

TUTORIAL: SECTION 1 - CREATING THE VOTER LIST

Step 1: Create an accurate voter list

- Log onto the NAWGJ membership portal. Make sure you are in "Admin" view.
- Click the **Contacts** tab at the top.
- Click the **Advanced Search** tab.
- Click the **Add Criteria** tab (green cross).
- Choose **State** from the drop-down menu and click OK at the bottom.
- Click again on the **Add Criteria** cross.
- Scroll down to the **Membership related** area.
- Check **Rating**, **Member Status**, and **Member Since**.
- Click OK at the bottom. This takes you back to the **Advanced Search** page. You should now have four criteria selected: **State**, **Rating**, **Member Status** and **Member Since**.

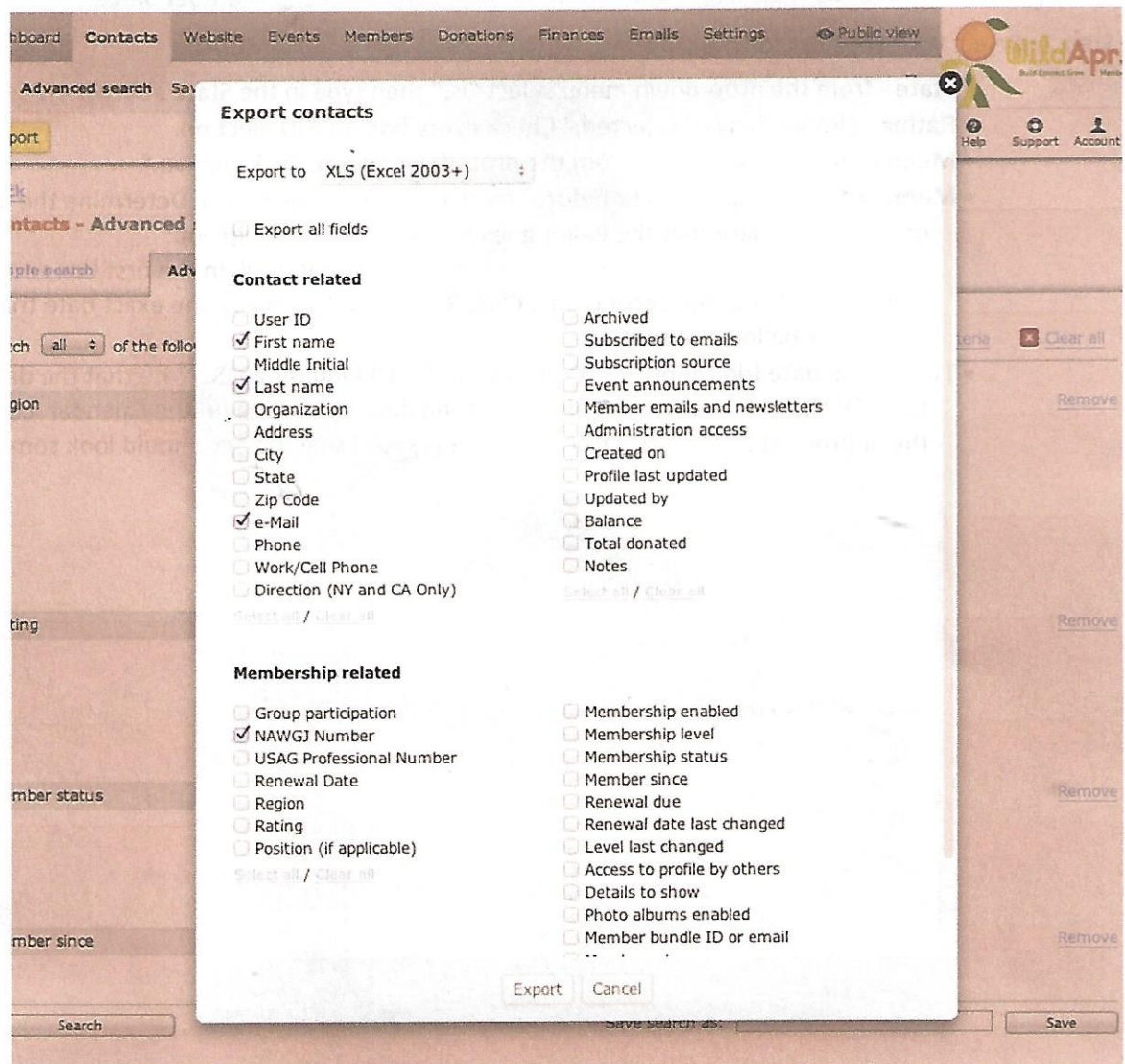
Step 2: Select your specifics for the criteria:

- **State** - from the drop-down menu select "is," then type in the State abbreviation (e.g. ID or TX).
- **Rating** - choose "any of selected." Check every box for SJD election.
- **Member Status** - select "is" from the drop-down menu. Click "Active."
- **Member Since** - select "on or before" from the drop-down menu. Determine the date: 90 days on or before the date that the Ballot goes out. This site can help you: <http://www.convertunits.com/dates/daysfromdate>. Put -90 in the first box and the date the ballots are sent in the second box. Click **GO**. This will give you the exact date that is 90 days before the ballots are sent.
- Type in the date (dd Month YYYY - for example: 10 January 2015. Note that the date is DAY then MONTH then YEAR). You can also select the date by clicking on the calendar icon and scrolling to the appropriate date. At this point your advanced search page should look something like this:

The screenshot shows the 'Advanced search' interface. At the top right, there are 'Export', 'Help', and 'Support' links. Below the navigation bar, there are tabs for 'Simple search', 'Advanced search', and 'Saved searches'. The 'Advanced search' tab is active. The search criteria are listed as follows:

Criteria	Operator	Value	Action
State	is	ok	Remove
Rating	any of selected	<input checked="" type="checkbox"/> 4/5 <input checked="" type="checkbox"/> 6/7/8 <input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> National <input checked="" type="checkbox"/> Brevet <input checked="" type="checkbox"/> High School	Remove
Member status	is	<input checked="" type="radio"/> Active <input type="radio"/> Lapsed <input type="radio"/> Pending - Renewal <input type="radio"/> Pending - New <input type="radio"/> Pending - Level change	Remove
Member since	on or before	10 January 2015	Remove

- Click **SEARCH** at the bottom.
- Scroll down and you will see list of all the judges in that State who meet the criteria to receive a ballot for the SJD election.
- Now, go back to the top of the membership page. You will see a green rectangle on the top left that says **EXPORT**. Click this button. A window pops up called **Export Contacts**.
- Under **Export To** select **XLS** from the drop-down.
- Unless you want every detail about every judge on your list, you will have to select specific data that you want to export. The easiest way to do this is find the **Clear All** link below the contact related and membership related areas. Click on **Clear All** for both. Now you can select exactly what you need.
- Under "Contact related" check: **First name, Last name, e-mail**.
- Under "Membership related" check: **NAWGJ number**. These are the identifiers that each voter will need to log on and vote.



- Click **Export** at the bottom of the page. A window will pop up to indicate the export file is ready. Depending on how your computer is set up, navigate to the file (it will have a long name with the date: e.g. 2015-01-13 Contacts NAWGJ.....xls). You have just exported your voter list as an Excel file.
- Now open that Excel file. You should have a list with the first row of **First name, Last name, E-Mail, and NAWGJ number.**

	A	B	C	D	E
	First name	Last name	e-Mail	NAWGJ Number	
1	JENNY	AMOS	amos6_@hotmail.com	8610834	
2	MARY	ATKINSON	mary1atkinson@gmail.com	8610842	
3	CHERYL	BAITS	cibaits1@msn.com	8610847	
4	Ashly	BAKER	slaregymhouston@aol.com	8610849	
5	LAURIE ANN	BALERUD	labalerud@gmail.com	8610850	
6	SARAH	BERDOZA	sarah.berdoza@gmail.com	8610854	

- Preview judges list. Make sure each member has a valid e-mail address and NAWGJ number listed.
- Now you must **save** this file as a **.csv file**. Go to File>Save as> **Windows comma separated file (.csv)**. Give the file a shorter name if you want (such as *SJD Voter Roster 2015*) and choose where you will save the file, such as a special election folder, on the desktop. Click **save**.
- This file looks just like the Excel file except it says **nameofyourfile.csv** instead of **nameofyourfile.xls**. You now have a voter list that is ready to upload (import)