Upload Voters
User Guide

UPDATED Oct. 19, 2022

VOTERS: UPLOAD CSV (STEP 1: CSV FILE UPLOAD)

If you have multiple users to upload, or to set up your initial voter database, use the "Upload CSV" option. This allows you to upload a .CSV (comma separated value) file of members – as you would export from Excel, Access, or another database program.

The Autocreate Groups (1) and Default Group (2) options only apply if you have voters organized into districts or groups.

1 Autocreate Groups will automatically create any group in the upload file and add voters to the group. To set or change the vote weights for the group, go to the Groups section on the side navigation.

2 Default Group allows you to assign all of the voters in the upload file to a group without including that group name in the upload file. Default Group requires that you have created the group in the Voting Manager Groups section prior to the upload.

3 Browse for your voter file here & then select Upload CSV File. You will have an opportunity to match your header row titles on the next screen.

First Name	Last Name	Member	Email Address	Group	Email	Email
Jonathan	Brown	123	jbrown@me.com	Western Region, Students	jon@av.com	jlb@hotmail.com
Kim	Harwood	456	kim@kjindustries.com		kim@hotmail.com	kimh@me.com
Wende	Crane	789	wende@hotmail.com	Western Region	wende@av.com	
Rhonda	Jones	469	JonesR@abc.com			
Jennifer	Abbott	876	jabbott@abbottind.com			

If your voter has more than one email, add the additional email columns to the csv file. See Voter Jonathan Brown above. he has three email addresses.

VOTERS: UPLOAD CSV (STEP 2: MATCHING COLUMNS)

The next step to uploading users is to match your fields to the database columns. Below is an example screen with labels of each section.

1   Your header row.

2   Your first voter record from your file.

3   The Election System field titles. Select the appropriate match.

4   When complete, click the "Apply Column Matching" button.

VOTERS: UPLOAD CSV (STEP 3: REVIEW UPLOAD)

On the Review Upload screen you can see that **New** voters (14 in this example) are ready to add to the election. If the CSV had any previously added voters in it, they would appear in the **Update** count. Any records that were rejected (4 in this example), they appear in the **Rejected** count. See page 20 for Troubleshooting Rejected records.

Success: CSV file received.			
1. File Upload	2. Match Columns		4. Process Upload
New: 14	Update: 0	Reject: 4	Exclude: 0

If you want to exclude a record you can use the **Include/Exclude** column to remove the record from the upload (A). You can download a CSV for New, Update, Rejected or Excluded records, simply by clicking on the **Count Heading**.
• Example: For a download of the 14 New records, select "New: 14" above.

Row #	A In/Exclude	B Status	First Name	Last Name	Member Number
1	Included	Reject - Missing field: Member Number	Jonathan	Brown	
2	Included	Reject - Missing field: Last Name	Kim		456
3	Included	New	Wende	Crane	789
4	Included	Reject - Duplicate later in same file.	Rhonda	Jibby	65998
5	Included	Reject - Duplicate input of row 3.	Nicole	James	65998
6	Excluded	New	David	Zoo	66000

Every record in your upload file will be listed on the review screen. If a record is rejected, you can see the rejection reason in the status column (B).

VOTERS: UPLOAD CSV (STEP 4: APPROVE UPLOAD)

Once you have made any exclusions and are ready to upload the records on the review screen, simply tap "Approve Upload" at the bottom of the screen. You MUST select "Approve Upload" to finish Step 4: Process Upload.
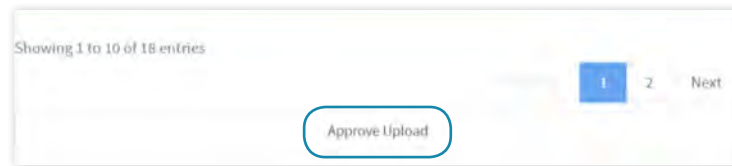
VOTERS: UPLOAD CSV (TROUBLESHOOTING)

What do I do with my rejected records?

You have two options if your upload file has rejected records:

1 Continue with the upload of the file and process all rejected records later.

2 Abandon the upload process on Step 3: Review Records & upload all records later once you have fixed the rejected records.

Option #1: Process the rejected records separately.

Rejected records are NOT saved in the system.

1 Download the Reject CSV File by selecting the "Reject:" button (A) .

2 Review the file Reject Reason (B) and fix the records. If you have a few records to fix, simply Add the members individually via the Voters > Add section in the VM. If there are many rejected records you can fix the records, remove duplicates, etc then save the repaired rejected records in a new file for upload.

3 Upload the new CSV file & process all the way through step 4, which requires selecting the "approve upload" button.

Success: CSV file received.

1. File Upload	2. Match Columns		4. Process Upload
New: 14	Update: 0	Reject: 4 (A)	Exclude: 0

Status	Reason	First Name	Last Name	Member ID	Email	Group
Reject	Duplicate later in same file.	Joe	Liao	141	joe@lilly.com	Genetics
Reject	Duplicate input of row 602.	Joe	Liao	141	joe@lilly.com	Genetics
Reject	Duplicate later in same file.	Lori	Voeghtly	178	Lori@gmail.com	Genetics
Reject	Duplicate input of row 1080.	Lori	Voeghtly	178	Lori@gmail.com	Genetics

(B)

Option #2: Abandon the upload to fix your original file.

In the example above, none of the 18 records were uploaded to the system.

1 You will download the Reject CSV file as in step 1 above and review the reject reason as in step 2 above. However, you will make changes to the rejected records in your upload file (example: 18 record file).

2 Once your updates are complete, in our example above we removed the second Joe Liao record and removed the second Lori Voeghtly record.

3 Save the repaired CSV file and started the upload process all over again (see page 13).