

How to Restrict a Database User's View of a *Voter/Donor Record* by Filtering their Login Access using the 'Limit view of Voter' Setting

Author: Kristenson, Joel
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Overview

This article was created due to an email question we received from a customer who was **concerned with *new* user having more access than they should** (*which may allow for mistakes to be made when performing data entry*). This article specifically walks through **limiting their 'view'** of a donor/voter/contact record card. Here's a snippet from the email thread we received:

Customer: is there a "user" view where they can only update the data through some kind of preset form? I'm leery of direct db access for folks who may not have a lot of query experience.


Support Tech: Since you reference new users and query experience, I'm going to take a guess that you would like certain people to have access to only certain records and have a simple view?

Customer: Exactly!

Support Tech: Once you activate the limited view flag (see image) when a voter record is opened, there are specific tabs removed from view.

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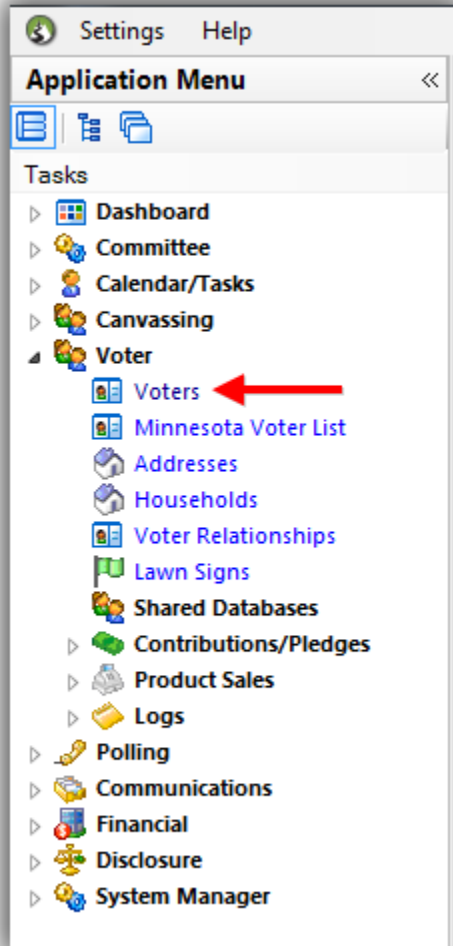
Note: You can [filter a user's access](#) even further by a lot of other criteria i.e. by location, a saved search query, or specific attributes.

 **Tip:** Learn the basics of [creating new database users](#), and setting their specific security levels. *For new users, they can get trained-in by attending out free [introduction training class](#) which covers all the basics of using **Trail Blazer**.*

Steps

Navigate to the **Voters (Donors/Contacts)** list under the **Application Menu**.

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Pull up a list of **current database users** by following **Admin > Logon > Check 'Allow Windows-based access' > Click [Search]**. *In my example I had 2 users with access.*

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Pull up a list of your database users.

The screenshot shows the TrailBlazer interface with the following elements highlighted:

- 1:** The 'Admin' button in the top navigation bar.
- 2:** The 'Logon' button in the 'Control' section.
- 3:** The checkboxes for 'Allow Windows-based access', 'Allow Web-based Profile Access', 'Allow Polling access', and 'Allow Membership access'.
- 4:** The 'Search' button in the top left corner.

Below the settings, a table displays a list of voters:

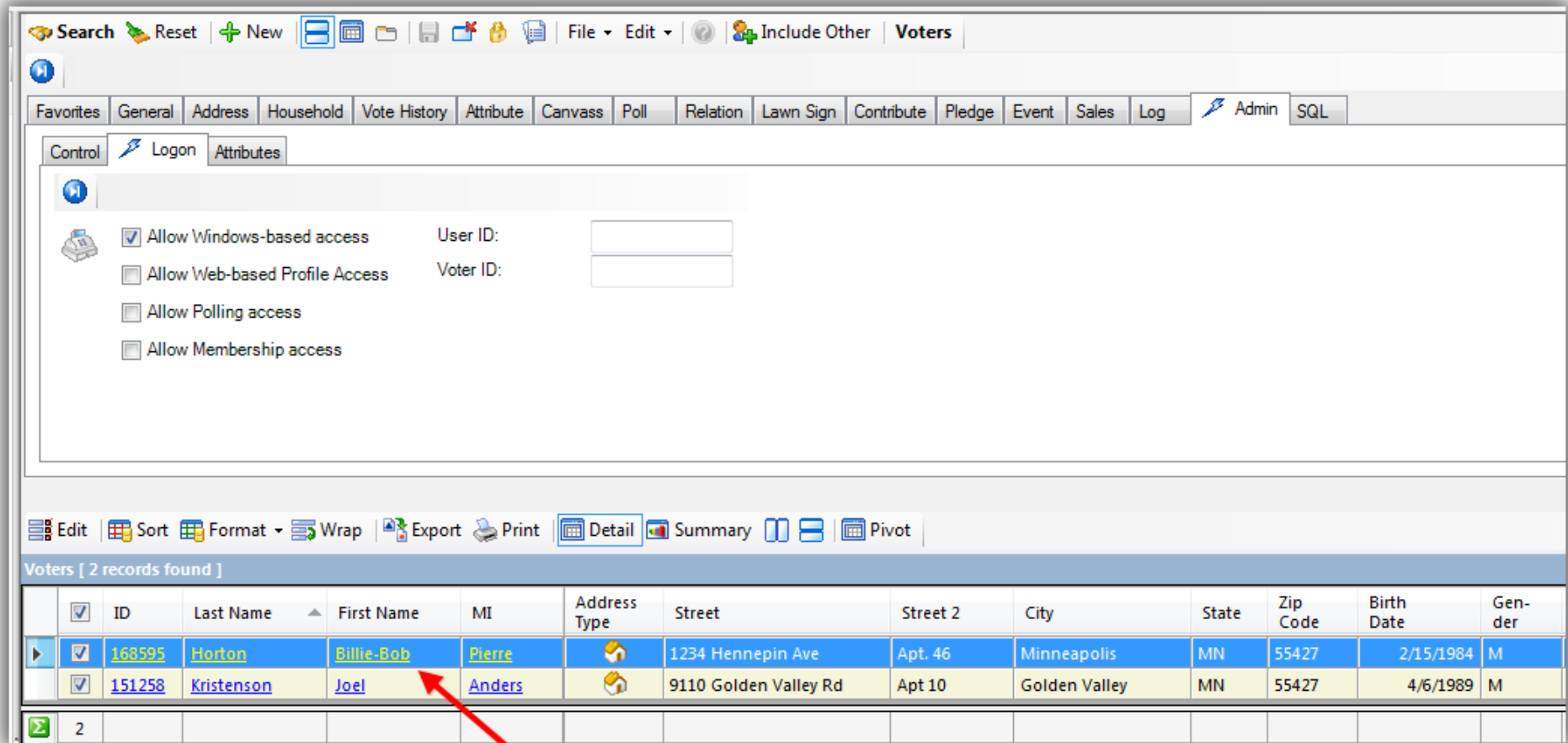
ID	Last Name	First Name	MI	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
168595	Horton	Billie-Bob	Pierre		1234 Hennepin Ave	Apt. 46	Minneapolis	MN	55427	2/15/1984	M					
151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	4/6/1989	M	Hennepin	05	46	46A	

The table header indicates 'Voters [2 records found]'.

Count of current db users.

Open the user's record card that you want to filter their view for. *In this example I clicked on 'Billie-Bob Horton'.*

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The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar, there are tabs for various data views: Favorites, General, Address, Household, Vote History, Attribute, Canvass, Poll, Relation, Lawn Sign, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. The 'Admin' tab is currently selected. Under the 'Admin' tab, there are sub-tabs for Control, Logon, and Attributes. The 'Attributes' sub-tab is active, showing a control panel with several checkboxes and input fields:

- Allow Windows-based access (User ID:)
- Allow Web-based Profile Access (Voter ID:)
- Allow Polling access
- Allow Membership access

Below the control panel, there is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. The main area displays a table of voters with 2 records found. The table has the following columns: ID, Last Name, First Name, MI, Address Type, Street, Street 2, City, State, Zip Code, Birth Date, and Gender. A red arrow points to the 'Billie Bob Pierre' record in the 'First Name' column.

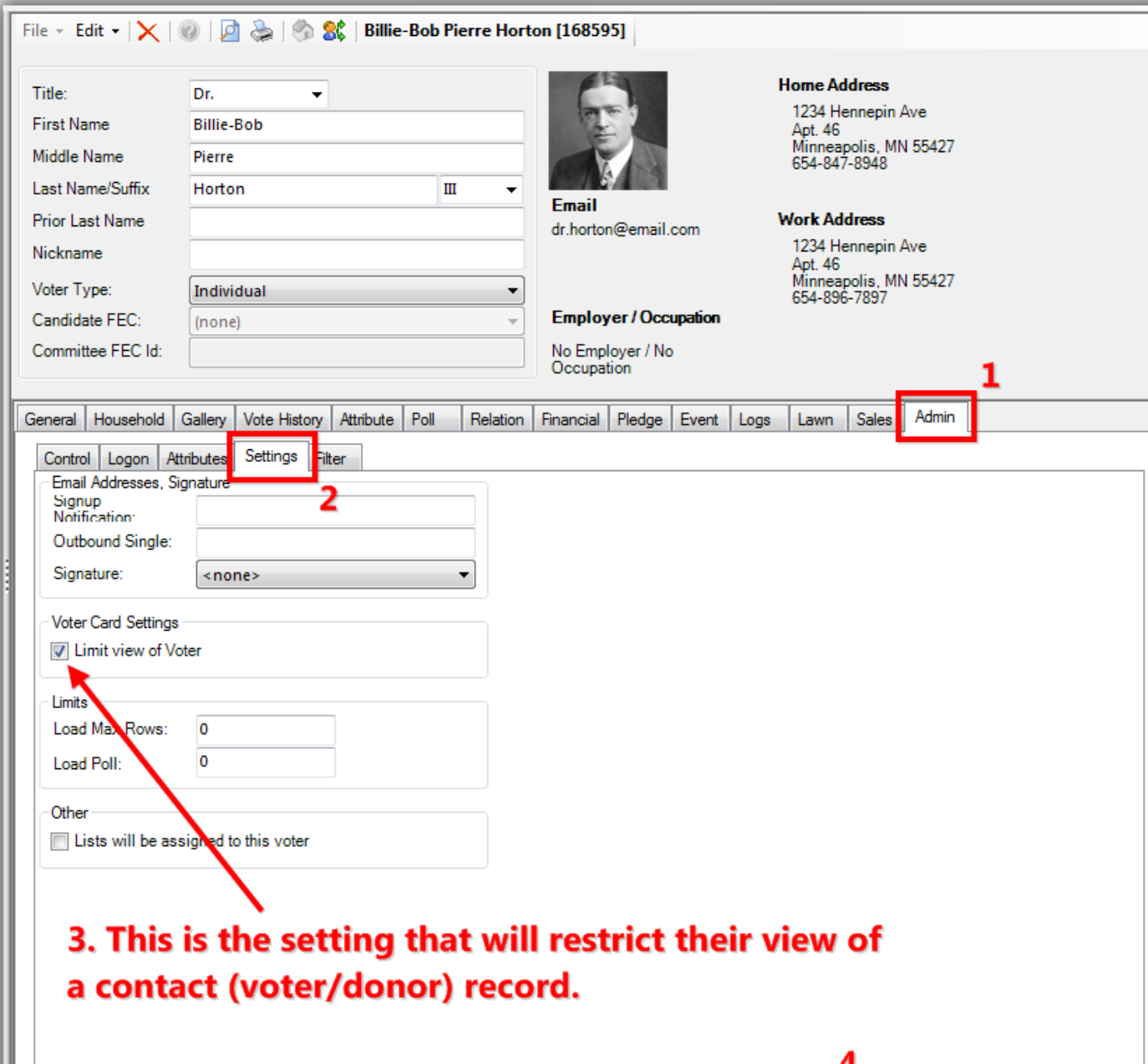
ID	Last Name	First Name	MI	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gender
168595	Horton	Billie Bob	Pierre		1234 Hennepin Ave	Apt. 46	Minneapolis	MN	55427	2/15/1984	M
151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	4/6/1989	M

Click on the user's name to open their contact record card.

Navigate to **Admin > Settings > Check the box for 'Limit view of Voter/Donor' > [Save and Close]**. *My example is below.*

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How to Restrict a Database User's View of a *Voter/Donor Record* by Filtering their Login Access using the 'Limit view of Voter' Setting



File Edit X [Icons] | **Billie-Bob Pierre Horton [168595]**

Title: Dr. [v]
First Name: Billie-Bob
Middle Name: Pierre
Last Name/Suffix: Horton III [v]
Prior Last Name:
Nickname:
Voter Type: Individual [v]
Candidate FEC: (none) [v]
Committee FEC Id:

Home Address
1234 Hennepin Ave
Apt. 46
Minneapolis, MN 55427
654-847-8948

Work Address
1234 Hennepin Ave
Apt. 46
Minneapolis, MN 55427
654-896-7897

Email
dr.horton@email.com

Employer / Occupation
No Employer / No Occupation

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales **Admin** ¹

Control Logon Attributes **Settings** Filter ²

Email Addresses, Signature
Signup Notification:
Outbound Single:
Signature: <none>

Voter Card Settings
 Limit view of Voter

Limits
Load Max. Rows: 0
Load Poll: 0

Other
 Lists will be assigned to this voter

3. This is the setting that will restrict their view of a contact (voter/donor) record.

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That's all there is to it. The 2 images below show an *example* of what a voter/donor record looks like **prior** to filtering user access to be 'limited', and **after**.

Img 1 of 2 – Voter/Donor record **prior** to having a 'limited' view

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View of a Voter/Donor record *prior* to having a 'filtered/limited' view.

File Edit X [Icons] Joel Anders Kristenson [151258]

Title: Mr. [v]
First Name: Joel
Middle Name: Anders
Last Name/Suffix: Kristenson [v]
Prior Last Name:
Nickname: Pepe
Voter Type: Individual [v]
Candidate FEC: (none) [v]
Committee FEC Id:

Home Address:
 9110 Golden Valley Rd
 Apt 10
 Golden Valley, MN 55427
 218-370-1064 Ext 123

Work Address:
 No Address

Employer / Occupation:
 Trail Blazer / N/A

Email: jkristenson@trailblz.com

Financial Pledge Event Logs Lawn Sales Admin

Contribution Refund

Include Exclude New Delete Export Print

<input checked="" type="checkbox"/>	ID	Date	Committee	Amount After Refunds
<input checked="" type="checkbox"/>	2...	7/31/2013	Demo Campaign Database ...	2,500.00
<input checked="" type="checkbox"/>	2...	9/29/2014	Demo Campaign Database ...	40,000....
<input checked="" type="checkbox"/>	2...	9/29/2014	Demo Campaign Database ...	50,000....
<input checked="" type="checkbox"/>	2...	10/6/2014	Demo Campaign Database ...	500.00
<input checked="" type="checkbox"/>	2...	7/1/2016	Demo Campaign Database ...	600.00
<input checked="" type="checkbox"/>	2...	9/13/2016	Demo Campaign Database ...	175.00
<input checked="" type="checkbox"/>	6			93,775....

Committee: Demo Campaign Database - Joel [v]
FEC Type: Federal [v]
Event: Fundraiser Dinner [v]
Election: General 2016 [v] Thank You Sent
Type: Transfer In [v] Thank You Called
Date Received: 9/13/2016 [v] Earmarked Out
Amount: 175.00 **After Refunds:** 175.00
Recurrence: Single [v]
Memo:
 Incoming Earmark FEC Memo Force Itemization
F3I Bundle: (none)
Batch Code: JAK091316
Transfer In: ACME for America \$20,000.00 [v]

How to Restrict a Database User's View of a *Voter/Donor Record* by Filtering their Login Access using the 'Limit view of Voter' Setting

Img 2 of 2 – Voter/Donor record **after** having the 'limited' view activated

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View of a Voter/Donor record card *after* the 'limited view' filter has been activated.

File Edit [X] [Icons] Joel Anders Kristenson [151258]

Title: Mr. [v]
First Name: Joel
Middle Name: Anders
Last Name/Suffix: Kristenson [v]
Prior Last Name: [v]
Nickname: Pepe
Voter Type: Individual [v]
Candidate FEC: (none) [v]
Committee FEC Id: [v]

Home Address:
 9110 Golden Valley Rd
 Apt 10
 Golden Valley, MN 55427
 218-370-1064 Ext 123

Work Address:
 No Address

Employer / Occupation:
 Trail Blazer / N/A

Email: jkristenson@trailblz.com

Address | Contact | Work | Attribute | Contribution

Include Exclude New Delete Export Print Add Partner/Earmark Contribution Resignation Reattribution

<input checked="" type="checkbox"/>	ID	Date	Committee	Amount After Refunds	Election
<input checked="" type="checkbox"/>	2...	7/31/2013	Demo Campaign Database ...	2,500.00	Genera
<input checked="" type="checkbox"/>	2...	9/29/2014	Demo Campaign Database ...	40,000....	Genera
<input checked="" type="checkbox"/>	2...	9/29/2014	Demo Campaign Database ...	50,000....	Genera
<input checked="" type="checkbox"/>	2...	10/6/2014	Demo Campaign Database ...	500.00	Genera
<input checked="" type="checkbox"/>	2...	7/1/2016	Demo Campaign Database ...	600.00	Genera
<input checked="" type="checkbox"/>	2...	9/13/2016	Demo Campaign Database ...	175.00	Genera

Committee: Demo Campaign Database - Joel [v]
FEC Type: Federal [v]
Event: Fundraiser Dinner [v]
Election: General 2016 [v] Thank You Sent
Type: Transfer In [v] Thank You Called
Date Received: 9/13/2016 [v] Earmarked Out
Amount: 175.00 **After Refunds:** 175.00
Recurrence: Single [v]
Memo: [v]
 Incoming Earmark FEC Memo Force Itemization
F3I Bundle: (none) [v]
Batch Code: JAK091316 [v]
Transfer In: ACME for America \$20,000.00 [v]

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The **related resources** below provide links to similar articles and videos such as how to add a new user, revoke a user's access completely, filter their access by other specific criteria, and much more.

If you're concerned about the user's access please give us a call – it's also useful to log in as the user to see what access they have prior to issuing credentials.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Adding a Database User and Setting their Security Settings](#)

Article: [Filter Database Access for Different Users by things like Address, a Saved Search Query, and a Specific Attribute](#)

Article: [How to Change your Username, and/or Password Credentials](#)

Article: [Revoke a User's Access to your Database](#)

Article: [Email Notification of Web Occurrences](#)

Article: [Website Email Notification](#)

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Article: [How to Access Trail Blazer Remotely on an iDevice \(iPod touch, iPad, or iPhone\) using the Free Microsoft Remote Desktop App](#)

Article: [How to Setup and Use the Mobile Poll Watching App](#)

Article: [Mobile Base Camp – How to Create and Run a Mobile Canvassing \(Walk\) List](#)

Article: [Mobile Base Camp – Contact Search](#)

Article: [Configure Microsoft Remote Desktop – For Mac Users \(*Logging into Trail Blazer on your Mac*\)](#)

Video: [Canvass Your Neighborhood with Our Mobile Canvassing App](#)

Video: [Mobile Canvassing](#)

Video: [2X iPad Install and Configure](#)


Video: [Multiple Database Logon](#)

Video: [Eblasts –Setting people up to receive test \(draft\) emails](#)

Video Playlist: [Getting Started](#)

Website: [Free Introduction Training Class for Trail Blazer](#)

Trail Blazer Live Support

 **Phone:** 1-866-909-8700

 **Email:** support@trailblz.com

 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

 **Twitter:** <https://twitter.com/trailblazersoft>

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** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

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** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*