



U.S. ELECTION ASSISTANCE COMMISSION
2014 Election Administration and Voting Survey

Guide to Using the
2014 Election Administration and Voting Survey
Data Entry Template

U.S. ELECTION ASSISTANCE COMMISSION

2014 EAVS Data Entry Template Instructions

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Introduction

We've created the 2014 Election Administration and Voting Survey (EAVS) Data Entry Template for you to supply the information that the Election Assistance Commission (EAC) has requested about the 2014 election cycle. This year's template functions very similarly to the 2012 template.

The most significant *changes* concern the organization of two of the survey sections:

- Section B has been expanded from 19 to 35 items (with additional subcategories for some items). The additional 16 items are at the end of Section B (B20-B35), and are taken from the Federal Voting Assistance Program's (FVAP) Survey of Local Election Officials. These items were incorporated into the 2014 EAVS to eliminate redundancies between the two data collection efforts. As a result, the FVAP Survey of Local Election Officials will not be conducted this year.
- Section F has been split into two separate worksheets in the template. Items F1-F6 are in one worksheet, and items F7 (voting equipment) and F8 (general comments) are on a separate worksheet.

Similar to the 2012 template, this year's data entry template includes the following features:

- **Flexible data entry** – The template offers you the choice of two different “views” for entering the EAVS questionnaire data:
 - The “Form View” that permits you to enter the information one jurisdiction at a time using preformatted forms, and
 - The “Worksheet View” that permits you to enter data in your own fashion, using a spreadsheet grid with each jurisdiction on a separate row, and each questionnaire item in a separate column.

You can switch between the two views at any time – the data you enter will be there regardless of which view you are currently using or have used before.

- **Extensive error checking in Form View and Worksheet View** – the template checks for over 100 possible errors in the information you enter for each jurisdiction.
- **Optional marking of errors as “not errors”** – we understand that the template may mark a response as an error when, for a specific jurisdiction, the response is actually correct. When working in Form View, the template permits you to mark such items as “not an error.”
- **Pre-populated jurisdictions** – The template contains all of your jurisdictions for which the EAC needs information. If you find that we have made a mistake in the jurisdiction list built into the template, contact us before starting, and we will update the template for you.

- **Formulas built in to calculate item totals** – There are some survey questions that are calculated by finding the sum of a certain range of values. For example, the question labeled “A5Total” is equal to the sum of the values found in questions A5b through A5l. We have built in formulas, in both Form View and Worksheet View, to calculate these totals automatically. As a result, for example, you won’t need to manually calculate the sum of A5b through A5l; the sum will be automatically entered in A5Total.

The rest of these instructions describe how to start the Data Entry Template, how to save your work periodically so that you do not have to enter all of the data at once, and how to take advantage of the two different data entry views. These instructions will also show you how to submit your data electronically when you have finished entering the information for all of your jurisdictions.

It is probably a good idea to keep a copy of the 2014 EAVS Questionnaire nearby so that you can refer to the full description of each question when you are entering the data. In addition, the Supplemental Instructions Manual provides many helpful definitions and specific instructions that will help you collect the data that you will be entering into the Data Entry Template.

A brief tutorial for novice and beginner users of Excel is also found in the appendix. If you have questions about using Excel in general or about any aspects of the template in particular, please call or email your point-of-contact at ICF International.

Getting Started

The 2014 EAVS Data Entry Template is an application that has been developed in Microsoft Excel. In order for you to use the Data Entry Template, it is recommended that you have Microsoft Excel 2007, 2010, or 2013 installed on your computer. If you are using Microsoft Excel 2003 or earlier, the Data Entry Template should still work. Unfortunately, however, the template has not been tested on this version of Excel. If you are using Excel 2003 or earlier and you encounter difficulty using the template, please contact your point-of-contact at ICF International for assistance.

If you need help identifying which version of Excel you have, refer to the appendix at the end of this guide.

Opening and Saving the Template

To open the Data Entry Template the first time, you will need to download it from ICF's FTP site. Once you log into the site using the link provided in our email, click on the "2014 EAVS Data Entry Template.xls" link to download the file and open it. You then need to save the file to your computer before proceeding further.

To save, first select "Save As" to save the file to a local folder (e.g., "Desktop") on your computer. If you save the file somewhere other than a local folder – such as a network folder – you may have trouble saving the file later.

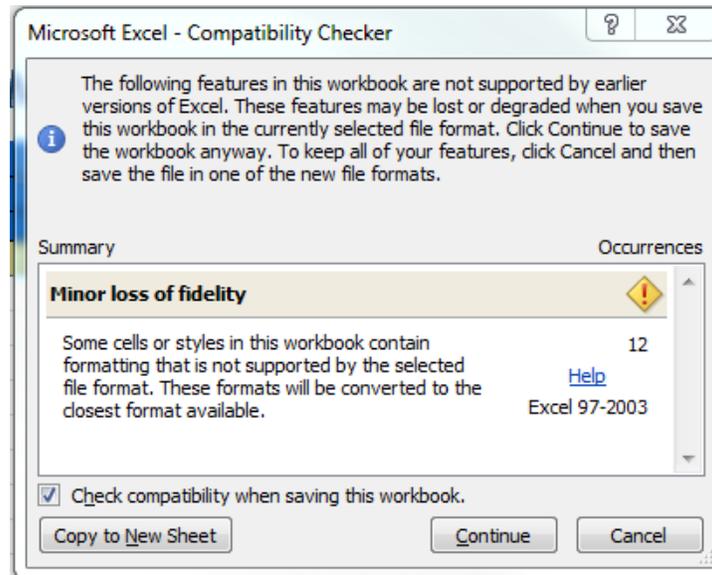
If you are working in any Excel version besides 2003, you will need to save it as an Excel 97-2003 Workbook with an ".xls" filename extension. Click "Save As" and select "Excel 97-2003 Workbook". Saving the file as an Excel 97-2003 file will help you to continue to work with the Form view and the error checking. If you are working in Excel 2003, you can save the file as you normally would an Excel workbook. You may save the workbook under any name that you prefer – but make sure to use a name that you can remember easily.

Once you have used "Save As" to save the template to your desired location, thereafter you need to only select "Save" (and not "Save As") to save the template again. It is a good idea to save the file frequently, especially considering that the "Undo" and "Redo" features are not available in the Data Entry Template (see page 21 for more information about this).

For more detailed instructions on saving files in Excel, refer to the appendix at the end of this guide.

Click Past the Compatibility Checker

If you have Excel 2007, 2010, or 2013, you will see the following message after saving the file:



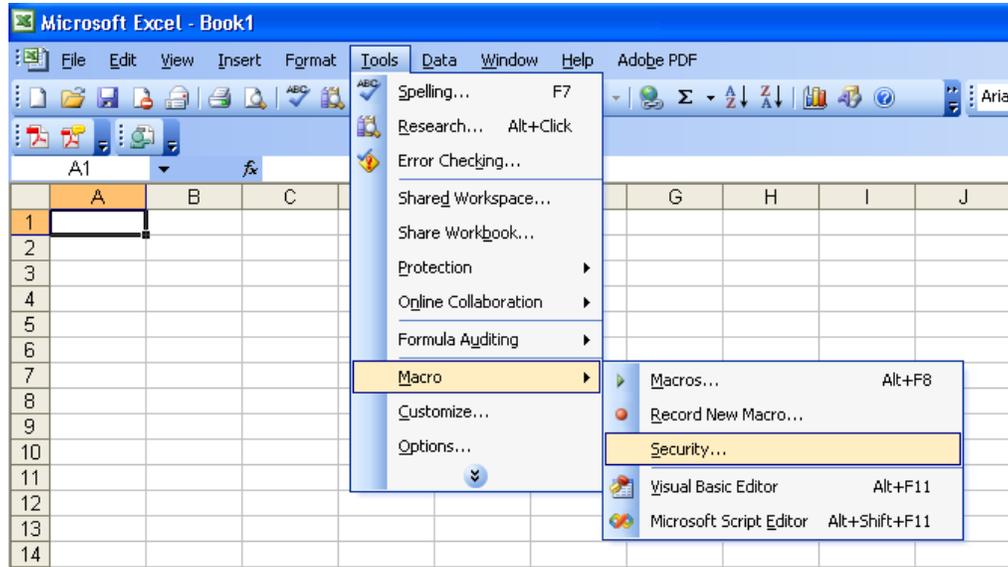
This is expected. It is not an issue and will not prevent you from working with the template. Click “Continue” to move past this warning. You can also uncheck the “Check compatibility when saving this workbook” box to prevent this message from appearing again when saving the file in the future.

Enabling Macros in Microsoft Excel 2003

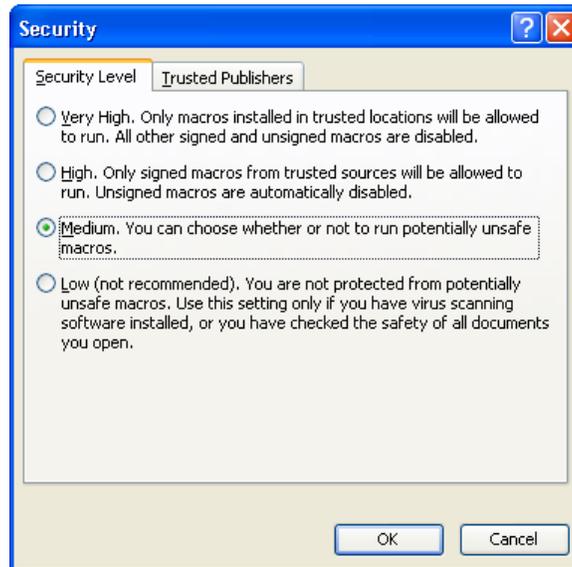
For the Data Entry Template to work properly, you need to ensure that Excel's Macro capability is turned **ON**. The specific steps you need to take to accomplish this vary with the version of Excel you are using.

If you are using Microsoft Excel 2003, use the following steps to enable Macros:

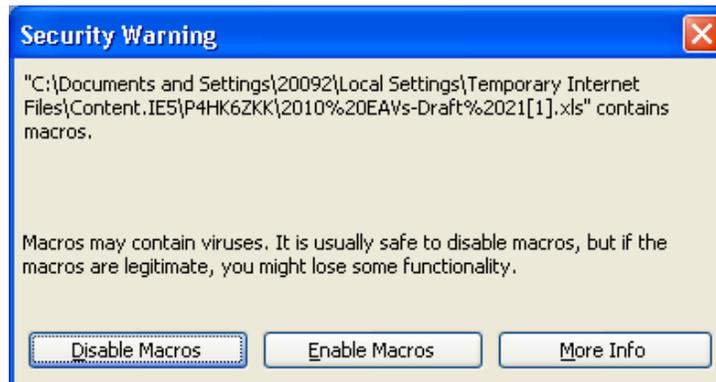
- Step 1:** Open up Excel. You can open up a blank workbook or open up the Data Entry Template. Click on "Tools," then "Macro" and "Security."



Step 2: Once you click **Security**, a window will open. Select “Medium” security and then click on “OK.”



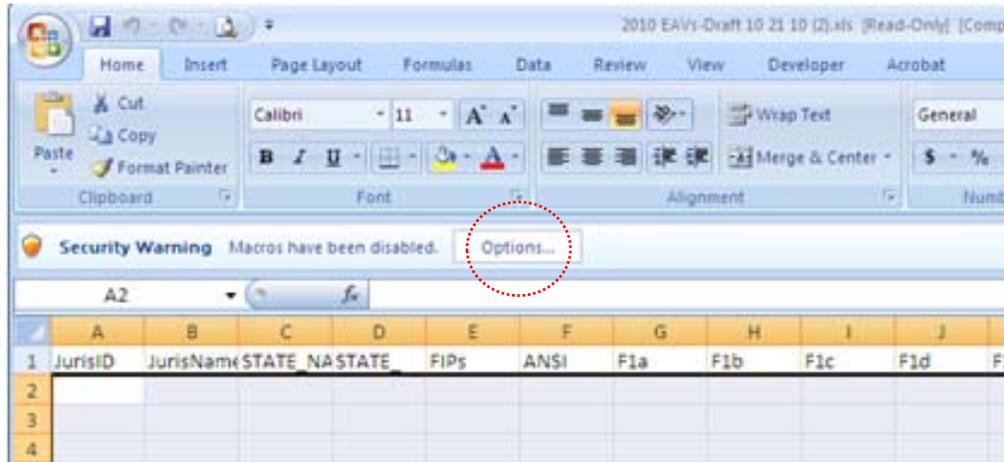
Step 3: Once you have selected “Medium” security, you will need to close Excel. After exiting Excel, open up the Data Entry Template. When you open the template this time, a Security Warning window will appear. Click “Enable Macros.”



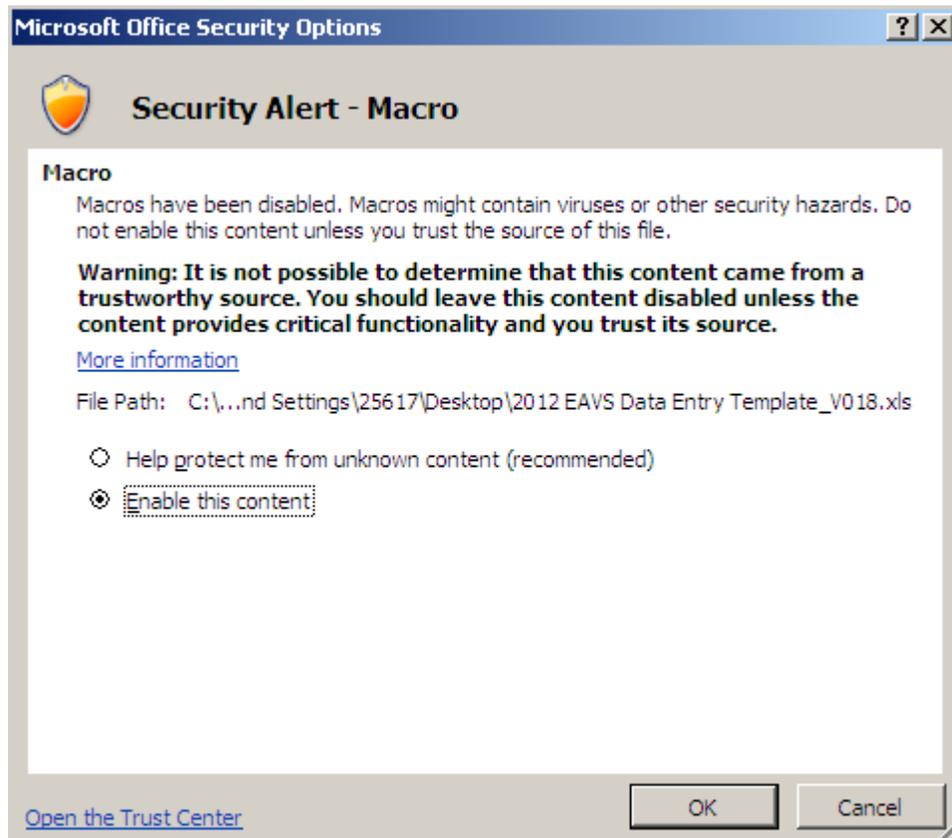
Enabling Macros in Microsoft Excel 2007

If you are using Microsoft Excel 2007, take the following steps to enable Macros.

- Step 1:** Click the “Options” button next to the “Security Warning” that is below the Office Ribbon



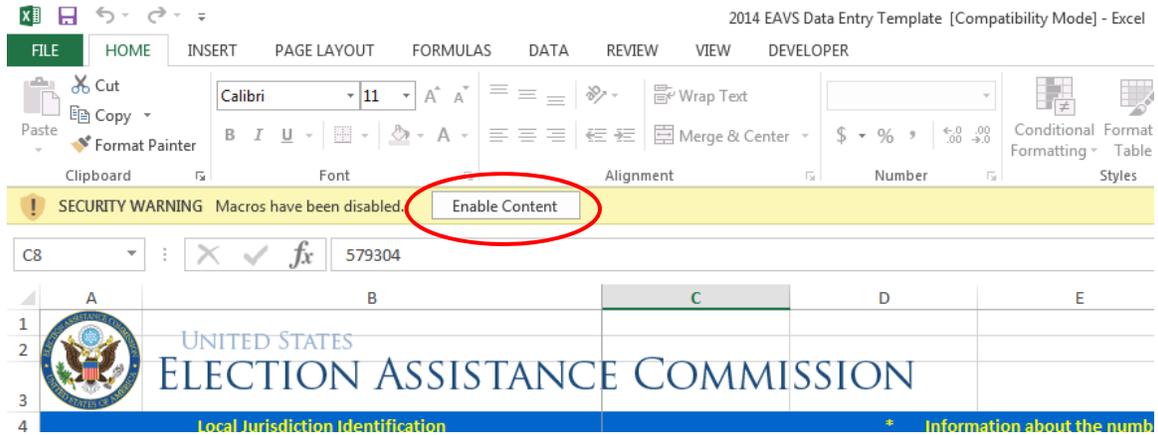
- Step 2:** In the pop-up box that appears, click “Enable this content” and click on “OK”



Enabling Macros in Microsoft Excel 2010 and 2013

If you are using Microsoft Excel 2010 or 2013, you only need to take one step to enable Macros:

Open the workbook and click on the “Enable Content” button next to the “Security Warning” below the office ribbon.



With the macros now enabled, you are ready to begin entering the information for the 2014 EAVS questionnaire. The two different views are described below, beginning with Form View.

The Form View

The picture below shows the first page of the Form View.

The screenshot displays the 'EAVS Desktop Launch' window within an Excel spreadsheet. The window title is '2014 Election Administration & Voting Survey'. The header features the United States Election Assistance Commission logo and name. The main content area contains the following text:

2014 Election Administration & Voting Survey

The ongoing process of improving America's election systems relies in part on having accurate data about the way Americans cast their ballots. In 2002, Congress chartered the U.S. Election Assistance Commission (EAC) to collect information on the state of American elections and make it widely available to policy makers, advocates, scholars, journalists and the general public. Since 2004, the Commission has sponsored a biennial survey as its primary tool for fulfilling that mission. We are pleased to present the 2014 Election Administration and Voting Survey, and we ask for your help in making it the most complete and accurate survey in its history.

The questions below ask for information about ballots cast, voter registration, overseas and military voting, Election Day activities; voting technology, and other important issues. The section concerning the Uniformed and Overseas Citizens Voting Act (UOCAVA) serves as the EAC's standardized format for State reporting of UOCAVA voting information as required by 42 U.S.C. §1973ff-1. States that complete and timely submit this section to the EAC will fulfill their UOCAVA reporting requirement under 42 U.S.C. §1973ff-1(c). Additionally, EAC is mandated by the National Voter Registration Act (NVRA) to collection information from States concerning the impact of that statute on the administration of Federal elections. With this information, EAC is required to make a report to Congress and provide recommendations for the improvement of Federal and State procedures, forms, and other NVRA matters. States that timely respond to all questions in this survey concerning voter registration related matters will meet their NVRA reporting requirements under 42 U.S.C. § 1973gg-7 and EAC regulations.

The EAC recognizes the burden that asking for these data places on State and local election officials, and we have worked to minimize that burden as much as possible.

In advance, we thank you for your cooperation and look forward to answering any questions you might have.

Below the text is a form with a 'State' dropdown menu set to 'MD' and an empty 'County' dropdown menu. To the right are buttons for 'Click to Launch Section' with options A through F: A. Voter Registration, B. UOCAVA, C. Domestic Absentee, D. Election Administration, E. Provisional Ballots, and F. Election Day Activities. Further right are 'Worksheet View', 'Save', 'State Error Check', and 'Submit' buttons.

The spreadsheet background shows a table with columns for 'FIPS Code' and 'Jurisdiction'. The 'FIPS Code' column contains values from 2400100000 to 2403500000. The 'Jurisdiction' column lists various counties in Maryland, such as ALLEGANY COUNTY, ANNE ARUNDEL COUNTY, BALTIMORE COUNTY, CALVERT COUNTY, CAROLINE COUNTY, CARROLL COUNTY, CECIL COUNTY, CHARLES COUNTY, DORCHESTER COUNTY, FREDERICK COUNTY, GARRETT COUNTY, HARFORD COUNTY, HOWARD COUNTY, KENT COUNTY, MONTGOMERY COUNTY, PRINCE GEORGES COUNTY, and QUEEN ANNES COUNTY.

Once Macros are enabled, the first page of the Form View will appear. Throughout the Data Entry Template, this screen is referred to as the “EAVS Home.” If you click on an “EAVS Home” button, it will return you to this screen.

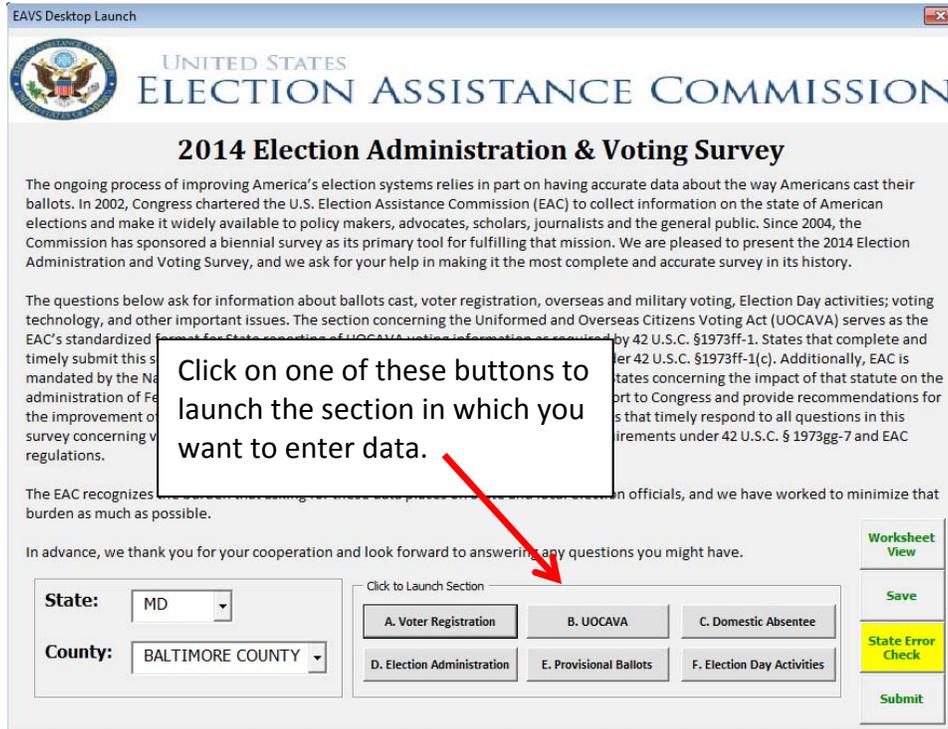
To use the Form View, first use the drop down menus for “State” and “County” to select your state, territory or the District and then select your jurisdiction.

Entering Data in Form View

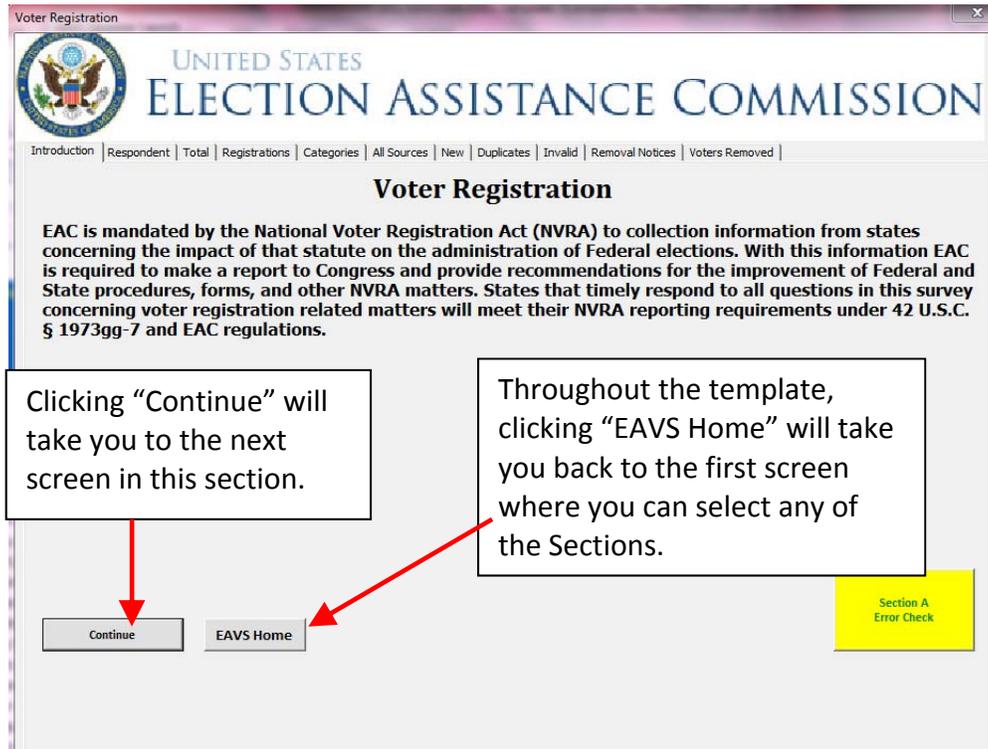
Note: For Alaska, the District of Columbia, American Samoa, Guam, Puerto Rico and the U.S. Virgin Islands, you still need to select your jurisdiction name under “County” even though you are responding for only one jurisdiction.

After selecting your state and the jurisdiction for which you will be entering data, you will see all of the jurisdictions in your state appear in the worksheet behind the first page of the form. The data that you enter in the tabs of the form will appear and be stored in the worksheet. You will be able to enter and edit data in either Form View or Worksheet View.

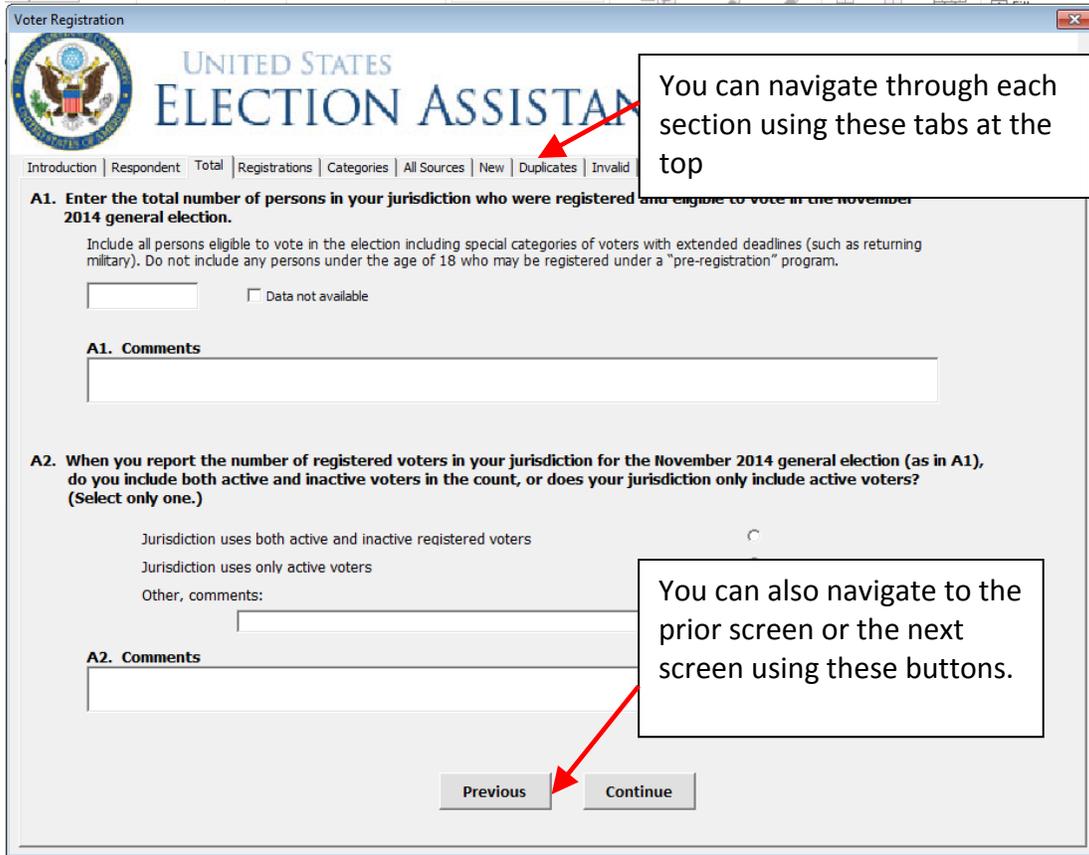
To begin entering data for the selected jurisdiction, click on one of the tabs to launch the EAVS Questionnaire section you would like to complete. You can select any section; you do not have to begin with Section A.



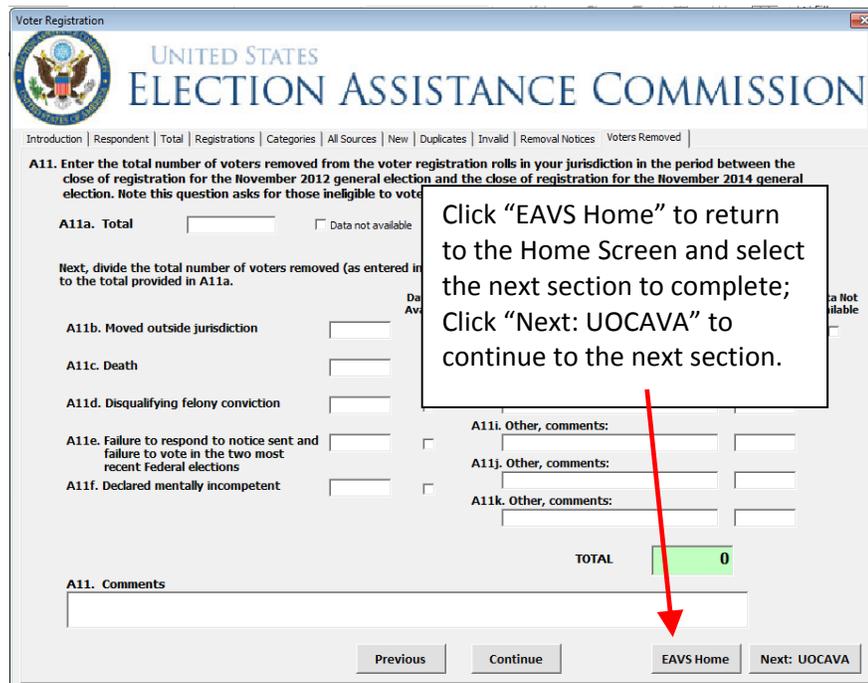
The first tab of each section will look like this. This is the first tab in Section A - Voter Registration, corresponding to Section A of the EAVS Questionnaire.



There are several different ways to navigate through the template as you enter data.



On the last tab of the section, you can click "Continue" to take you back to the first screen in the Section and run your Error Check or you can click the "Next:" button to take you to the next section. In this case "Next: UOCAVA" will take you to Section B: Uniformed & Overseas Citizens Absentee Voting

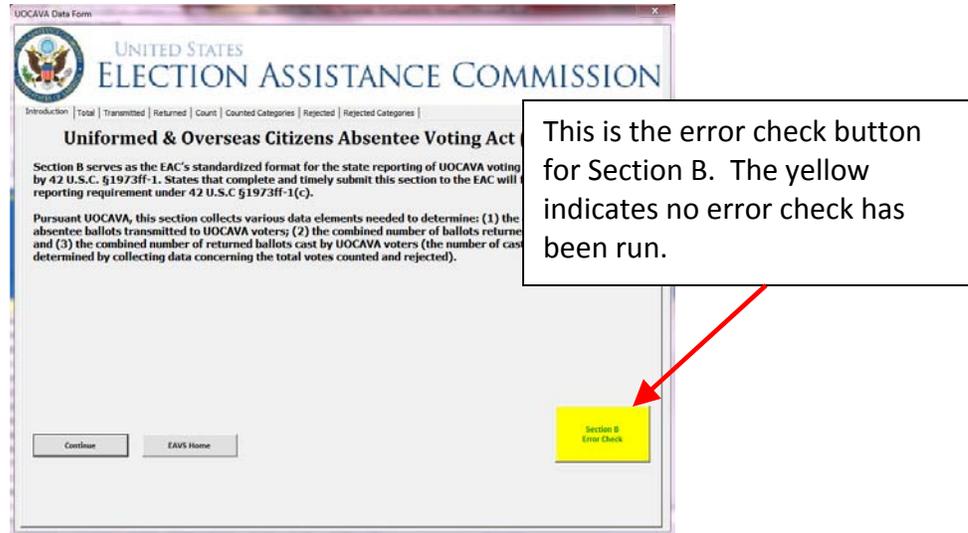


Act (UOCAVA). Clicking "EAVS Home" will take you back to the Home screen and you can select the section you would like to complete next.

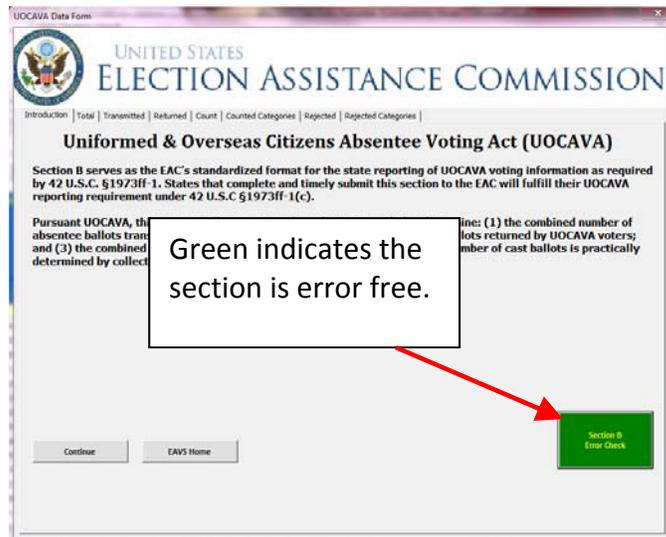
Error Checking in Form View

The Form View was designed with two types of error checking functionality to help you identify problems or errors in the data that you have entered. The first type is the **Section Error Check** that you can do for each jurisdiction after completing a section. This is a great way to check your data entry as you go, rather than waiting until you've entered all your questionnaire responses.

On the first tab of each Section, there is an error check button. If the error check for that section has not yet been run, the button will be yellow.

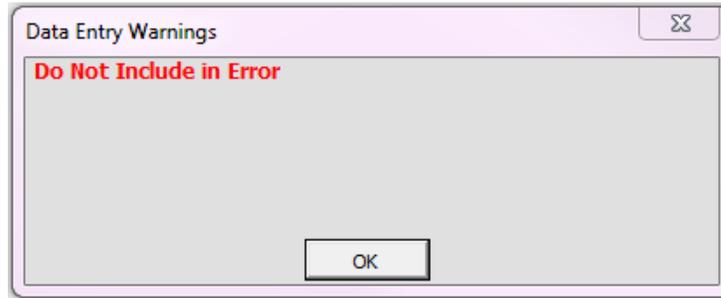


The "Error Check" button will turn green once the error check is run and no errors are found in the data.

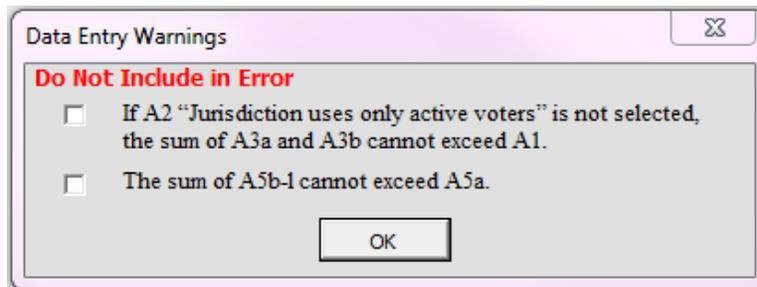


2014 EAVS Data Entry Template Instructions

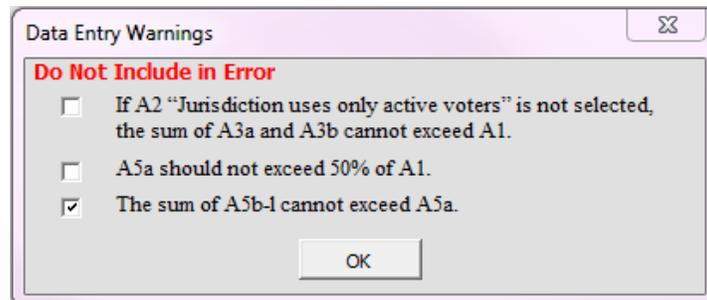
If the Error Check for a Section is run and no errors are found in the data, a blank “Data Entry Warnings” pop-up window will appear. Click “OK” to return to the form and continue entering your jurisdiction’s data.



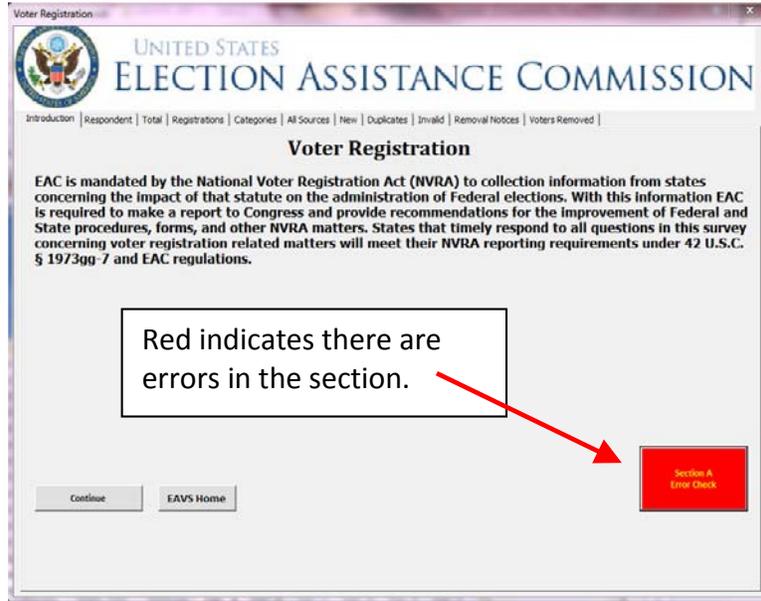
If the Error Check for a section is run and errors *are* found in the data, a pop-up window will appear that specifies which problems were found. Click “OK” to return to the form and correct the errors.



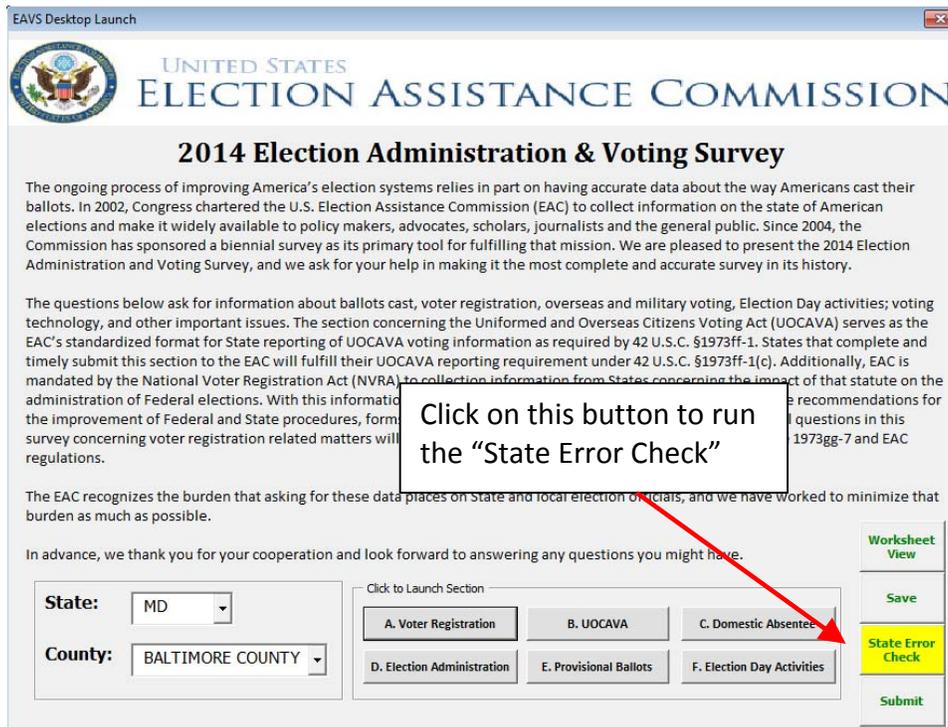
If a specific error does not apply to your jurisdiction, click the box under “Do Not Include in Error.” This will override the error; the next time an error check is run on the section this error will not be reviewed.



When the error check is run and errors are found, the button will appear red. It will remain red until all errors are either resolved or flagged with the “Do Not Include in Error” option.



The second type of error check is the **State Error Check**. The State Error Check will review every field for every jurisdiction in the state looking for errors. The State Error Check is run from the EAVS Home screen.



When you click on the “State Error Check” a Microsoft Word document will open that will contain the details of the error check. The report will provide a list of all the errors that were identified in the data and which jurisdictions’ data contain the error. For example:

If A2 “Jurisdiction uses only active voters” is not selected, the sum of A3a and A3b cannot exceed A1.

- BOX BUTTE COUNTY

A5a should not exceed 50% of A1.

- BOX BUTTE COUNTY

The sum of A5b-l cannot exceed A5a.

- BOX BUTTE COUNTY
-

The Worksheet View

If you want to enter data for more than one jurisdiction at a time, it will be easier to use the Worksheet View. In this view, you can navigate to a particular column and enter or paste data for multiple jurisdictions.

Switching to Worksheet View

When moving to Worksheet View, all data that have been entered in the form will be visible in the worksheet.

To switch from the Form View to the Worksheet View, go to “EAVS Home” and click on the “Worksheet View” button. You can also click on the “X” in the top right corner from any of the screens in Form View.

EAVS Desktop Launch

UNITED STATES
ELECTION ASSISTANCE COMMISSION

2014 Election Administration and Voting Survey

The ongoing process of improving America's election systems relies in part on the information provided by you. The information you provide will be used to improve the accuracy of the 2014 Election Administration and Voting Survey, and we ask for your help in making it the most complete and accurate survey in its history.

The questions below ask for information about ballots cast, voter registration, overseas and military voting, Election Day activities; voting technology, and other important issues. The section concerning the Uniformed and Overseas Citizens Voting Act (UOCAVA) serves as the EAC's standardized format for State reporting of UOCAVA voting information as required by 42 U.S.C. §1973ff-1. States that complete and timely submit this section to the EAC will fulfill their UOCAVA reporting requirement under 42 U.S.C. §1973ff-1(c). Additionally, EAC is mandated by the National Voter Registration Act (NVRA) to collection information from States concerning the impact of that statute on the administration of Federal elections. With this information, EAC is required to make a report to Congress and provide recommendations for the improvement of Federal and State procedures, forms, and regulations.

The EAC recognizes the burden that asking for these data places on State and local election officials, and we have worked to minimize that burden as much as possible.

In advance, we thank you for your cooperation and look forward to answering any questions you might have.

State: MD

County: BALTIMORE COUNTY

Click to Launch Section

A. Voter Registration	B. UOCAVA	C. Domestic Absentee
D. Election Administration	E. Provisional Ballots	F. Election Day Activities

Worksheet View

Save

State Error Check

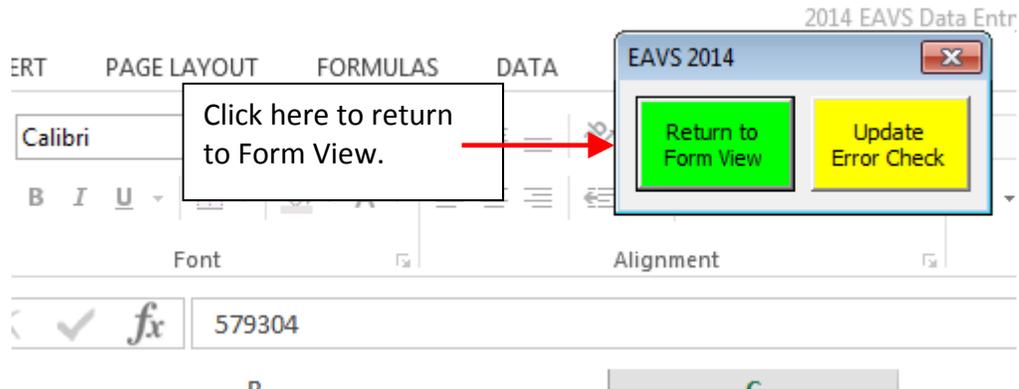
Submit

Click on this button to switch to "Worksheet View"

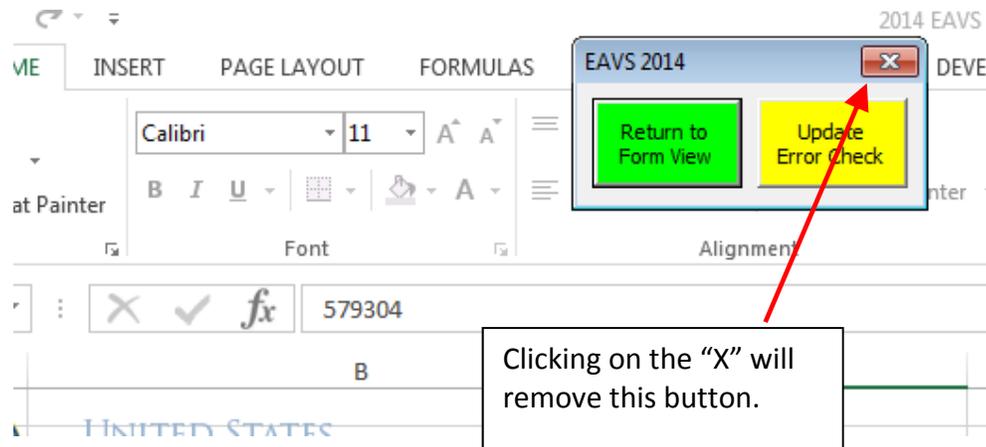
Click on this button to switch to "Worksheet View"

2014 EAVS Data Entry Template Instructions

Once in Worksheet View, click on “Return to Form View” to open up the Form View again. This box will remain at the top of the screen while working in Worksheet View so that you always have an easy way to switch to the Form View.



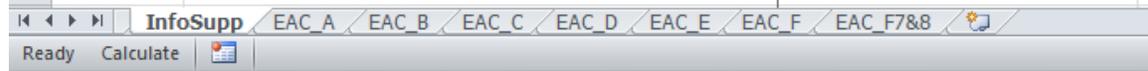
If you close the “Return to Form View” button, but need to return to the Form View, you will need to save your data, close the template and re-open the template in order to re-open the Form View.



Entering Data in Worksheet View

Each worksheet represents a different section. Data for the fields in Section A: Voter Registration are entered on the “EAC_A” worksheet. Similarly, the data fields for Section B: Uniformed & Overseas Citizens Absentee Voting Act (UOCAVA) are located on worksheet “EAC_B,” for example. Section F is split into two worksheets: the first worksheet contains items F1-F6, and the second worksheet contains items F7 and F8.

25	0603500000	LASSEN COUNTY	
26	0603700000	LOS ANGELES COUNTY	
27	0603900000	MADERA COUNTY	
28	0604100000	MARIN COUNTY	
29	0604300000	MARIPOSA COUNTY	
30	0604500000	MENDOCINO COUNTY	



The screenshot shows the Excel interface with the following elements:

- Worksheet Name:** InfoSupp
- Worksheet Tabs:** EAC_A, EAC_B, EAC_C, EAC_D, EAC_E, EAC_F, EAC_F7&8
- Formulas Bar:** Ready Calculate

When using the Worksheet View it is important to keep in mind the type or format of the information that you are entering in a particular field. Most fields are numeric fields, for example, where you enter the total number of registered voters or ballots. Other fields are text fields in which you can type in your comments. Entering data in a format other than what is meant to be entered in that field will prevent the Error Check from identifying errors in that field.

In addition, there are several fields that require a specific response. In most cases, these question columns are equipped with pre-defined lists from which you will need to either select a response from the drop-down menu using your mouse or type in one of the response options (e.g., “Yes” or “No”). The question subheaders will specify which responses are allowed for each column.

Lag Times for Certain Cells

You may experience some lag times as you enter data in certain cells in the worksheet, specifically for questions A1a, B1a, and C1a. After entering data in these cells, when you attempt to move to another cell in the worksheet, the program may freeze for a few seconds. Please note that this is normal; it is a side-effect of the error-checking features we have built into Worksheet View. For the vast majority of cells, you should experience little to no such lag, though the “EAC_A” worksheet may be a bit slower.

Locked Cells

The worksheet contains certain cells that will be locked; you will not be able to select or enter data in these cells. You will also not be able to paste data into these cells. All cells that don't require a response from you will be locked. The "Totals" columns are also locked, as they contain formulas to automatically calculate the answers to the questions based on your other answers.

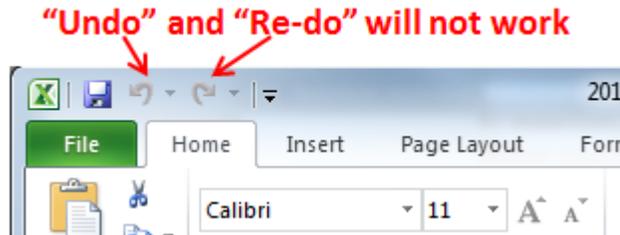
The image below gives an example of which cells are locked in the template. The grayed-out cells are locked, while the lighter cells are not. Note that you will need to scroll left/right and up/down to see the entire list of available jurisdictions and survey questions:

Local Jurisdiction Identification		* Information about the number of registered voters in your jurisdiction and how			
		Comments	How Registered Eligible Voters Are Reported	How Registered Eligible Voters Are Reported (Other)	Comments
	N/A = Data Not Available Not Applicable = Not Applicable	optional	See pull down for options	Other Specify: (Text)	optional
FIPS Code	Jurisdiction Name	A1Comments	A2	A2c_Other	A2_Comments
2922100000	WASHINGTON COUNTY				
2922300000	WAYNE COUNTY				
2922500000	WEBSTER COUNTY				
2922700000	WORTH COUNTY				
2922900000	WRIGHT COUNTY				

“Undo” and “Re-do” Features are not Available

Important! Please note that, unlike most Excel files you may have worked with, the “Undo” and “Re-do” features do not work in the Data Entry Template. As a result, if you make a mistake, such as accidentally overwriting data in a cell/column/row, you will not be able to automatically undo this mistake by clicking on the “undo” button. You will only be able to undo and re-do changes manually. The programming that is behind the built-in formulas and error-checking in Worksheet View makes the “undo” and “re-do” features unavailable.

Because of this, we highly recommend saving your file before overwriting any existing data, so that, should you make a mistake, you may close the file without saving it and return to the place at which you had last saved, prior to the mistake. Alternatively, you can save different versions of the template file, putting in a date or time or version number as part of the filename, so that you can go back to any previous version should you discover that you've entered a lot of data by mistake. For example, you could save the file as "EAVS-V01-2014-11-02.xls", EAVS-V02-2014-11-03.xls", and so on.



“Totals” Columns: Built-in Formulas to Automatically Calculate Sums

In both Worksheet and Form View, built-in formulas automatically calculate the sum of a range of cells, where needed. For example, B1Total represents the sum of items B1b, B1c, B1d, and B1e. In the Worksheet View, the gray “Total” columns have a subheading of “Formula,” and once data has been entered into the worksheet, they will appear with a dark gray background color.

UOCAVA Absentee Ballots Transmitted Uniformed Service Domestic or Foreign	UOCAVA Absentee Ballots Transmitted Non-Military Overseas	UOCAVA Absentee Ballots Transmitted Other Count1 Description	UOCAVA Absentee Ballots Transmitted Other Count1	UOCAVA Absentee Ballots Transmitted Other Count2 Description	UOCAVA Absentee Ballots Transmitted Other Count2	UOCAVA Absentee Ballots Transmitted Total Check
Enter Number or N/A	Enter Number or N/A	Other Specify: (Text)	Enter Number or N/A	Other Specify: (Text)	Enter Number or N/A	Formula
B1b	B1c	B1d Other	B1d	B1e Other	B1e	B1Total
125	100		20		5	250
						0
						0
						0

This is a sample “Total” column in Worksheet view (for B1Total).

In Form View, these same formulas are built into the “Total” cells. These cells can be identified by their green background.

This is a sample “Total” cell in Form View (for B1Total).

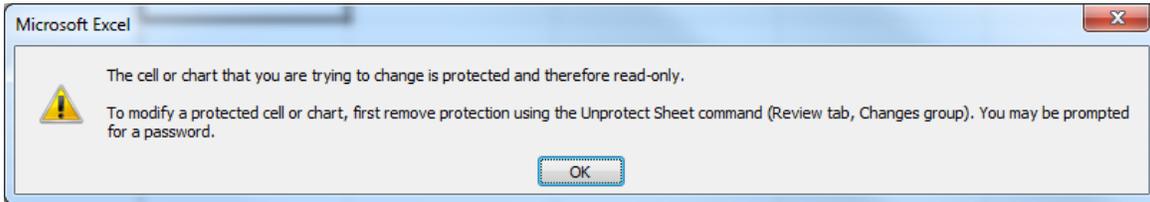
Copy/Paste in Worksheet View

You will be able to copy and paste data into the worksheet, just as you would with any other Excel file. However, there will be two differences:

1. Content that you paste into the worksheet will lose any of its prior formatting, such as cell color, cell background, or bolded/underlined/italicized font.

As a result, you will be able to copy data from a variety of outside sources (e.g., other Excel files, MS Word files) and paste it into the Data Entry Template without the formatting from those outside sources interfering with the structure of the Data Entry Template.

2. You will be unable to copy and paste entire rows of data into the Data Entry Template. Specifically, you will be unable to paste data into the grayed-out “Totals” columns in the worksheet, as the cells in these columns are locked to protect their built-in formulas. If you attempt to paste data into one of these locked cells, you will see the following error message:



You may click “OK” or “X” to get past this message. You will only be able to successfully paste in the data by selecting fewer columns to copy/paste. For example, you *can* paste data into the cells covering questions between A1a and A5I at once, but *not* between the cells covering A1a through A5Comments all at once, as the A5Total column is grayed-out and locked.

Registration Forms Received Since 2012: Other Count5	Registration Forms Received Since 2012: Total Check	Registration Comments
Enter Number or N/A	Formula	optional
A5I	A5Total	A5Comments



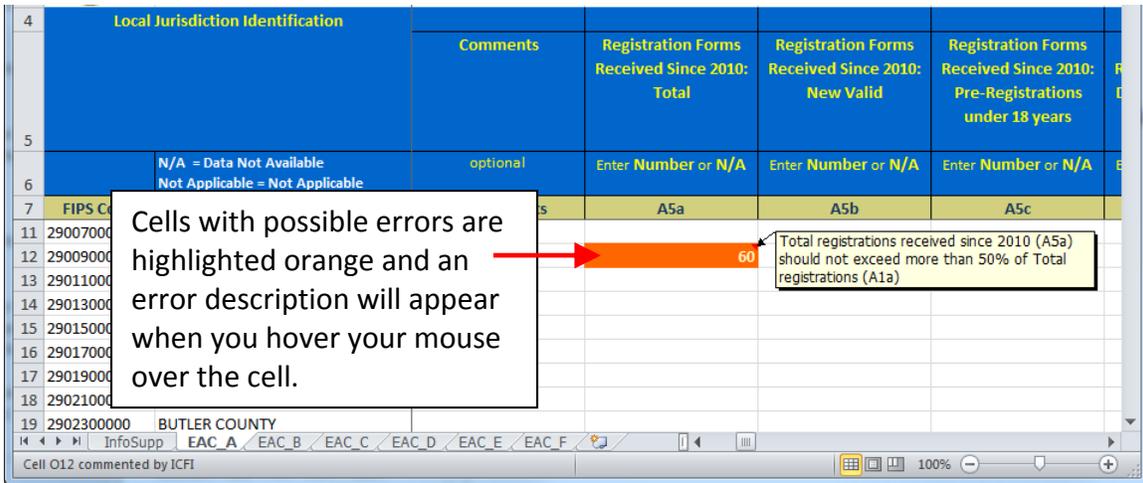
The cells in this column are locked

If you need to copy/paste large amounts into the worksheet at once, we recommend copying/pasting data from more than one jurisdiction (i.e., row) at

once. There is no limit to how many *rows* of data you can paste into the worksheet at once.

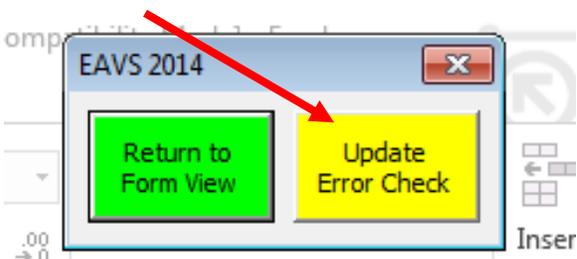
Error Checking in Worksheet View

The 2014 Data Entry Template, like in 2012, includes a Worksheet View Error Check mechanism. After a potential error has been entered, the relevant cell(s) will appear highlighted in orange, and a message describing the issue in question will appear if you hover your mouse over the highlighted cell. Once the error has been corrected, this flag will disappear. These error messages in Worksheet View will be identical to the error messages you will see in Form View.



“Update Error Check” Button

As you enter data, the workbook’s built-in formulas will *usually* update automatically to display possible errors. However, these formulas will *not* update automatically after switching between worksheets and after switching back-and-forth between Form View and Worksheet View. To refresh these formulas in Worksheet View, you will need to either save, close out, and re-open the file, or simply press the “Update Error Check” Button.



Please note that the process of updating the formulas may take several minutes, during which time Excel will be unavailable to use. Because of this, you may only want to press this button infrequently, such as when you are ready to review the data in a section, for example.

Submitting Your Data

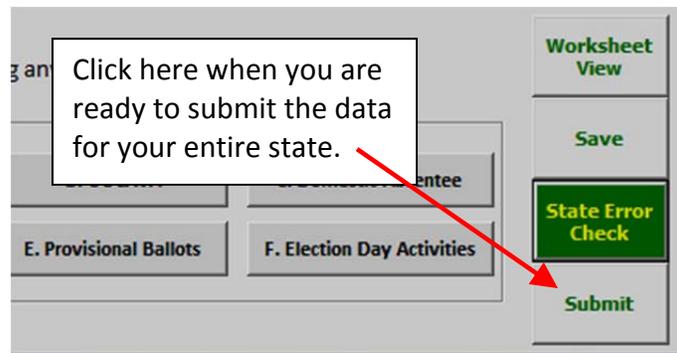
Once all the data have been entered, you can run the “State Error Check” to get a complete report of the problems, if any, in your data. After resolving the errors that are identified via the State Error Check, you are ready to submit your 2014 Election Administration and Voting Survey. Note that you are allowed to submit the template to ICF even if you have not resolved all the errors that the template identified.

You can submit your survey one of two ways:

1. You can save the template and attach it to an email to your Point-of-Contact at ICF International.

OR

2. Alternatively, you can click on the “Submit” button on the EAVS Home screen.



When you click on the “Submit” button, the application will ask you to save the template; the word “Final” will be included in the suggested file name. Once you save the data in the folder that you choose, the ICF project website will open up. Click on “Login” and enter your login information.



2014 EAVS Data Entry Template Instructions

After logging in, you can upload the file to this website and it will be sent directly to your Point of Contact at ICF International.



If you have any questions about the data you are entering or how to use the Data Entry Template, please call your point of contact at ICF International!

Appendix

This appendix is intended to provide users with the background technical knowledge necessary to complete the EAVS Data Entry Template. The guide covers the following topics:

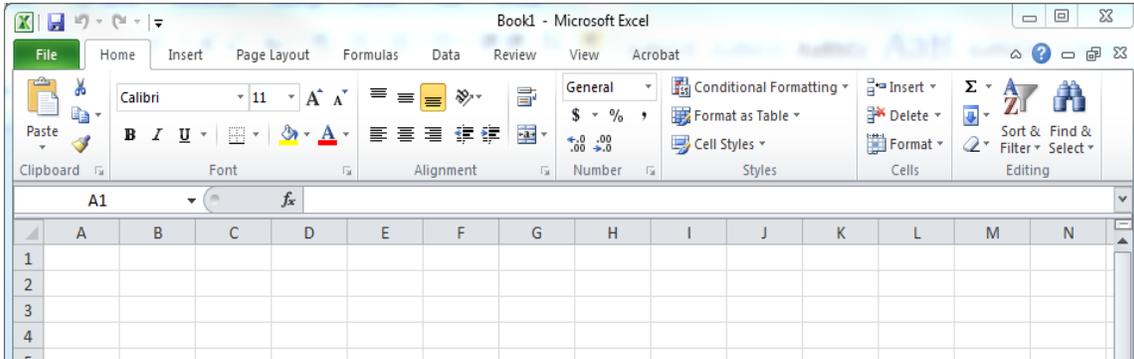
- How to identify which version of Excel you have
- How to save Excel files
- Components of an Excel workbook
- How to copy and paste data

Which Version of Microsoft Excel Do I Have?

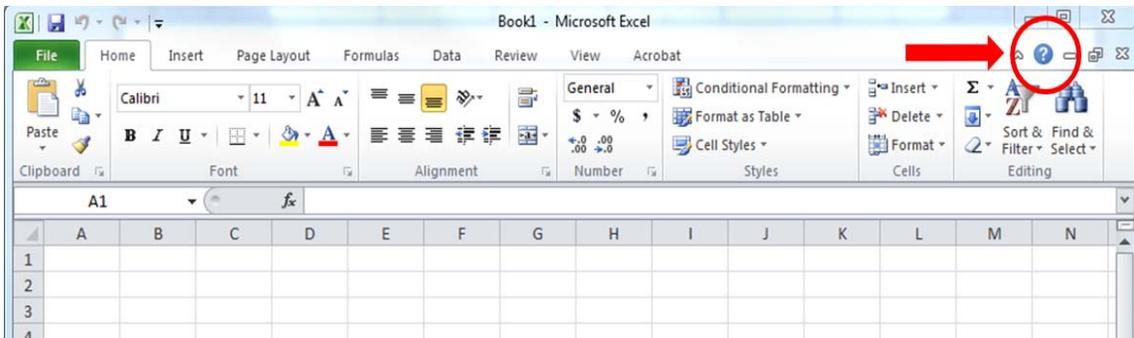
You may find it helpful to know which version of Excel you are working in, as some features of the program have changed over the years. The process for saving a file, for example, differs slightly between Excel 97-2003 and Excel 2007, 2010 and 2013, so you will want to know which version of Excel you have before working in the template. This will also help if you need to talk with your point-of-contact at ICF International about any issues regarding this template.

To determine, which version of Excel you have, first open either the 2014 EAVS Data Entry Template or a blank Excel workbook.

If you are using Excel 2007, 2010 or 2013, the Excel menu will look similar to the below image:

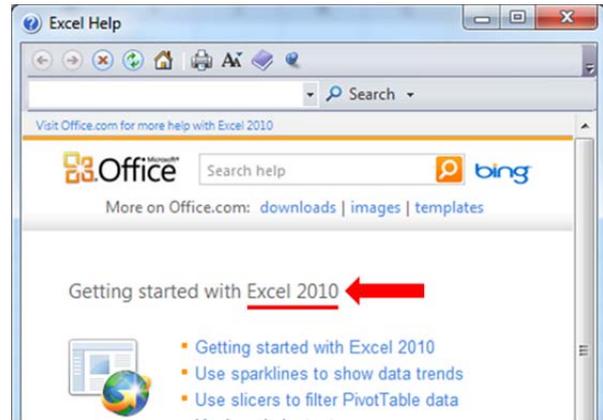


To distinguish between Excel 2007 and Excel 2010, click on the (blue in 2007 and 2010) “?” icon in the upper-right corner (see image below).

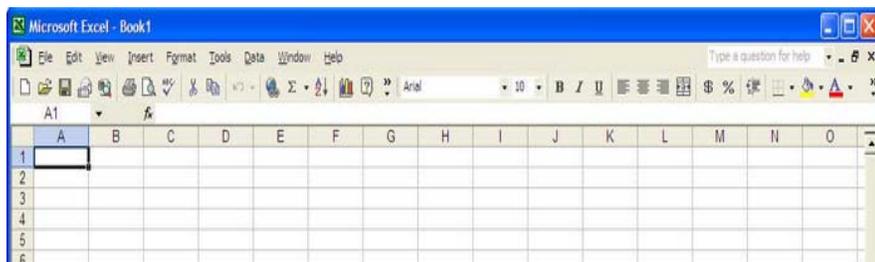


2014 EAVS Data Entry Template Instructions

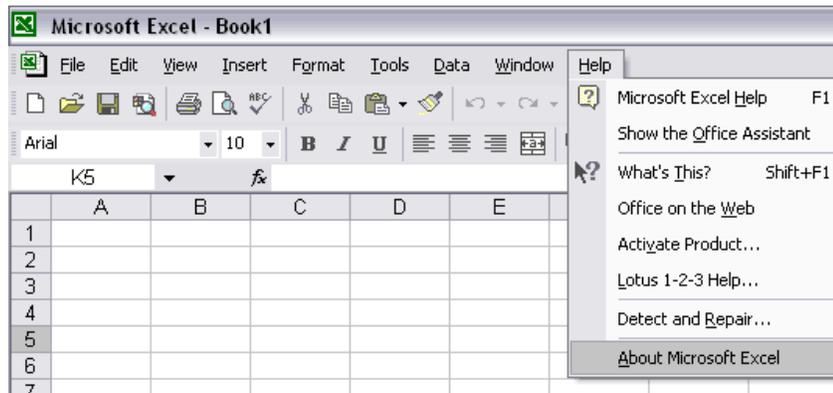
A box will pop up that will indicate the version of Excel you are working in (see image to right).



If you are using a prior version of Excel (Excel 97-2003), the Excel menu will look like the image to the right.



To determine the exact version of Excel, go to the "Help" menu and click on "About Microsoft Excel" (see image to right).



A box will appear displaying information about the Excel version you are using (see image to right).

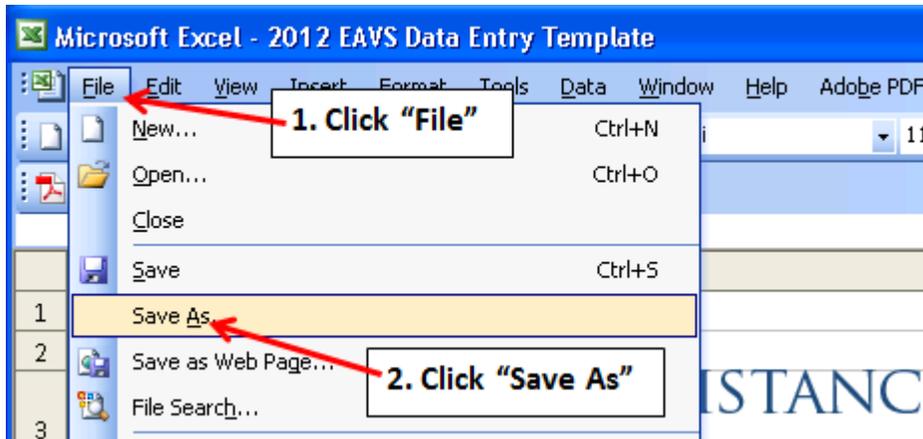


Saving a File in Excel

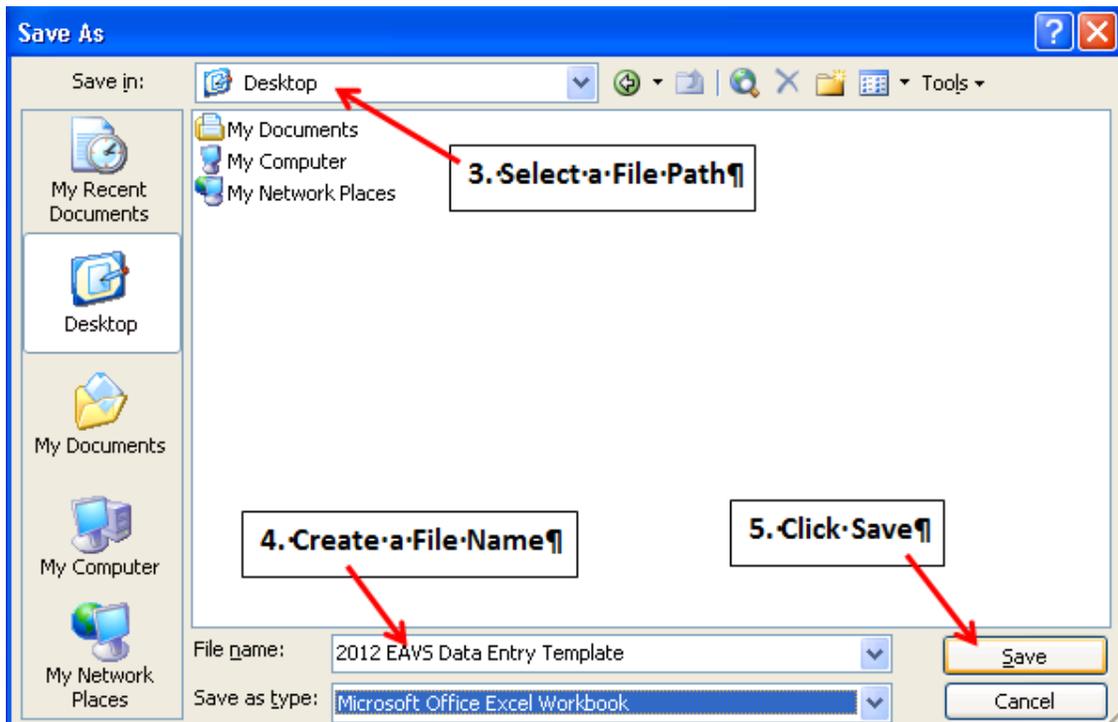
Once you begin working in the data entry template, you will need to save your work. The first time you save you will need to specify a file name and file path by using “Save As”; however, any time after that you can save the file by simply selecting “Save”.

Saving in Excel 97-2003

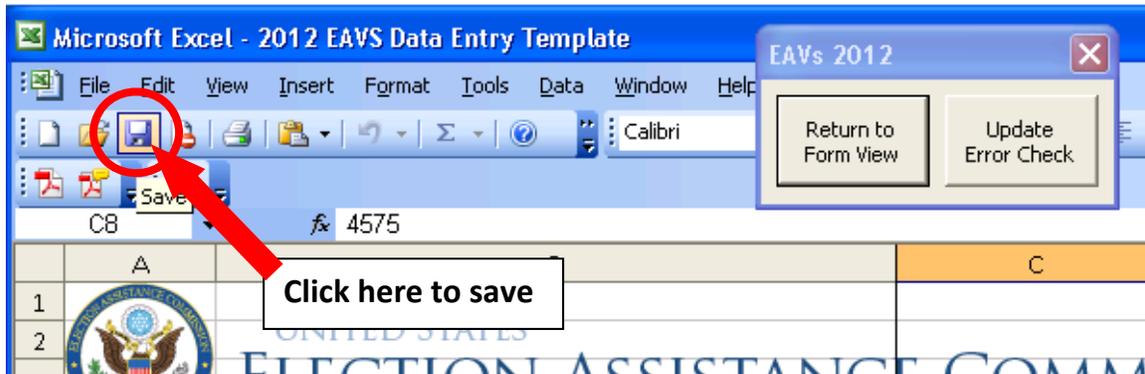
If you are using any version of Excel between Excel 97 and Excel 2003, to save the file (also known as an Excel “workbook”) for the first time, click on “File” and select “Save As.”



You will then need to specify a file path (i.e., the location on your computer) to save to. You also need to create a name for the file. Click “Save” or hit “Enter” on your keyboard when done.



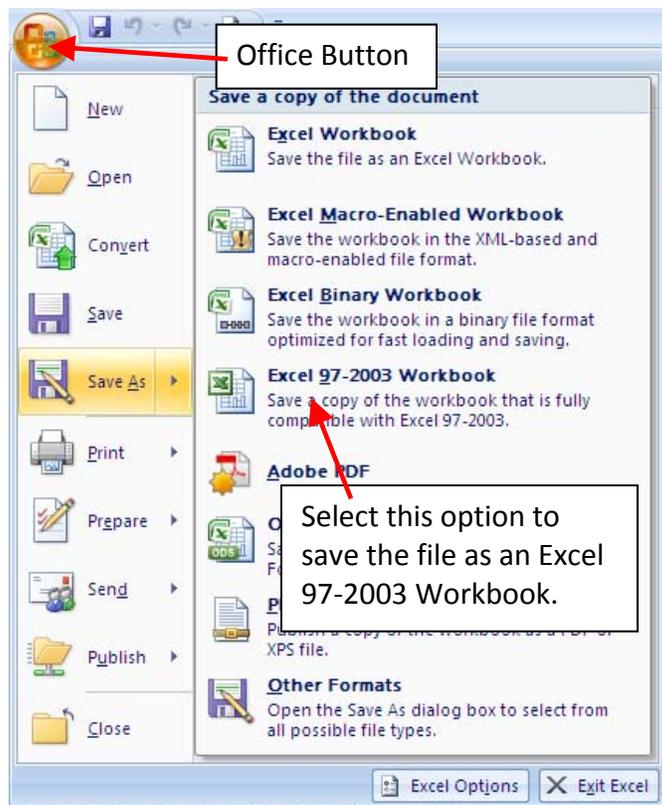
Once you have saved the file using the “Save As” option, you will subsequently only need to use the “save” function to save your work. You can save your work by selecting the “Save” icon in the Excel menu bar or by pushing the “Ctrl” and “S” buttons on your keyboard at the same time. If you want to save different versions of the file, then use the "Save As..." command to save under different filenames.



Saving in Excel 2007 and 2010

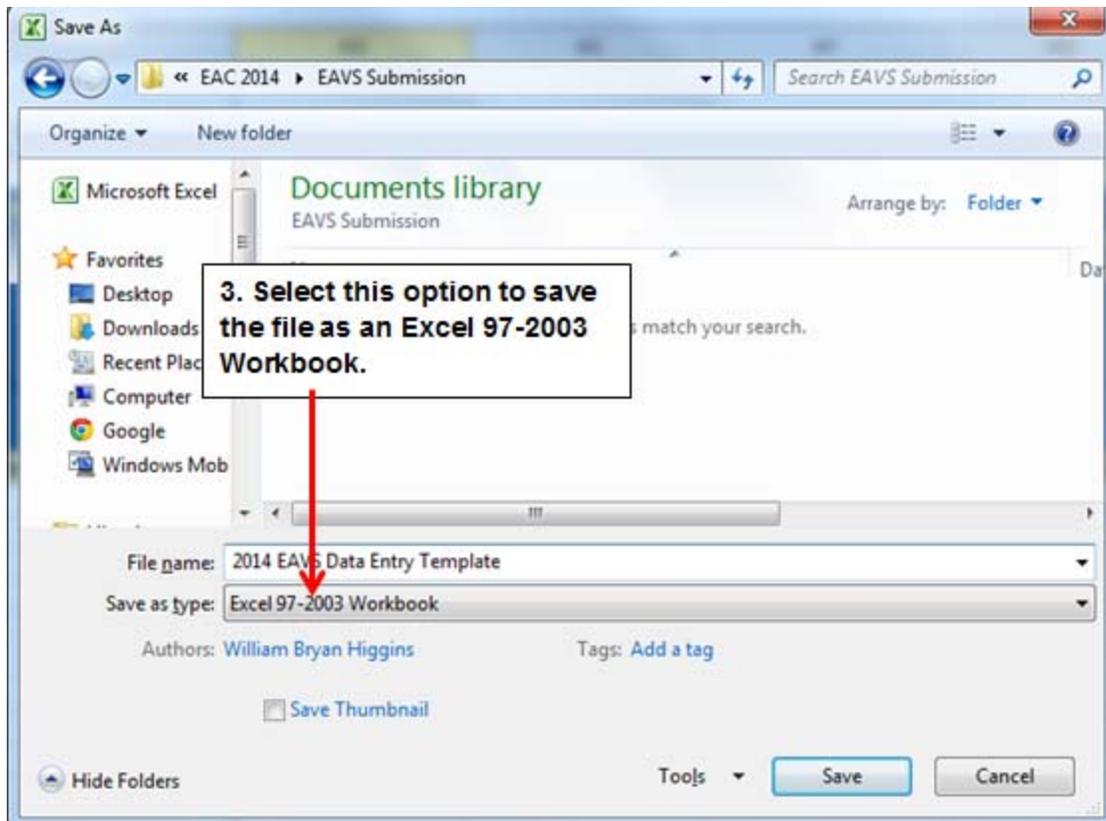
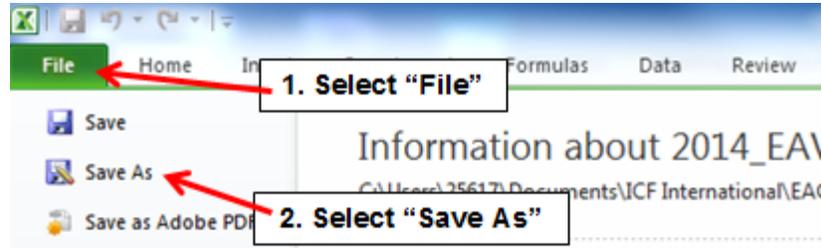
Saving a workbook in Excel 2007 and 2010 involves the same process as saving in Excel 97-2003. However, one extra step is involved – you need to specify the correct file extension to ensure that certain features of the data entry template aren’t lost. You will need to save it as an Excel 97-2003 Workbook (.xls).

Excel 2007: In order to “Save As,” click on the “Office Button” in the top-left corner. Move your mouse down to the “Save As” button, then click “Excel 97-2003 Workbook” from among the options directly to the right. You will then need to create a name for the workbook, and select the file path you will save to.



2014 EAVS Data Entry Template Instructions

Excel 2010 or 2013: In order to “Save As,” click on “File” from the menu bar in the top-left corner, and select “Save As” from the options on the left. The “Save as type” drop-down menu allows you to specify the file extension you will save the workbook as. Select “Excel 97-2003 Workbook;” this should be the default option. To finish saving, create a file name for the workbook and select the file path you will save to.



Just as in Excel 97-2003, in Excel 2007 and 2010, once you have saved the file using the “Save As” option, you will subsequently only need to use the “Save” function to save your work. You can save your work by selecting the “Save” icon in the Excel menu bar or by pushing the “Ctrl” and “S” buttons on your keyboard at the same time.

Components of an Excel Workbook

Before you begin working in the data entry template, it's useful to understand the basic layout of Microsoft Excel and some terms that are common to the program.

Workbook: An Excel workbook is the entire file that you work with; in this case, the data entry template, including all worksheets.

Worksheet: Worksheets are the specific tabbed sections contained in the workbook. A blank workbook contains three worksheets by default (e.g., Sheet1, Sheet2, Sheet3). The 2014 EAVS Data Entry Template actually has eight worksheets, each corresponding to a different section of the paper survey: InfoSupp, EAC_A, EAC_B, EAC_C, EAC_D, EAC_E, EAC_F and EAC_F7&8.

Excel's menus and toolbars – which cover approximately the top quarter of the screen – differ slightly between Excel 2003, 2007, 2010, and 2013. These features can be used to format and adjust the appearance of the worksheets, sort data, insert formulas, and perform other advanced operations. You will not need to know how to use these features. Aside from knowing how to save the file (covered above) and perform basic commands such as “copy” and “paste” (which will be covered below), you won't need to interact much with the menu features.

However, you will be required to enter data (i.e., numbers, and in some cases, text) into the worksheets.

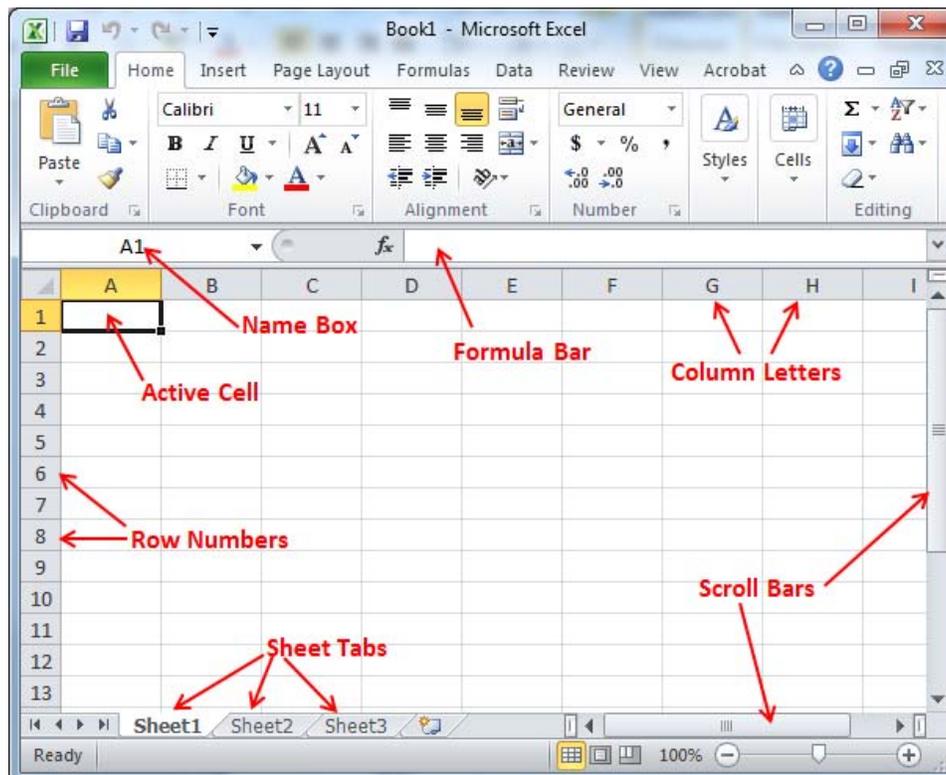
The next page explains the main components in Excel that you will need to know to perform this task.

Active Cell: This is the "current cell" or the cell that is in focus. A black outline surrounds this cell. Whenever you type something on the keyboard, it will be entered into the active cell. You can change which cell is active by clicking with the mouse or using the arrow keys on the keyboard.

Formula Bar: You can also enter data into the active cell by typing in the formula bar.

Columns and Rows: Columns run vertically and are designated by letters; rows run horizontally and are designated by numbers. The intersection of column letters and row numbers creates a cell reference (e.g., A1).

Name Box: The name box displays the cell reference (e.g., A1) of the active cell.



Sheet tabs: The sheet tabs are located in the bottom left corner, and allow the user to navigate between different worksheets. If the workbook contains a large number of worksheets, not all sheet tabs will be displayed at once. You can see the whole range of sheet tabs by clicking on the tab scrolling arrows to the left of the sheet tabs.

Scroll bars: The worksheets in the 2014 EAVS Data Entry Template are very large. You will not be able to view the entire worksheet without scrolling horizontally and often vertically, depending on the number of jurisdictions in your State. You can scroll up and down by clicking and dragging the vertical scroll bar on the far right corner of your screen. Likewise, click and drag the horizontal scroll bar – located in the bottom-right corner – to scroll left and right. You can also make different cells active by using the arrow keys. The worksheet will scroll appropriately to always keep the current active cell in view.

How to Copy and Paste Data

You may find it helpful to copy the contents from one cell to another in Excel. You might even wish to copy cell contents from another Excel workbook into the data entry template.

Copy: To do this, you first need to select the cell or the specific contents of a cell(s) that you wish to copy. Then, to copy, hold down the “Ctrl” and “C” keys on your keyboard at the same time. You can also right click on the selected area and then click “Copy” to do this.

Paste: After copying the cell(s), select the area in the Data Entry Template where you’d like to have the contents pasted. Then paste the contents into this area by holding down the “Ctrl” and “V” keys on your keyboard at the same time. Note that you will only be able to copy multiple cells’ worth of data into Worksheet view and not Form view.

Note that if you copied the contents of more than one cell, when pasted, these contents will occupy more than one cell as well. For example, if you copy a 3x2 matrix of cells, they will occupy a 3x2 matrix of cells when you paste them in another location.

Copy and paste contents from another Excel workbook: You may find it necessary to paste data from an outside source – such as another Excel workbook or even an MS Word document – into the Data Entry Template.

You will need to have both files open at the same time to accomplish this. To do this, first have the Data Entry Template open. Then open the other Excel file by either: 1) opening the other file from the folder (e.g., Desktop) to which it’s saved or 2) open a blank Excel workbook by holding “Ctrl” and “N” at the same time, then clicking “File” (or the Start ribbon, if you’re using Excel 2007), then clicking “Open,” and opening the file by navigating to the correct folder in the box that pops up.

Once both files are open at once, you can copy/paste data just as you would otherwise. Select the cell(s) you wish to copy, and hold down “Ctrl” and “C” to copy. Minimize the window by clicking on the “minimize” button in the top-right corner of the screen. This will allow the other Excel file to be displayed. Then select the area in the Data Entry Template where you would like these contents pasted, and hold down “Ctrl” and “V” to paste.

