

# Michigan - Bureau of Elections

---



## Procedure for MERTS Users to Archive Reports

Updated Release Date -5/24/2007

MertsFileArchivingProcess20070524\_WO19032007

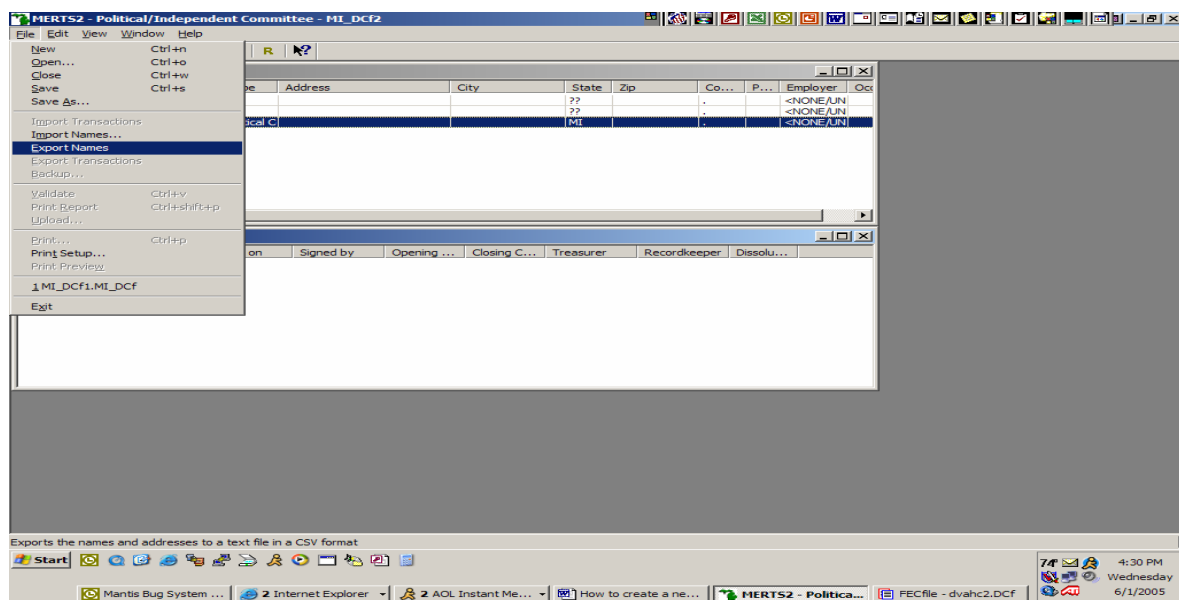
All reports are created within a data file. If a committee data file becomes too large, it can result in an extended loading time – a delay in opening the file. This can be minimized by periodically archiving the old MERTS data file based on current election cycle date (Candidate module) or calendar year to date (PAC module). A new data file should only be created at the beginning of the year (PAC module) or at the beginning of the current election cycle (Candidate module) to avoid having to recreate reports.

This MERTS Procedure provides step-by-step instructions on how to archive reports by creating a new committee data file while retaining the database of names. This procedure can be done by any **MERTS** user.

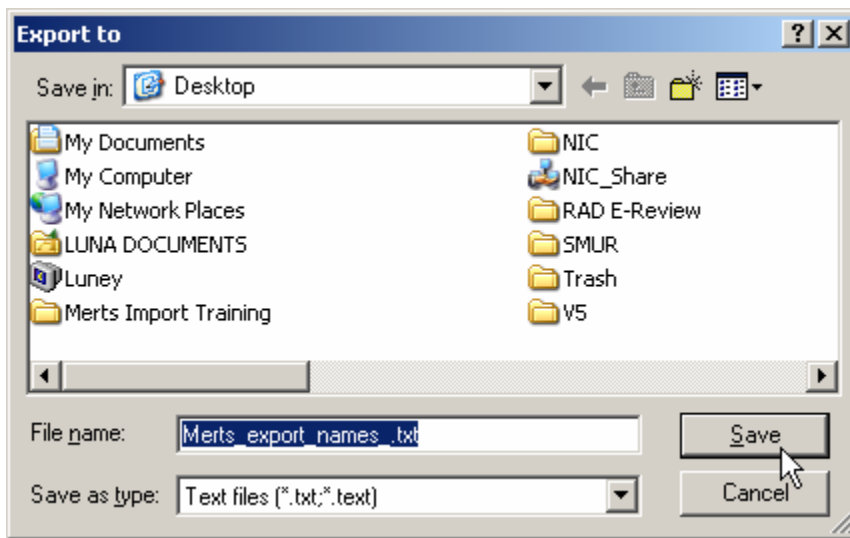
## **A. Exporting names from the old committee data file into a new committee data file:**

Prior to exporting any names, create a back up copy of the file to guard against any possible problems.

1. With current data opened in MERTS select the 'File' → 'Export Names' option on the menu bar.



2. An “Export to” window will appear. In the ‘Save in’ field, select the destination folder for the export file. Preferably the ‘Desktop’

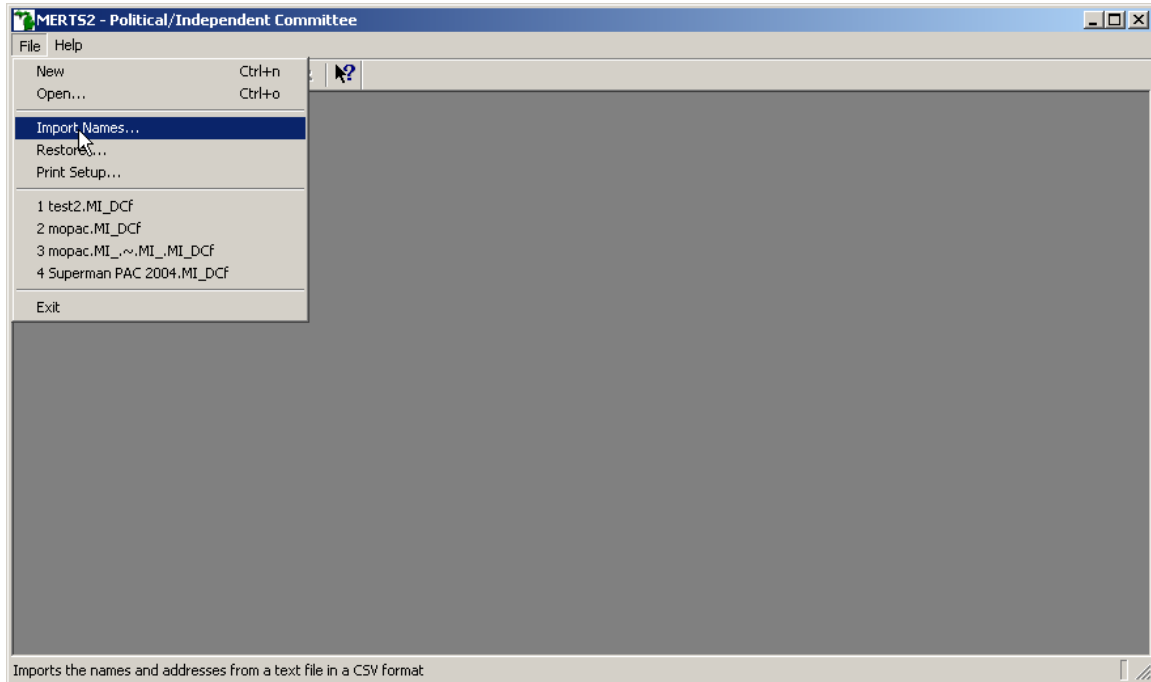


3. In the ‘File name:’ field, type the desired file name (e.g., Merts\_export\_names.txt). The only acceptable format is a text file (.txt).
4. Left Click on the ‘Save’ button. A complete list of your Names has now been exported to the specified filename in a comma delimited text format.

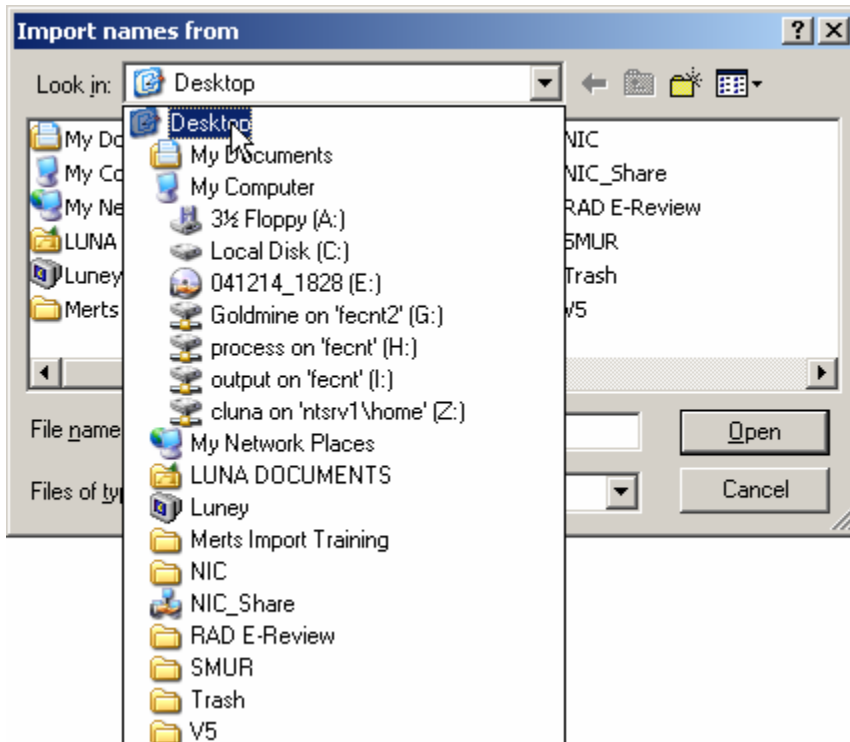
## B. Importing names from the old committee data file into a new committee data file:

In order to retain the Individual/Employer linked relation, the Import process must be started prior to creating the new committee data file. A new data file will be created during the import process.

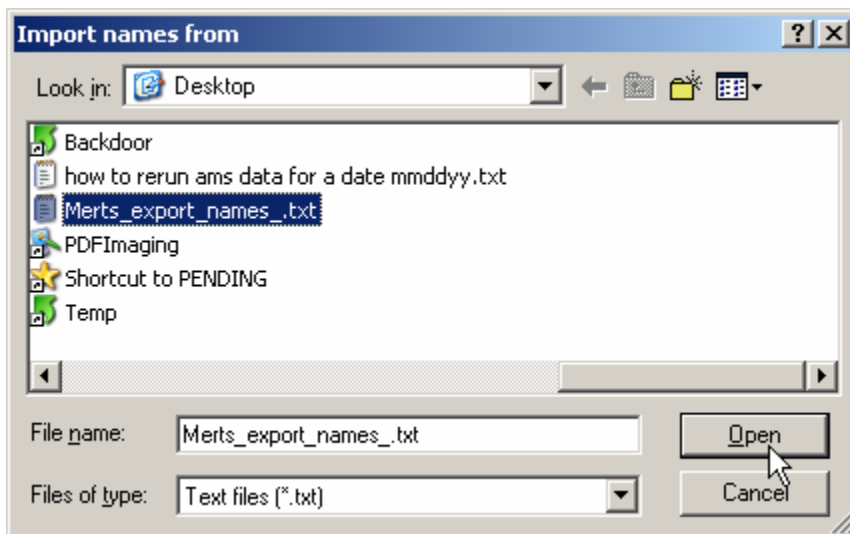
1. With MERTS application opened, select the 'File' → 'Import Names' option on the menu bar.



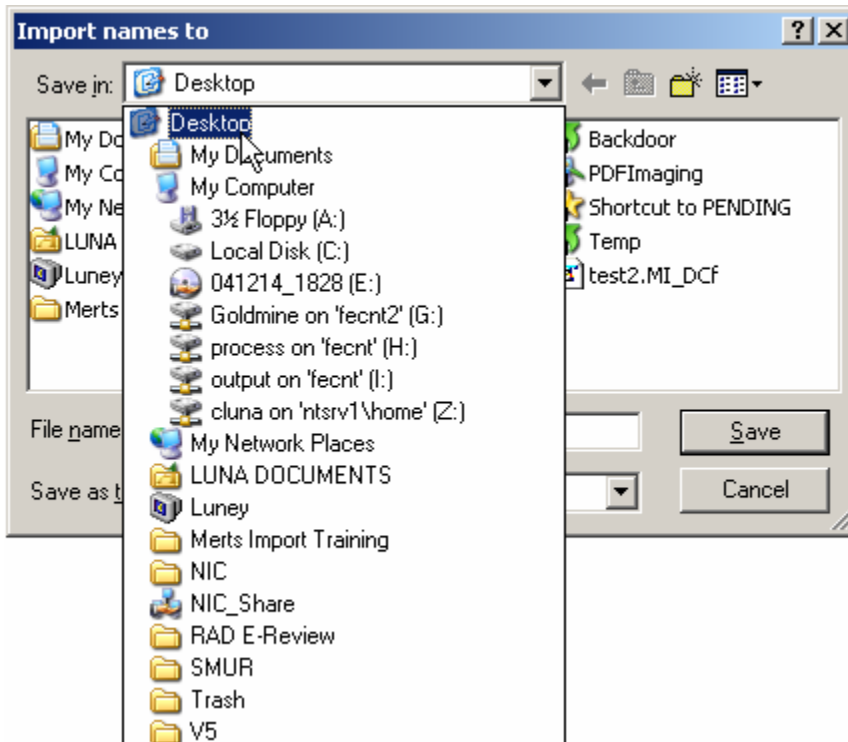
- An “Import names from” window will appear. In the “Look in:” field, select the location of file to be imported.



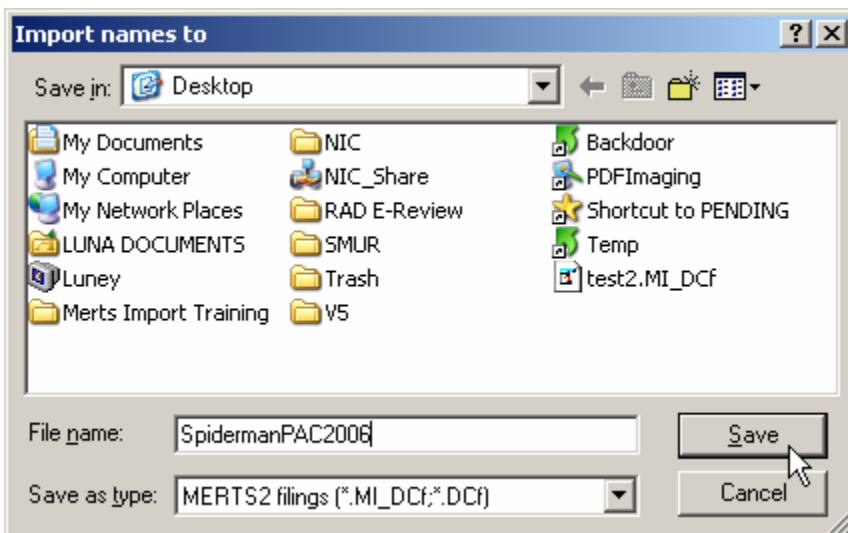
- Select the file to be imported and Left Click on the ‘Open’ button.



- An 'Import names to' screen will appear. This step will create the new committee data file. In the 'Save in:' field, select the desired location for the new data file.



- Type the new committee data file name in the 'File name:' field and Left Click on the 'Save' button (hint: easier to maintain if label by year).



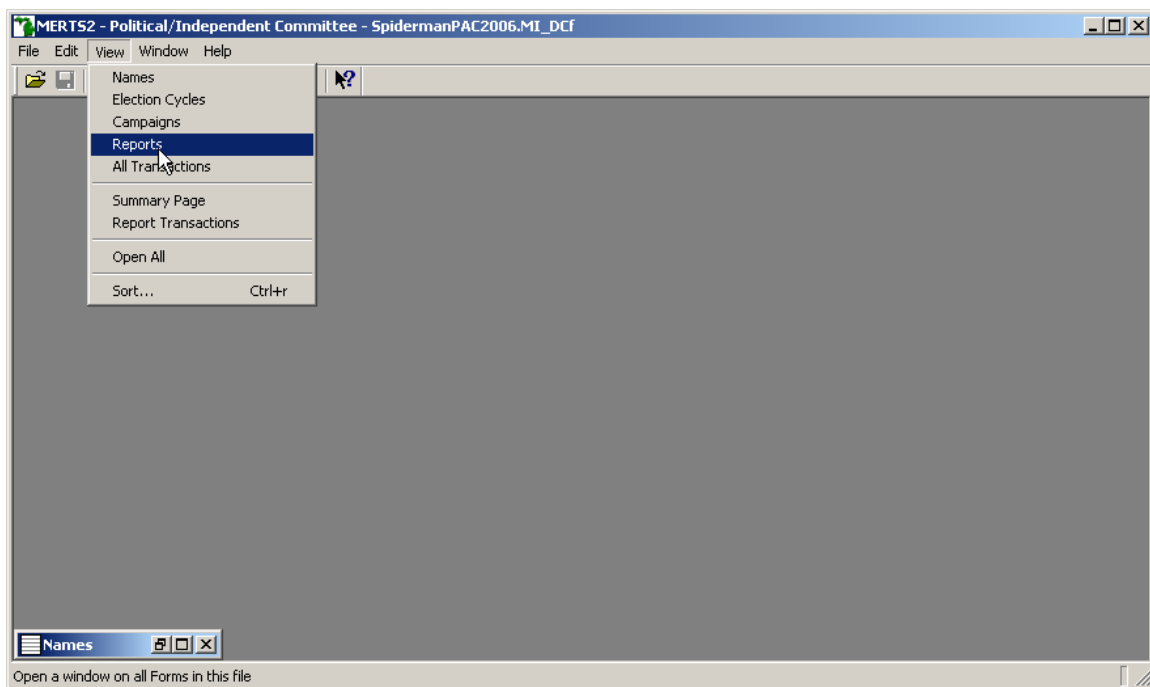
6. For PAC module, a 'Please choose the Filer type' window will appear. Select the appropriate type and Left Click the 'OK' Button.



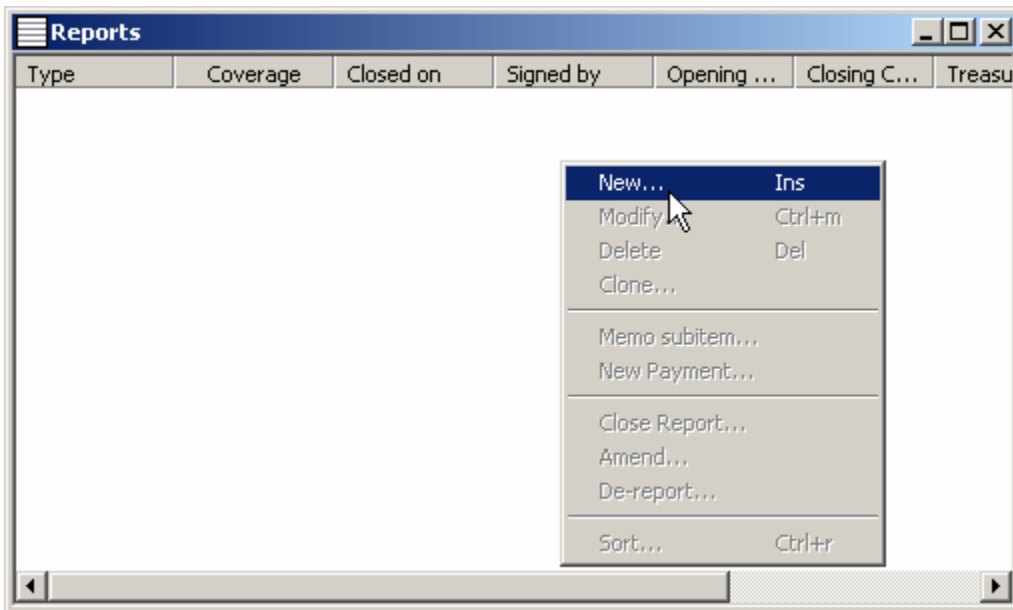
7. The names have now been imported into the newly created committee data file.

### C. Creating MERTS reports:

1. Select 'View' → 'Reports' from the menu bar



- With the 'Report' window active, Right Click anywhere within the window. A set of options will appear. Left Click on the option 'New'. This will open the 'Report information – PAC' or 'Report information – Candidate' window based on the module in use.



- Fill in the dates and select the type of report.

(Other Committee Types)

The 'Report information' dialog box contains the following fields and controls:

- Date From: [ ]
- Date Thru: [ ]
- Election date: [ ]
- Type of Report: Undefined (dropdown)
- Candidate: <NONE/UNKNOWN> (text field)
- ... (list box)
- <non-itemized> - ... (list box)
- <NONE/UNKNOWN> - ... (list box)
- Election cycle running in: - 0 (dropdown)
- Office sought: To Be Determined (dropdown)
- District#/Community served: [ ]
- Dissolution date: [ ]
- Buttons: OK, Cancel

(PAC Committee View)

The 'Report information - PAC' dialog box contains the following fields and controls:

- Date From: 1/1/06
- Date Thru: 4/30/06
- Dissolution date: [ ]
- Type of Report: January Triannual (dropdown)
- Buttons: OK, Cancel

4. Left Click on the 'OK' button. This will populate the first report of the year in the 'View' → 'Report' window.

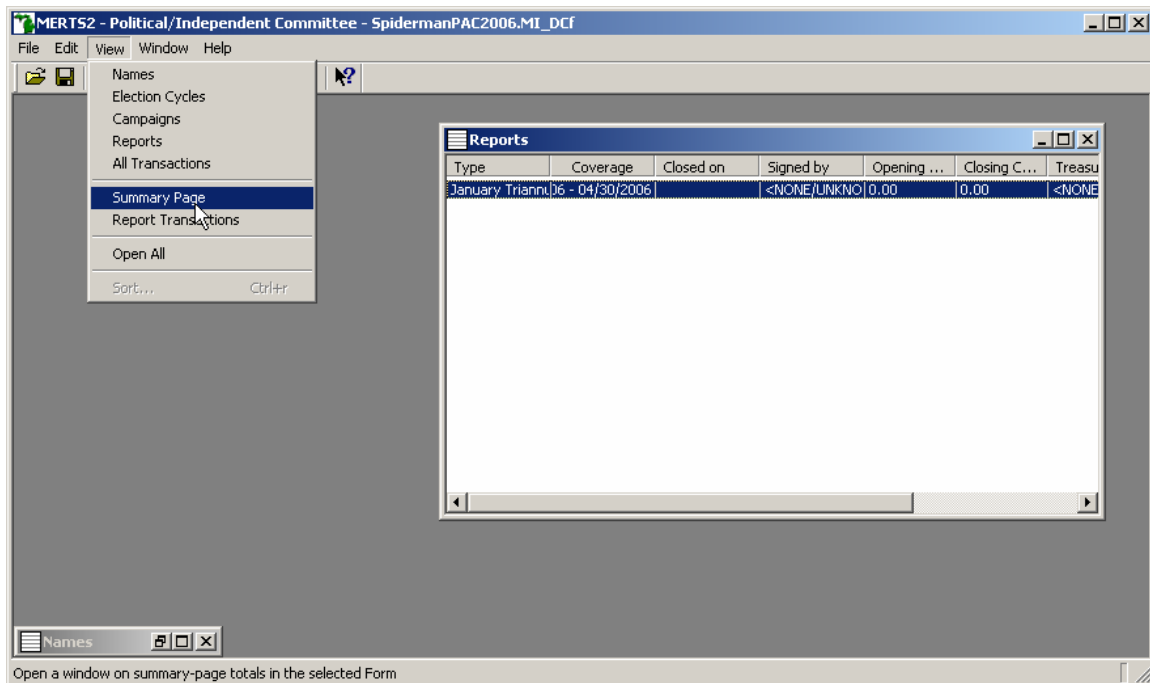
(PAC Module View)

Type	Coverage	Closed on	Signed by	Opening ...	Closing C...	Treasu
January Triannu06 - 04/30/2006			<NONE/UNKNO	0.00	0.00	<NONE

(Candidate Module View)

Candidate	Running for	Type	Coverage	Election Date	Closed on	Signet
Man, Super	To Be Determined	Pre-Election Primary	07/18/2006 - 07/28/2006			<NOM

5. After creating the first report of the year, the beginning cash on hand needs to be adjusted.
6. With the 'Report' window active and the first report highlighted, select 'View' → 'Summary Page' from the menu bar.



7. In order to adjust the beginning cash on hand, a contribution must be created using a date prior to the current report and current calendar year (PAC Module) or current election cycle (Candidate Module). This will ensure the contribution does not get totaled into the current activity.
8. Double Left Click on line number '3. Contributions'. This will activate the 'Transactions information' window.

Summary Page - Independent/Political Committee			
Line#	Description	This Period	Cumula
3.	Contributions		
	....a.Itemized (Schedule 2A : Column 6)		
	....b.Unitemized (less than \$20.01 each - no Schedule)		
4.	Other Receipts (Schedule 2A-1: Column 6)		
6.	In-Kind Contributions		
	....a.Itemized (Schedule 2-IK: Column 7)		
	....b.Unitemized (less than \$20.01 each - no Schedule)		
8.	Expenditures		
	....a.Itemized Direct (Schedule 2B - Column 7)		
	....b.Itemized Get-Out-the-Vote (Schedule B-G)		
	....c.In-Kind Expenditures - Purchase of Goods or Services (Schedule 2B-2 - Column 7)		
	....d.Unitemized (less than \$50.01 each - no Schedule)		
9.	Independent Expenditures (Schedule 2B-1 - Column 7)		

9. In the 'Name' field, select '<non-itemized>' as the contributors name.
10. Enter the date prior to the current report and current calendar year.
11. In the 'Amount' field, enter the opening cash amount for the current year.
12. In the 'Description' field, type the following "Opening Cash Balance".
13. Left Click on the 'OK' button and the current report should reflect the new opening balance.

**Transaction information - Contribution** [X]

Name  PAC names only

Date	Amount
<input type="text" value="12/31/04"/>	<input type="text" value="2000.00"/>

Description

Fund-raising event

Type

Vendor

Campaign

NOTE: When amending reports that include a monetary change which affect the balance, all subsequent reports should be amended as well. If multiple data files exist, the files containing subsequent reports to the amendment should be amended also and the 'Opening Cash Balance' transaction adjusted accordingly.