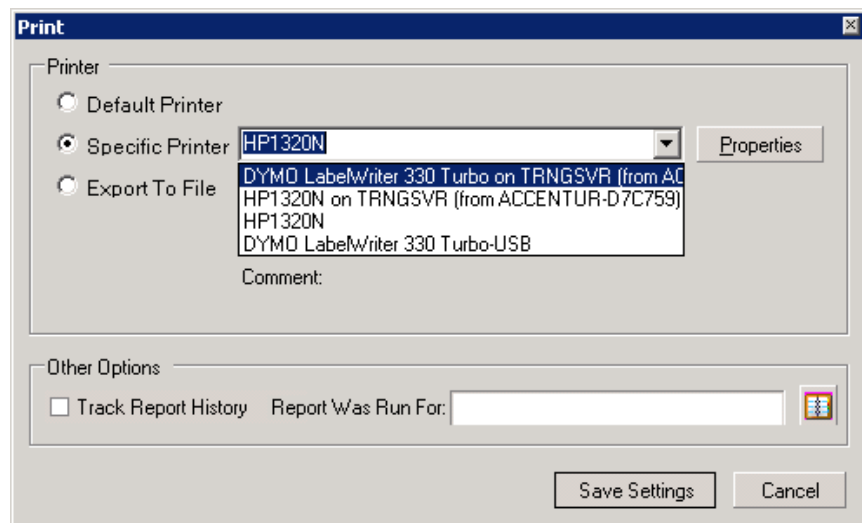
Before using the Print option (which includes exporting), click on **Printer Setup**.



*The settings are saved for a report and will remain until **Printer Setup** is changed and saved again. It is a good practice to check the Setup each time you run a report.*

Print Directly to a Printer

- Select either **Default Printer** or **Specific Printer** and select your printer from the drop-down list. The **Default Printer** is your workstation's default.
- Click on **Save Settings**.



Export to a File

This option can be used to write an ad hoc report to a file that can be saved and printed later, or emailed. The Printer Setup options will be saved and used for this particular report every time the report is run, until they are changed. It is a good practice to always check the Printer Setup options.

1. Open **Printer Setup**.
2. Select **Export to File** and then enter a name for the file.
When the file is created, it will be written to your **My Documents** directory on the SVRS server.

Ad hoc Reports written to the My Documents folder on the SVRS server

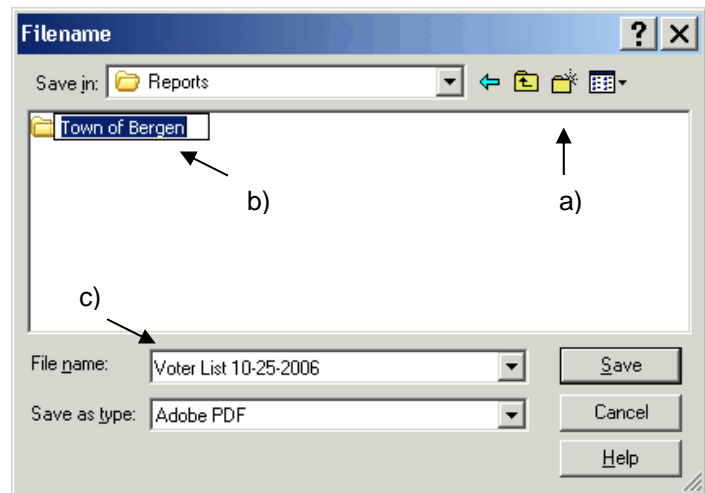
can be saved there as an off-site, secure document storage. A Provider for a group of Reliers might also want to create folders to store the reports and poll books for all of their Reliers, to be retrieved and printed at a later date, or saved on the server. This is recommended by the G.A.B. SVRS team.

To write the file to go directly in the My Documents folder, type the name of the file in the Export File Name box. Folder names can be included, such as "**\Reports\Voter\List of Cancelled Voters**". This names the report "**List of Cancelled Voters**" and exports it to **My Documents\Reports\Voter** folder

To create a folder on My Documents, under the Export To File option, Click on **Browse** button. This displays the folders and files on **My Documents**.

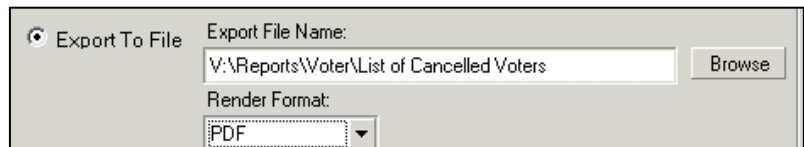
Navigate to the directory or folder where the new folder will be located. In this example, the new folder will be in a directory named *Reports*.

- a) Click on the **New Folder** button.
- b) Enter a name for the folder.
- c) Enter the name for the file.



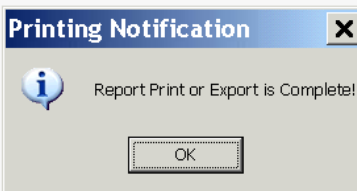
A file can also be written directly to your workstation, if the system is not busy, and you have the correct permission or rights to the workstation. In front of the file name, put **V:** to write directly to a specific folder on your **C:** drive. However, if the file is too large or the system is too busy, the file will not generated and will fail to write directly to your C drive.

3. Select the format from the **Render Format** drop-down box, such as PDF or Excel.
4. Click on **Save Settings**.

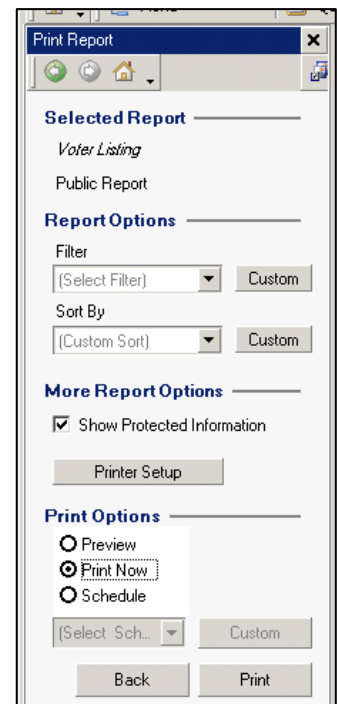


Print Now

1. Select **Print Now**.
2. Check your Printer Settings. (if you have not just done so!)
3. Click on **Print**. Unless the system is too busy or your report is large, the report should go directly to the selected printer or the exported file. A message box will appear telling you that the report has printed. There is a maximum of 65,000 lines for a report. To run a report that exceeds this limit, contact the SVRS Help Desk.
4. Click **OK**.



Note: If the system is busy, another message box may appear telling you that you can cancel or send the print job to the Scheduler. If you choose the scheduler, a PDF copy of the report will be written to the My Documents folder on the server. See section "Retrieving files" to access the report.



Scheduling Ad hoc Reports

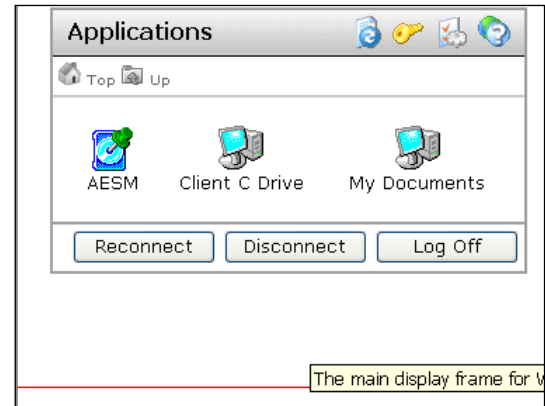
An ad hoc report can be sent to the scheduler due to high volume on the server, or by choice. The report can be scheduled to run at a specific time and frequency.

1. To send an ad hoc report to the scheduler directly, in the Print Options panel, select **Schedule**.
2. Click on **Custom** button to open the **Schedule Details** form. If a schedule has been created and saved, it can be selected from the drop-down box.
3. Select the details on when and how often the report should run. To run the report one time only, select Daily, and enter a time and End Date.
4. Click on **Save and Close**. The report will use the **Printer Setup** options, to print direct or export. Check the **Printer Setup** before proceeding.
5. Click **Schedule** to complete.

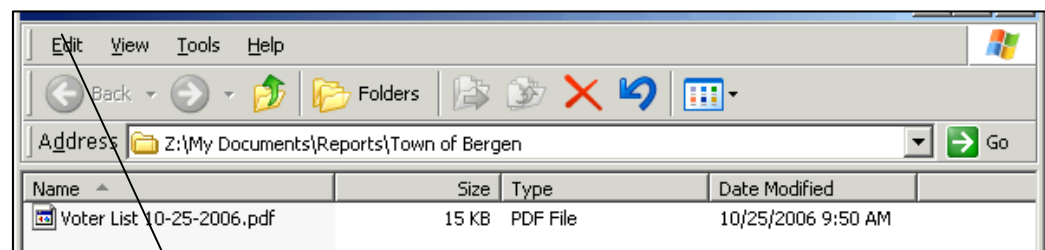
Retrieving Ad Hoc Reports exported or sent through the Scheduler

Return to your web browser at <http://svrs.wi.gov> and log in to SVRS (Citrix). Three icons are in the Applications window; AESM (the SVRS application), **My Documents** (personal folder on the SVRS system) and an icon for your **Client C Drive** (local drive).

There are two options for retrieving the files. You can **Copy** the files to your hard drive, or you can **Move** the files to your hard drive. Copying leaves the original file on My Documents. Moving does not leave a copy. Note that you cannot open a file on My Documents, only from your local drive.

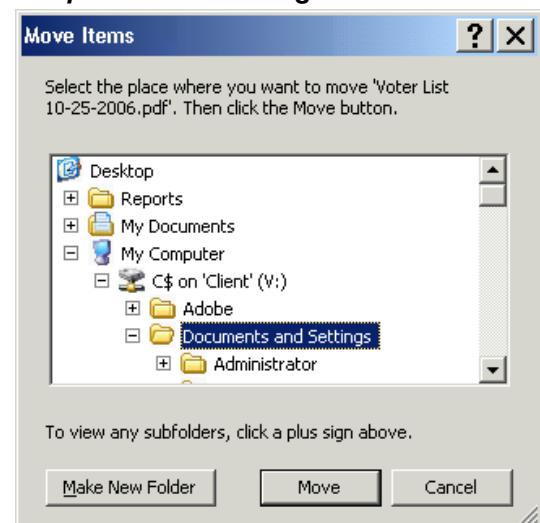
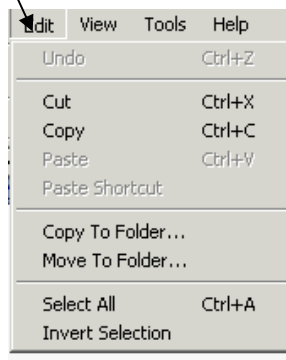


1. First, click on the **My Documents** icon, where you will see **Z:\My Documents** and listed below should be your report or file. If you have created special folders for your reports, mailings or poll books, navigate to the correct folder.



In this example, the exported report file is found in **Z:\MyDocuments\Reports\Town of Bergen**

2. Click on the file name to select it. Click on **Edit** in the menu bar.
 - Select **Copy to Folder** to copy the file to your workstation or a network directory. The original file remains on **My Documents**.
 - Select **Move to Folder** to move the file. This removes it from **My Documents**.



3. Navigate on your system to the directory you want to store the file and click **Move** or **Copy** as appropriate. The option to **Make a New Folder** is also available.



If you work in an environment that uses network directories only (no access to update your workstation) or have conflicts with your own Citrix environment, your IT staff may have to help you.

4. To print, navigate on your workstation to the file, select it, and then print.

Modifying Ad hoc Reports

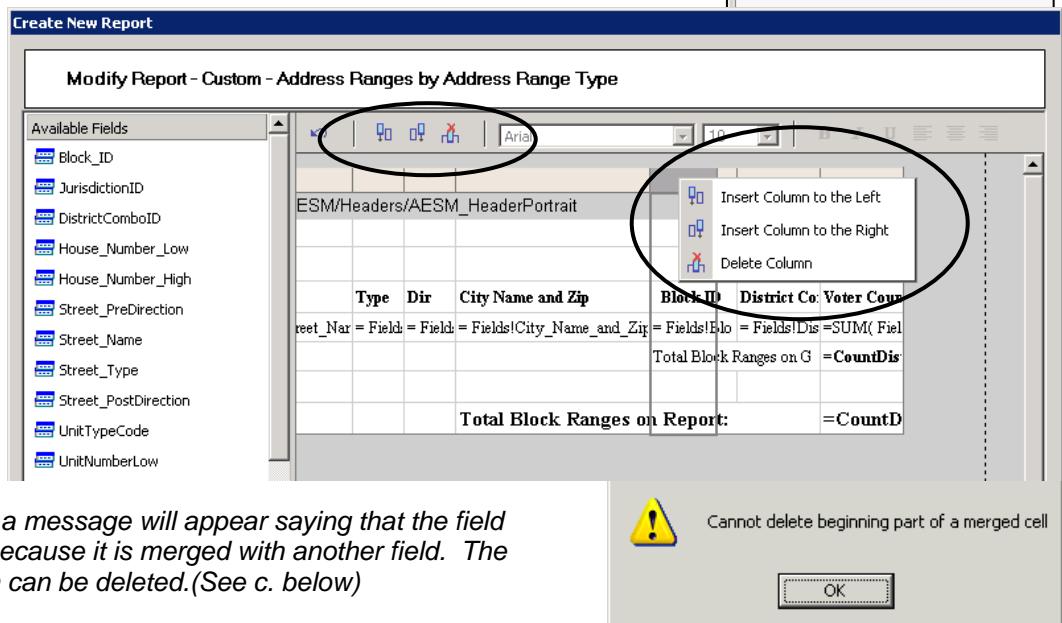
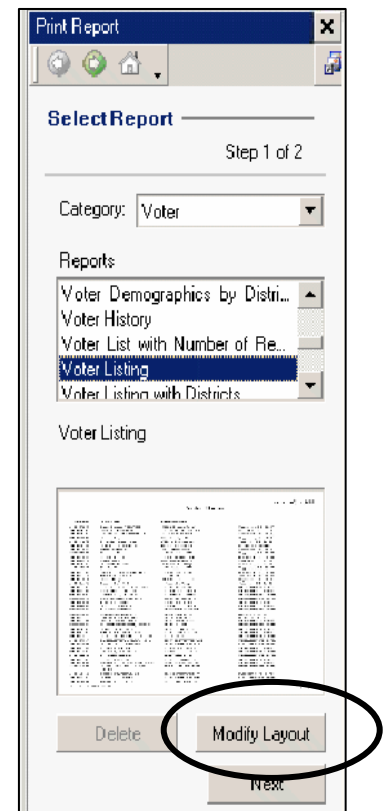
- ☒ The single way to modify an ad hoc report in SVRS is to change the report's existing layout, using the Print Reports Quick Task.

Modifying Layout

1. To modify an ad hoc report's layout, first select **Reports** node, then the Quick Task of **Print Reports**.
2. Select the **Category** and the **Report**, then click **Modify Layout**.

Note: Due to the complexity of some reports, the Modify Layout option is not available and will be grayed out.

3. The **Create New Report** form appears, with the selected report's layout is displayed.
4. At this point, fields can be added to the report, or deleted from the report.
 - a. To delete a field **column**, right click at the top of the column above the data field. A menu will appear with the options to Insert Column to Left, Insert Column to Right or Delete Column. Alternatively, when a column is selected, the options appear as icons above the report. Select **Delete Column**.



Note: sometimes a message will appear saying that the field cannot be deleted, because it is merged with another field. The values in the column can be deleted. (See c. below)

- b. To add a column, right click at the top of the column to the left or right of where the new column will be placed on the report. Select the correct option (**Insert Column to Left** or **Insert Column to the Right**).

- c. To delete a field, but keep the column to use for another data field, click in the cell that contains the field name, highlight the name and delete. Do the same for the title in the cell above. In the example below, the field name has been selected and can now be deleted. This will leave an empty cell which can be used for a new data field.

- d. Move a new data field into the report. Drag and drop the actual data field from the panel on the left, **Available Fields**, to the cell below the title. It will be reformatted to code that will retrieve the data and insert into it the report at this location.

- e. Edit the **Title**. This appears above the data field. The text will be bold.

5. To format the font, click on each section (name of title or the data field in the report) and select the font, font size, **B**, *I* or U, etc. The justification (left, right or center) can also be set for each data field.

6. When the data has been selected and formatted, click **Next>>** to continue the Wizard.

7. Name the report. The name will appear as the Title of the Report. If the report is saved, this will also be used for the name of the Report under the Saved Reports or My Saved Reports category. The name must be unique within your jurisdiction.

8. A custom filter and custom sort can be created and saved with the report. Alternatively, the report can be filtered and sorted at the time it is run. Using the fields available for this category, you can create the filter and sorts required and save. Click **Next>>** to continue.
9. The **Save and Print Preview** form allows you to save your modified report and Preview.

10. To Preview, Click **Preview Report**. Below is an example of the Address Range report, reformatted and reduced by two columns of data.

Preview

Warning! Previews are limited to a maximum number of 50 records. However, due to groupings on selected records, reports may show less than the maximum number of records found in the database.

1 of 1 100% Find | Next Select a format Export

STATE OF WISCONSIN 200677-USE-171-U
7/7/2006 9:33:36 AM

Custom - Address Ranges by Address Range Type

Residential

OEB	House Range	Dir	Name	Type	Dir	City Name and Zip	District Combo	Voter Count
O	7483 to 7483		100 MILE GROVE	RD		DANE, 53529	13064-002-1	3
E	7520 to 7520		100 MILE GROVE	RD		DANE, 53529	13064-002-1	2
O	2509 to 3021		10TH	ST		MONROE, 53566	23251-002-0	3
E	810 to 1114		10TH	ST		MONROE, 53566	23251-009-0	4
O	711 to 1221		10TH	ST		MONROE, 53566	23251-009-0	5
O	1603 to 2007		10TH	AVE		MONROE, 53566	23251-006-0	3
E	1302 to 1910		10TH	ST		MONROE, 53566	23251-007-0	4
E	2504 to 3020		10TH	ST		MONROE, 53566	23251-002-0	8
E	2100 to 2650		10TH	AVE		MONROE, 53566	23251-005-0	7
E	2004 to 2426		10TH	ST		MONROE, 53566	23251-004-0	3
O	2205 to 2653		10TH	AVE		MONROE, 53566	23251-005-0	5

11. When the report is ready for printing, it must be saved first. Click on the **Save report for future use** box, then select the Category. There are two options: **Save for Me Only** will save the report under the **My Saved Reports** category, **Save for Everyone's Use** will save the report under the **Saved Reports** category and it will be available to everyone in your jurisdiction.
12. Click **Finish** to complete. The modified report is now available to run.
13. To print or export the modified report, select the report Category **My Saved Reports** or **Saved Reports**.
14. Select the report – name should appear on the list of reports. Click **Next**.
15. The **Print options** are now available – you can print your report directly, export it or schedule for later, just like any other report.

Select Report Step 1 of 2

Category: **My Saved Reports**

Reports

Registered Voters

Registered Voters

Delete Modify Layout Next



Listed below are commonly used SVRS reports and where you can locate instructions in the application manual for generating, filtering, sorting, and printing them. Also listed are definitions and help tips (*if any*) for each report.

Most Commonly Used SVRS Reports:

Report	Report Category and Definition	Helpful Tips (<i>if any</i>)	SVRS Application Manual
1. Voter Transfer	SVRS data grid report generated from the Voter Transfer node. Report shows those voters that have moved to a new municipality and submitted a new registration application.	This report should be generated regularly to track all voters who moved out of your jurisdiction.	See <i>Maintaining Voter Record</i> , page 21
2. Voter Listing	SVRS ad hoc report located in the voter category. Report returns a list of registered voters, regardless of status.	This report can be generated from both the municipal and county jurisdictional levels in SVRS.	See <i>Maintaining Voter Record</i> , page 24
4. Merged Voter Information	SVRS ad hoc report located in the voter category. Report displays any voter records that have been removed from your jurisdiction through the voter merge process in SVRS.	This report can be generated from both the municipal and county jurisdictional levels in SVRS.	See <i>Maintaining Voter Record</i> , page 20
5. WI HAVA Check	SVRS ad hoc report located in the voter category. Report tracks the HAVA check results for a municipality.	This report can be generated from both the municipal and county jurisdictional levels in SVRS.	See <i>HAVA Interfaces</i> , page 2
6. WI Voter Match	SVRS ad hoc report located in the voter category.		See <i>HAVA Interfaces</i> , page 9
7. WI Voter Participation	SVRS ad hoc report located in the voter category. Report lists the name, address, ballot style description and ward for each voter who cast a vote in a particular election.	Report can be used to help reconcile vote counts recorded after an election.	See <i>Post Election Activities</i> , page 17
8. Address Ranges by Address Range Type	SVRS ad hoc report located in the voter category. Report lists the address ranges in SVRS for a particular jurisdiction.		See <i>Address Ranges</i> , page 17

Report	Report Category and Definition	Helpful Tips (if any)	SVRS Application Manual
9. Voters with No District Combination	SVRS ad hoc report located in the voter category. Report lists all voters whose district combination is equal to 1, and residential address is not validated in the system.	This report should be run before every election as voters on this report will not appear on a poll list.	See <i>Address Ranges</i> , page 19
10. District Combo Listing	SVRS ad hoc report located in the polling place category. Report lists the district code for each district that makes up a district combination in SVRS.		See <i>Districts and Offices Type</i> , page 14
11. Polling Place Listing	SVRS ad hoc report located in the polling place category. Report generates a list of polling places for a municipality or county.		See <i>Polling Places Section</i> , page 6
12. Wisconsin Election Data Collection System (WEDCS)	Electronic form of the GAB-190 generated outside of the SVRS system.		See <i>WEDCS</i> , page 6
13. Absentee Application Listing	SVRS ad hoc report located in the absentee category. Report lists absentee applications entered in SVRS by Election. Within each Election, applications are organized by Application Type.	Report can be used to manage Permanent Absentee voters who have not returned a ballot for a specific election.	See <i>Absentee Application</i> , page 15
14. WI Absentee Application Ballot Log	SVRS ad hoc report located in the absentee category. Report lists, by election, the Name of each Absentee Applicant, along with the Application Type, the Applicants Address and Ward, when the Application was received, the Ballot Issued, the Ballot Returned, the Date the vote was recorded for that Applicant, and the Applicants Ballot Style Description for that election.	Report should be generated before an election and distributed to the polling place to help track absentee ballots on Election Day.	See <i>Absentee Ballot</i> , page 27
15. Vote Count by Voting Method	SVRS ad hoc report located under the Elections Category. Report shows the number of votes cast in an election, broken down by ward. Within each ward, shows whether the vote was recorded as being cast At the Polls, Absentee, or Other.	Report can be used to help reconcile vote counts recorded after an election	See <i>Post Election Activities</i> , page 15