AssociationVoting
online voting made simple

Voting Manager Overview

UPDATED Oct. 19, 2022

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Welcome to online voting by **AssociationVoting.com**. Thank you for using our voting service!

Voting member login

In your welcome email, you will receive a URL for accessing your voting site as well as a username and password. You will need this to sign in as the voting manager.

Using the online voting manager area, you can:

- Manage your user account settings
- Set ballot open and close time
- Edit text displayed to voters during the voting process
- Manage (add/browse/delete/upload) membership list
- Manage ballot items – positions and propositions (Bylaws)
- View real time voting results

Voting Manager login

On the following pages, we will walk through each major step to set up online voting. The setup process is simple and follows the side navigation from top to bottom. We start at your Voting Manager Dashboard and end with real time Election Results. After we cover the Voting Manager (admin portal), we will briefly review the member voting experience.
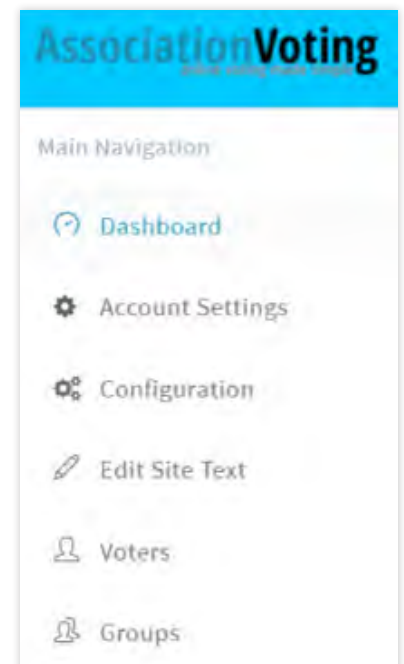
Right: Voting Manager Side Navigation opened.

VOTING MANAGER: DASHBOARD

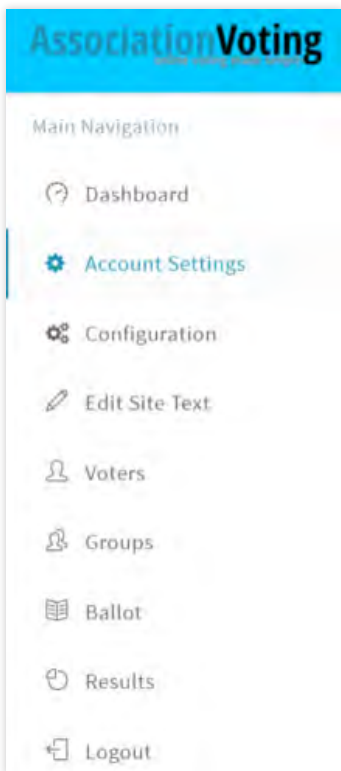Once you sign in with the Voting Manager account, you see the Voting Manager Dashboard page.

1 Menu (open/close side navigation)

2 Account identifier

3 Sign out

4 Link to election site

5 Side navigation (closed)

6 Manage voters & number of voters

7 Manage positions on ballot
   & number of positions

8 Manage propositions on ballot
   & number of bylaws

9 Results to-date & review results
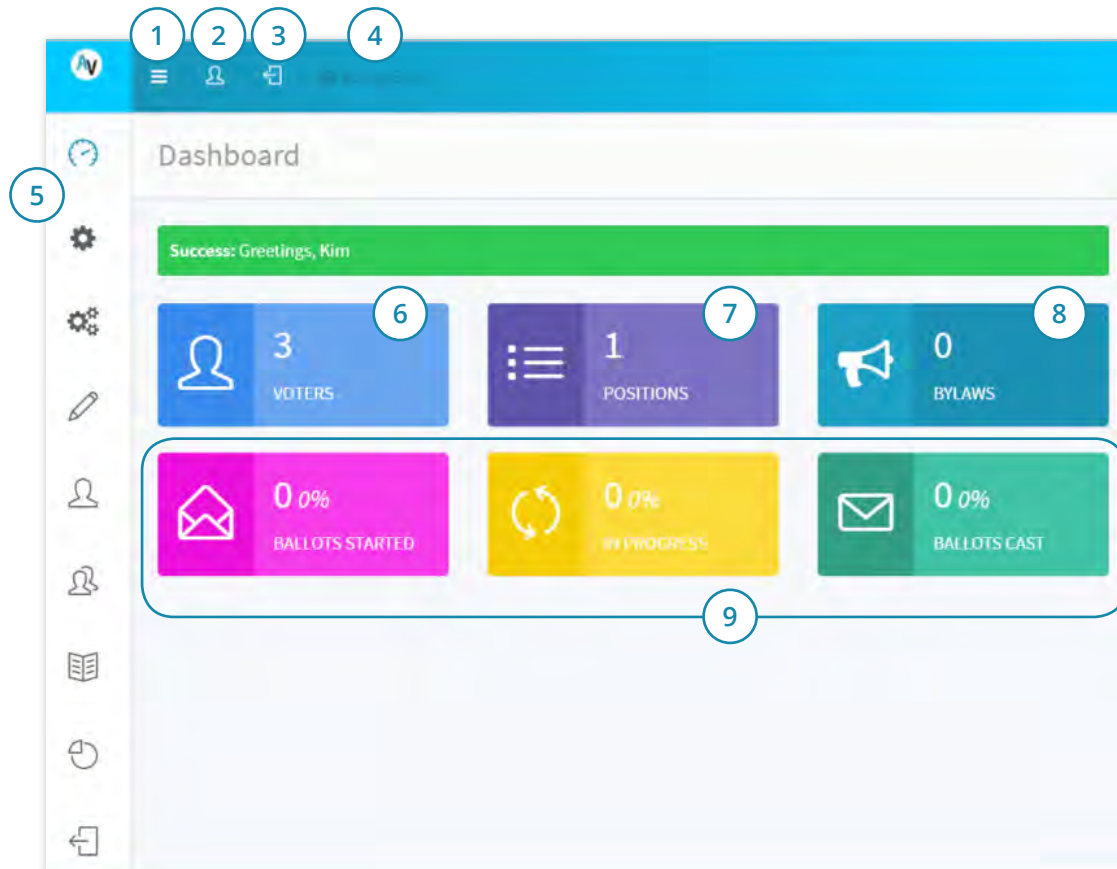
VOTING MANAGER: ACCOUNT SETTINGS

The first option, "Account Settings", lets you change your email or password.

Keep the Voting Manager email address current. If you forget your password,
you can request a password reset at the Voting Manager login screen.

VOTING MANAGER: TABLE CONTROLS

Throughout the Voting Manager, data will be listed in tables. The Browse Voter, Browse Groups, Ballot Positions, Position Candidates, and Bylaw Amendments (propositions) pages all include a table view of the election data. All tables in the VM have many functions to make managing your information and election easier. Please see the diagram of the Browse Voter table below to better understand each function.

1   Search: Search voters based on any column listed in the table.

2   Show/Hide Columns: Select which columns to show from a list of all columns.

3   Action buttons: Edit or Delete a voter based on the action buttons to the left of the voter listing.

4   Download CSV: Download the table as a CSV Excel file.

5   Sort order: Change the sort order of the table based on column (ascending /descending).

6   Display Records per page: 10 to 100 records.

7   Total records in the section

8   Go to Page

9   Additional Action buttons above the table.

10 Ballet Order: Change the order of a listing on the ballot with arrows. e.g. positions order, candidate order, bylaw order.

CONFIGURATION: BRANDING

Election website configuration consists of the following options: Branding, Support Email, and Credentials. Below is the branding screen, where you can edit your voting name, logo, and colors. Be sure to click the **Update Branding** button at the bottom left side of the screen to save your changes.

Your Association/Company

Name	Association Name
URL	http://www.associationvoting.com

1   Your association name will be displayed on the Election Website and link to your URL so voters can return to your website.

Your Logo and Colors

Current Logo

2   Your logo will be prominently displayed on the election site. Please note PNG format is preferred. Max size 1MB

New Logo   Choose File No file chosen

Please provide a PNG (preferred), JPG, or GIF image no more than 1MB in size.

Header Color	white
Primary Button Color	#1587ab
Primary Button Border Color	#1aacd9
Primary Button Text Color	white

Update Branding

3   Use the color picker or type in the color code to change colors for buttons, text, and your site header.

CONFIGURATION: SUPPORT EMAIL

Your Voting Manager will receive support email requests from your voters. AV provides an automated 24/7 support form to help valid voters receive login credentials.

All other support requests are forwarded to the "Support email" address/s provided here. Separate multiple email addresses with a comma.

Typically the requests are from invalid voters looking for access to the election. (E.G. A past member who was not included on the Valid Voter List.) Your staff will be able to add and delete voters in the Voting Manager.

CONFIGURATION: CREDENTIALS

You can control your Voters' Credentials here. Your voters will be prompted via the election login screen to provide these credentials to access to the ballot. Typically, the credentials are 2 fields. The Credentials table below has several columns with explanations.

1 **DB Field:** These are the system fields available to you for each voter.

2 **Enabled:** Select "Enabled" for any voter field you want included in the system. Typically, first and last names are included to personalize the election site and are included on reporting. *Email address is required if you plan to send announcements through AV as well as for the automated login credentials help form on the election site.*

3 **Unique:** You MUST select one of the 2 login fields to be unique to the voter. Typical unique fields are member number, email, or password. If the field value repeats for any voter in your upload file, the voter will be rejected!

4 **Login 1:** First field displayed on the login screen. Must be populated for all voters (no blanks)

5 **Login 2:** Second field displayed on the login screen. Must be populated for all voters (no blanks)

6 **Label:** If you would like the field name to be labeled differently on the Login screen and throughout the election website, you can change it on the Label field. E.g. "Username" becomes "User Login."

Click the Update Credentials button on the bottom right to save your voter credentials.
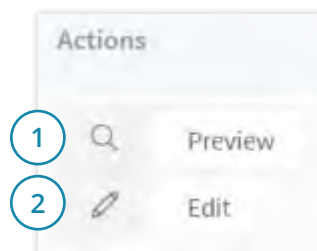
EDIT SITE INSTRUCTIONS

The voting experience for members includes several parameterized text blocks:
the message on the front page, the first page of instructions, the thank you page
on completion of voting. These are all editable through the "Edit Site Instructions"
menu option of the Voting Manager.

Main Navigation

- ☉ Dashboard
- ☼ Account Settings
- ⚙ Configuration
- ✎ Edit Site Text
- ⅃ Voters
- ⅃ Groups
- 📖 Ballot
- ☉ Results
- ⤶ Logout

Edit Site Text

| Block Name	Description	Actions	
Ballot Not Yet Open	Message displayed when the ballot is not yet open. There is one template value, {{openingday}}, which will be populated by the opening date and time.	🔍 Preview	✎ Edit
Ballot Closed	Message displayed when the ballot has closed. There is one template value, {{closingday}}, which will be populated by the closing date and time.	🔍 Preview	✎ Edit
Login Screen	These instructions will appear above the login screen. There are two template variables available -- {{openingday}} and {{closingday}} -- which provide the opening and closing day of voting, respectively.	🔍 Preview	✎ Edit
Welcome and Instructions	This message will be displayed once the member logs in and before he proceeds to the ballot. Any directions, instructions, or overview should go here. Can include {{firstname}} or {{lastname}}	🔍 Preview	✎ Edit
Positions/Candidates Instructions	Specific instructions that appear before the positions/candidates section of the ballot.	🔍 Preview	✎ Edit
Ballot Cast Already	This message appears when the member has already cast his ballot. It has one template variable, {{casttime}}, that will be filled in with the date and time that the ballot was cast.	🔍 Preview	✎ Edit

From the Edit Site Instructions listing,
you have two types of actions :

Actions

1 🔍 Preview

2 ✎ Edit

1   Preview the block of text

2   Edit the block of text

EDIT SITE INSTRUCTIONS (CONT.)

When you select a text block to edit, it opens in an in-browser editor. You can use HTML styling and links to format the text block for display.
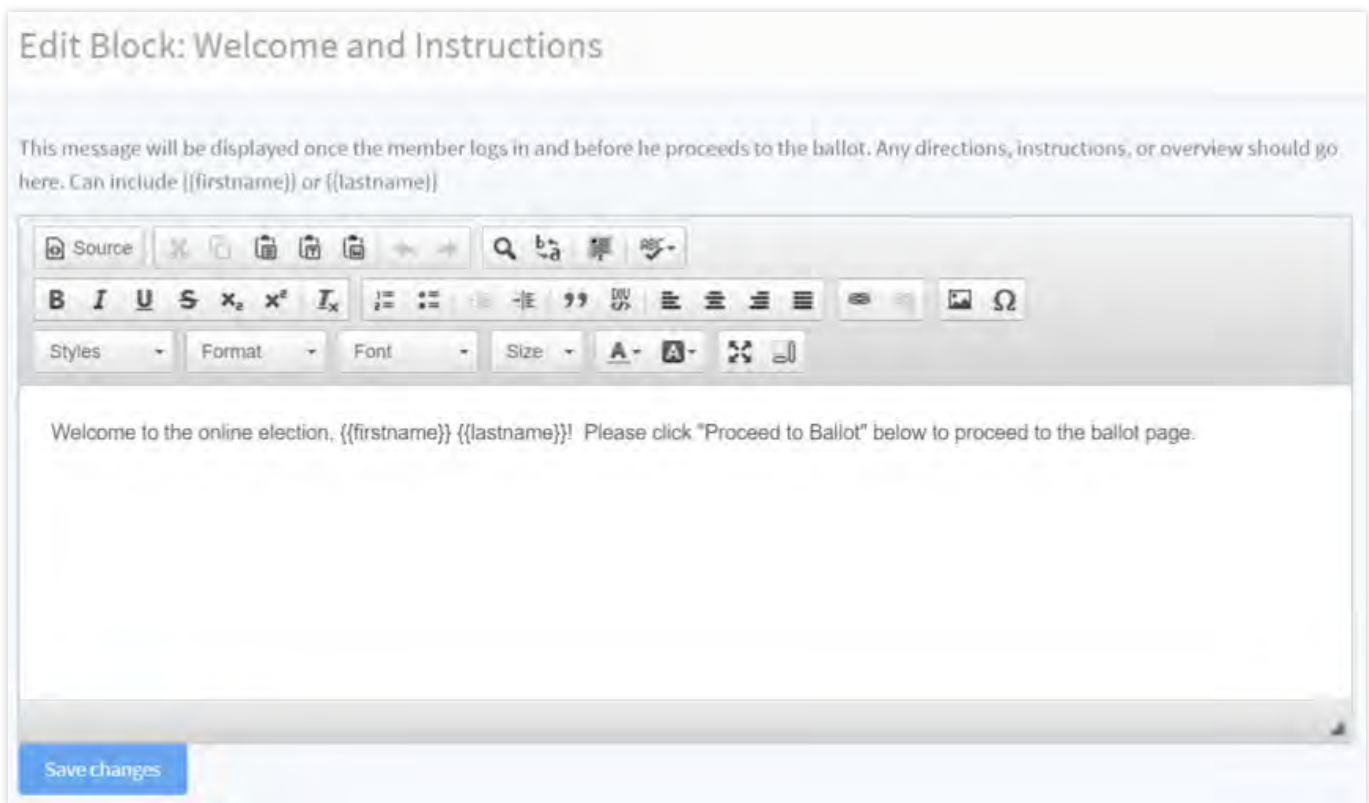

Template Variables

For certain text blocks, there are variables that can be included in the text for display. For example, the template "Ballot Cast Already" includes a template variable "casttime" that will display the time when the member cast his or her ballot.

Template variables should be included in curly braces, **e.g. {{casttime}}**. If there is a template variable, it will be identified in the text block description that appears above the editor.

GROUPS

One of the features of our voting software is the ability to deliver customized ballots to each member based on that member's group (or region or district) membership. If you click on **Groups/Browse**, you will see a basic interface for creating, renaming, and deleting groups.   Each group is listed here. Via the **Action** buttons, you can edit or delete the group, as well as view members of the group. To add a group select the **Add** button in the top right corner.
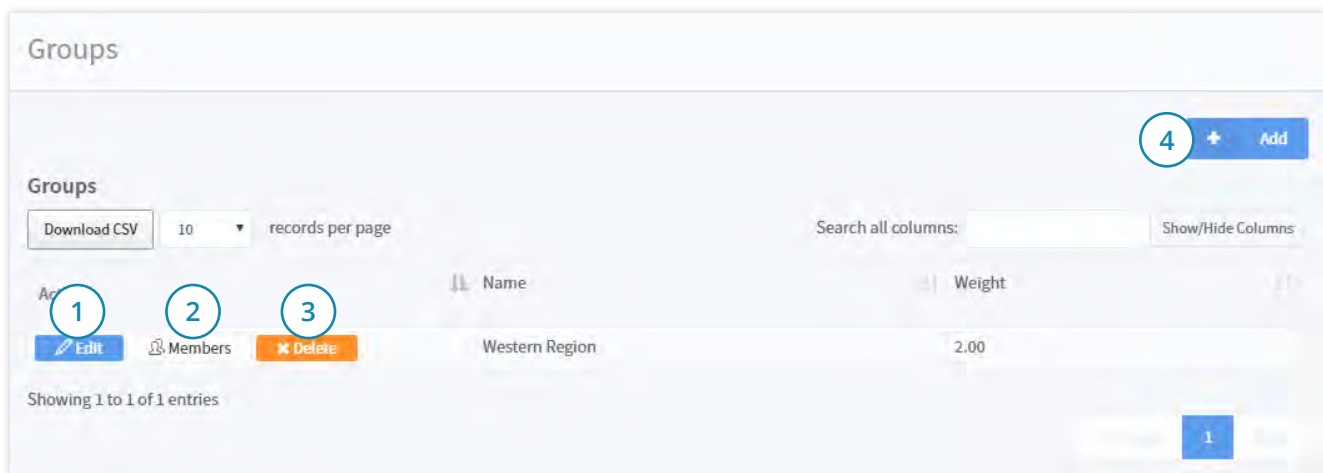
1   Edit: edit your group

2   Members: view members of the group

3   Delete: remove all members of the group

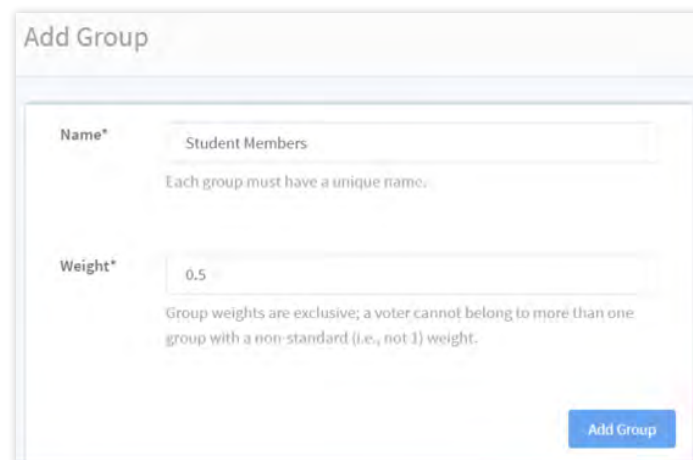4   Add: add a new group (more details on following page)

When you delete a group, all members assigned to that group will be removed from the group. Those members will not be removed from the database though. Similarly, positions or propositions assigned to the group will no longer be assigned to the group – but they will still be on the ballot.

GROUPS: ADD A GROUP

Adding a group is easy. Simply provide a **name** and a **voting weight** for the group (e.g. A student member's vote counts for ½ that of a member. Any voter added to the Student Member group would have a voting weight of 0.5). Default weight for groups is 1.

In the software, a group is just a label. Thus, it is possible to have groups "Region 1" and "Region 2" and to have a member that belongs to both of these.

*Exceptions may apply depending if non-standard weights are applied in Exclusive Weighting. Ask an AV Support member if you have questions on group weights.

We advise creating Member Groups day one of setup to ensure ballots are restricted and votes weighed correctly from the beginning.

• Uploading the group member list is covered in the Voter Upload section.
• Personalizing the ballot items to restrict access to only members in a specific group is addressed in the Ballot section.

VOTERS: BROWSE

You can manage Voters in this section. You can browse a list of voters, add voters, upload a voter CSV file and delete voters.
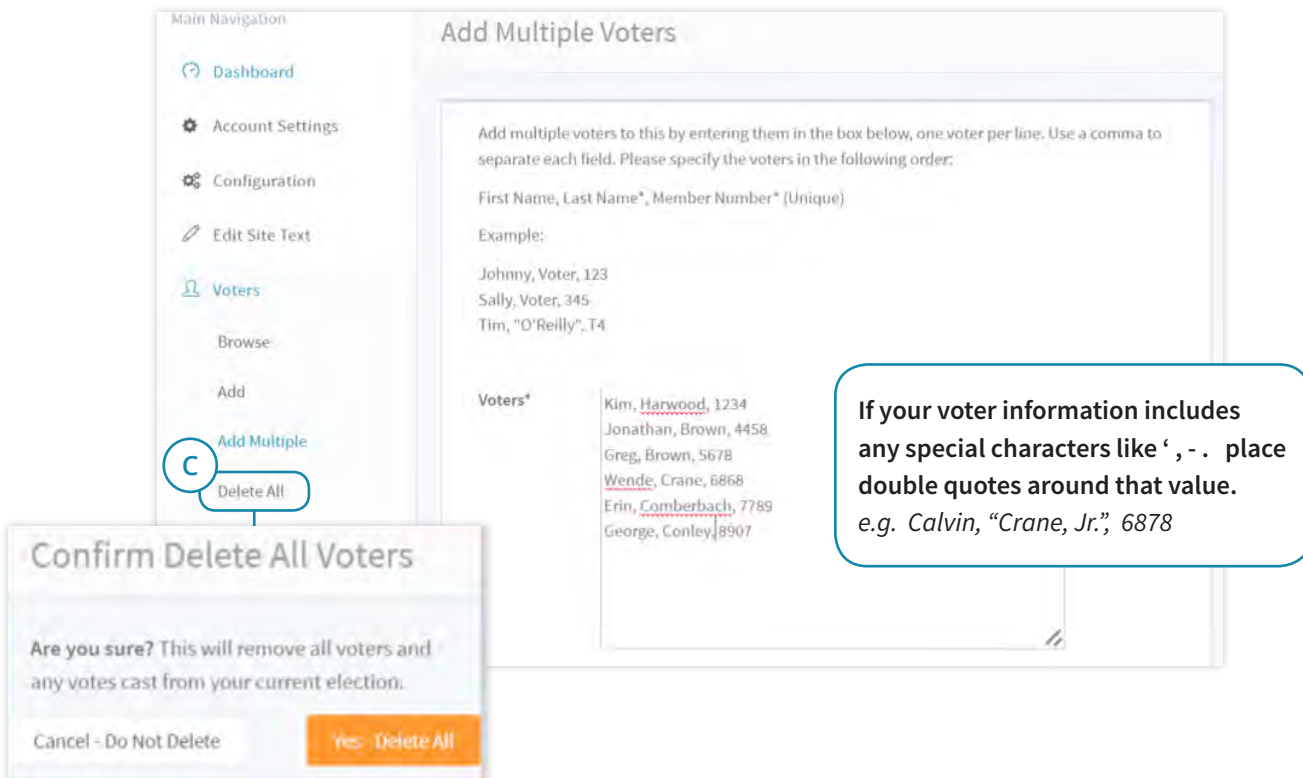

1   **Search**: You can search voters based on any column listed in the table.

2   **Action buttons:** You can Edit or Delete a voter based on the action buttons to the left of the voter listing.

3   **Add**: Add a single voter to the system or add multiple voters.

4   **Download CSV**: Download the table as a CSV Excel file.

5   **Sort order**: Change the sort order of the table based on column (ascending /descending)

VOTERS: ADD

On the Add Voter screen, you can add a single voter. The fields displayed are dependent on those you chose earlier on the Credentials screen. Note the **Login 1 (Last Name)** (A) and **Login 2 (Member Number)** (B) fields are required, as shown in the screen below. You can add the member to a group here as well.
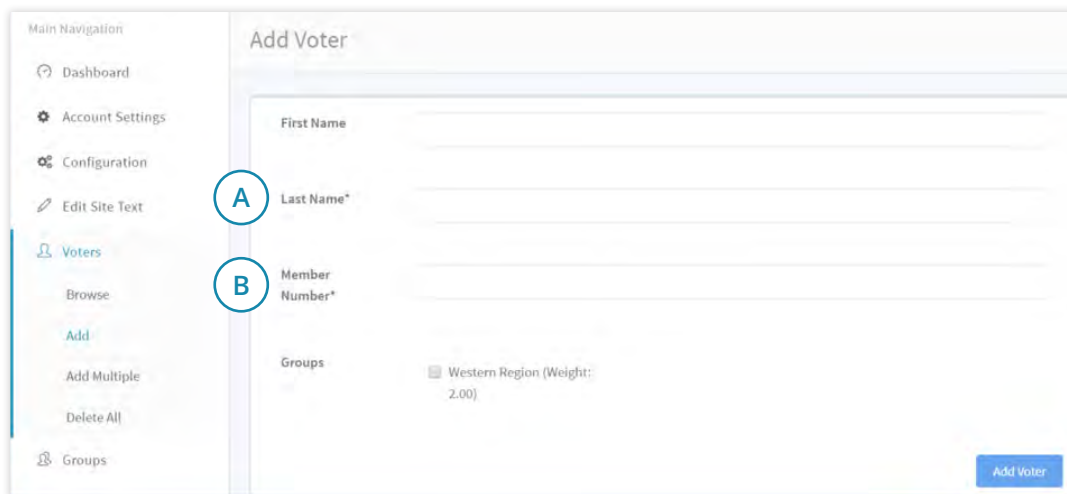
If you have a series of voters, add them with the **Add Multiple Voters** box. Separate each field with a comma and one voter per line (see bottom). To delete all existing voters, click **Delete All** (C) on the side navigation.

If your voter information includes any special characters like ' , - . place double quotes around that value.
e.g. Calvin, "Crane, Jr.", 6878

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.

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.

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.
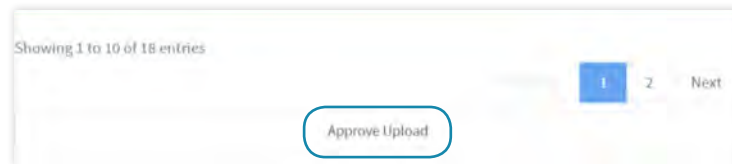
VOTERS: UPLOAD CSV (TROUBLESHOOTING)

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.

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

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).

BALLOT: SETTINGS

The Ballot and Slate are managed via the Ballot section. In the **Election Window**, you can set the start and end date/time for your election, as well as the time zone. **Settings** allows you to name your election, enable voting receipt, and set voting requirements (e.g. may a voter abstain from voting on a position), group weighting rules, ballot candidate order, and more.

We will walkthrough **Positions** and **Bylaws** on the following pages.

Preview displays the ballot as your voters will see it.

Clear offers three options:

BALLOT: POSITIONS

Positions is a list of current positions on the ballot. If no positions exist, click the Add button on the top right. You can set the following on the add position screen:

- Position Title
- Selection Limit (vote for no more than ___)
- Ordinal: Change the position's placement on the ballot.
- Enable write-ins and set write-in limit
- Create a Position description
- Group Restrictions: For each position, there is an option to limit voting to specific groups or have it available to all members. To restrict, click the checkbox for those groups to restrict access to.
  (A member belonging to any of the checked groups will see that ballot item. If the member doesn't belong to any of the checked groups, that member will not see the option to vote on the ballot item.)
- Candidates: you can add candidate names for Positions as well.

From the **Positions** table, use the **Action** icons to edit a position, delete it, view candidates, change the position order on the ballot, or add candidates to the position.
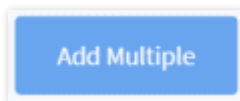
BALLOT: POSITIONS - CANDIDATES

Positions - Candidates is a list of current candidates for a position. If no Candidates exist, click the
Add Candidate button from the Position table.

You can set the following on the **Add Candidate** screen:
* First Name and Last Name
* On-Ballot Description (e.g. Past President or Hartford Insurance Group)
* Biography: Use the WYSIWYG Editor to add links, photos, HTML, etc.
* Photo: PNG preferred. Maximum width of 144px.
* Ordinal: Candidate's position in the candidate listing on the ballot. Default will place candidates
  in the order entered. Alphabetically order or random order may be requested.

Add multiple candidates to this position by entering them, one option
per line, first name, comma then last name. (e.g. Jane, Doe)

BALLOT: POSITIONS - CANDIDATES (CONT.)

From the Candidates table, you can edit a candidate, delete candidate, view candidates, re-order candidate listing on ballot, or download a CSV of all candidates.

BALLOT: BYLAWS AMENDMENTS

Bylaws Amendments is a list of current bylaw amendments or propositions or actions requiring a passing vote on the ballot. If no amendments exist, tap the Add button on the top right. You can set the following on the add Bylaws Amendment screen:

• Title
• Proposition/Question
• Description: here you can place bylaw copy mark-up or details regarding the proposition on the ballot. You can include links and images to this description.
• Options: Add options such as "Yes" , "No", "abstain from voting" in the Options box. Options are listed one per line. You can make changes to the options via the Edit screen later.

Once you have completed the required fields, select the "Add Issue" button.   Your new Amendment will now be listed on the Bylaws Amendments screen (below). From the Bylaws table, use the Action icons (A) to edit a bylaw, delete it, view options, change the bylaws order on the ballot (B), or add new options to the amendment.
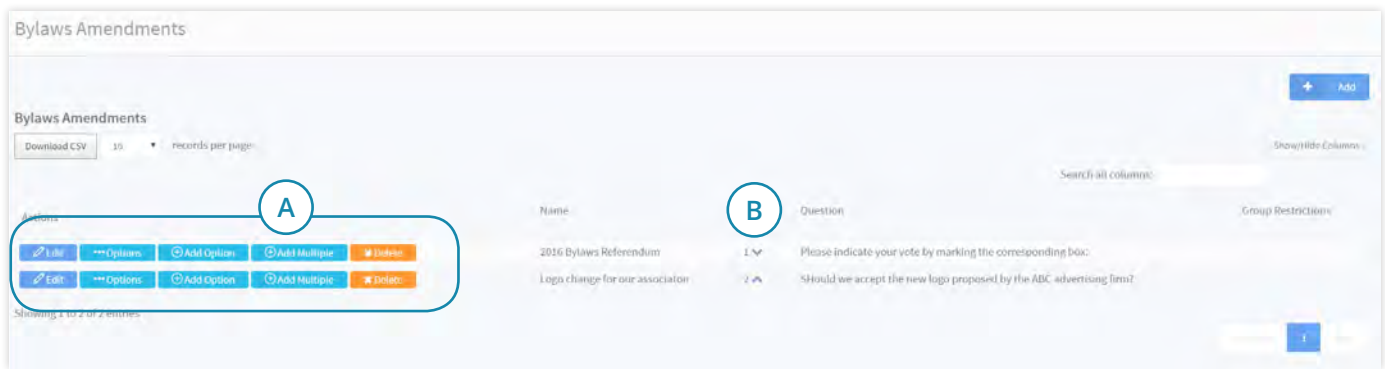
To select the Options Action Button for your Bylaw Amendment, go to the Options screen to the right. From the Options screen, you can:

1   Edit or delete the current options for this bylaw amendment

2   Change the option display order on the ballot

3   Add a new option

4   Add multiple options
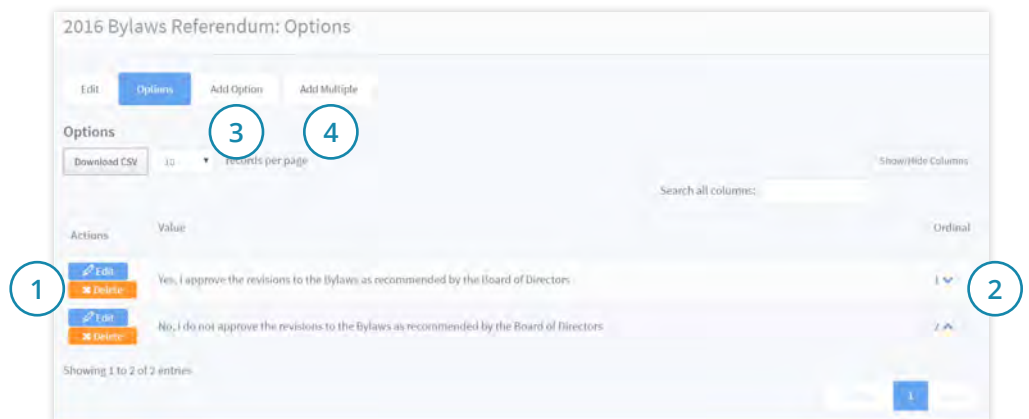
RESULTS: VOTE COUNTS

Once users have cast ballots or have ballots in progress, the results populate on the Dashboard screen and in the Results section. Vote Counts displays real time results for each option for each position or proposition.

President

Download CSV	50 ▼	records per page		Show/Hide Columns

Search all columns:

Option	Unweighted Total	Total
Tom Smoker*	3	5.000
Bob Smoker	1	1.000
Jonathan Brown	0	0.000

Showing 1 to 3 of 3 entries

1

Bold/* - Current top vote getter. *Italic/(Tie)* - indicates tie for the final top-vote-getter position(s).

You can see and download a CSV file list of those who have voted, those who have not voted, as well those who have a ballot in progress.

RESULTS: EXPORT

You can also request an election summary report PDF with details regarding your election results. This report will be emailed to the Voting Manager when requested.

VOTER EXPERIENCE

The voting experience for members is simple and straightforward. The welcome page will either present a notice that the ballot is unavailable (because it is not yet available or has closed) or a login prompt. If you have a designated voting manager contact for voter issues like unknown member number, you may wish to put that on this page.

Top menu options:

1   Link to your website

2   Login Help Form (see below)

3   Link to the Voting Manager

(Login 1 & 2 are based on the voting credentials and labels you selected)
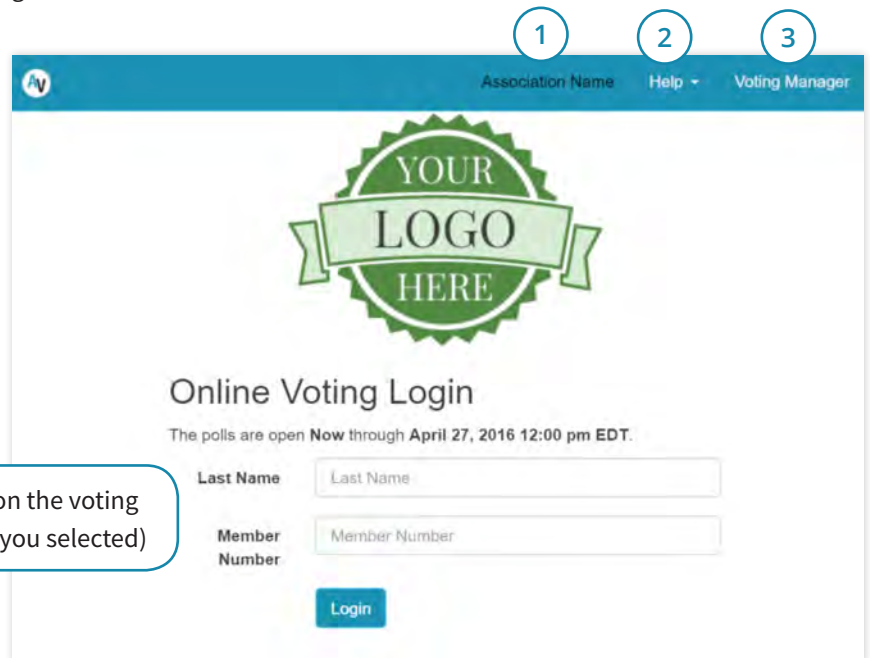
Help Form: Based on the information provided, the system will automatically send voting credentials to the voter's email address. However, this requires that regardless of Voter Credentials, you add the voters' email addresses to the system. If the system can't find the voter in the system, the help request will be routed to the support email address/es associated with your account so you can authenticate the Voter is authorized to vote and follow-up as appropriate.
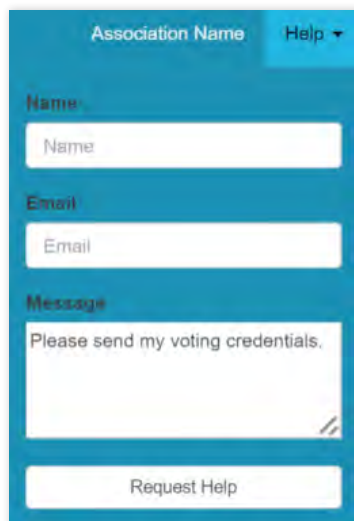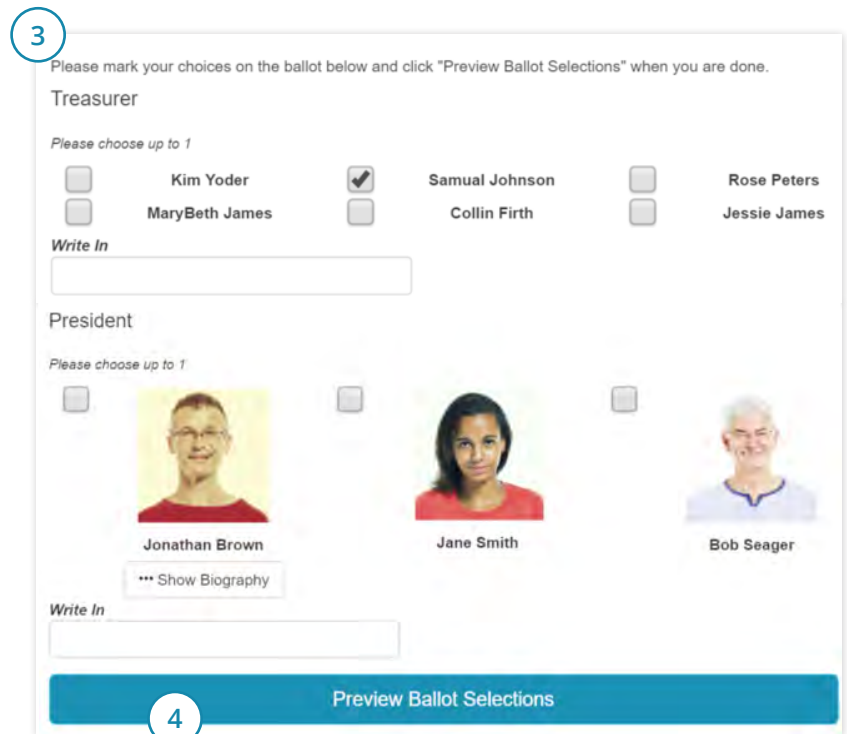
VOTER EXPERIENCE (CONT.)

1 **Welcome Page**: After logging in, members will be presented with an instruction page. This is again an editable message. If there were specific instructions or guidance that would be printed on a paper ballot, this is where that could be reproduced.

2 Select "**Proceed to Ballot**"
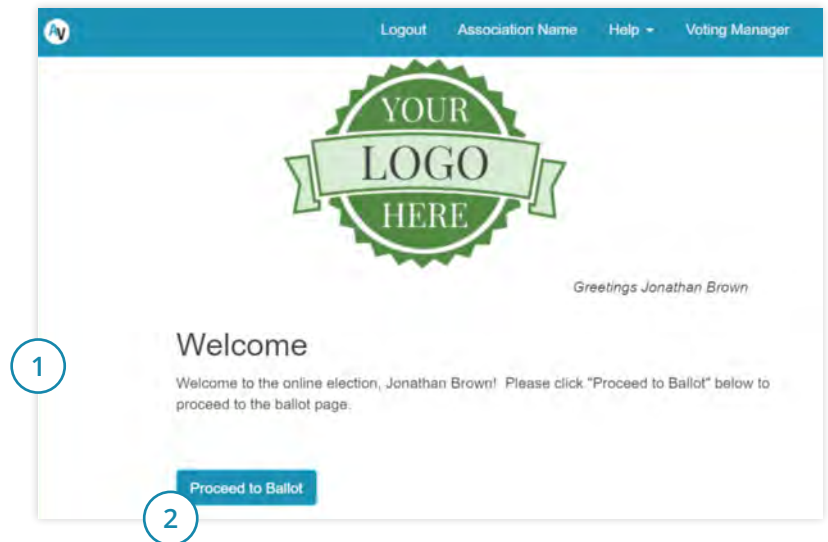
3 **Ballot**: Once through the instructions, the user will be presented with a ballot. Any existing user selections (which might happen if the user previewed & saved but did not cast his ballot earlier) will be marked on the ballot. Otherwise, it will be blank. The ballot will enforce its own constraints – selecting a single option for an proposition, selecting up to the specified number of candidates for a position.

4 Select "**Preview Ballot Selections**"

VOTER EXPERIENCE (CONT.)

1 **Preview Page**: The user will see a summary of his ballot selections and asked to confirm or change these.

2 **Select**: "Cast My Ballot"
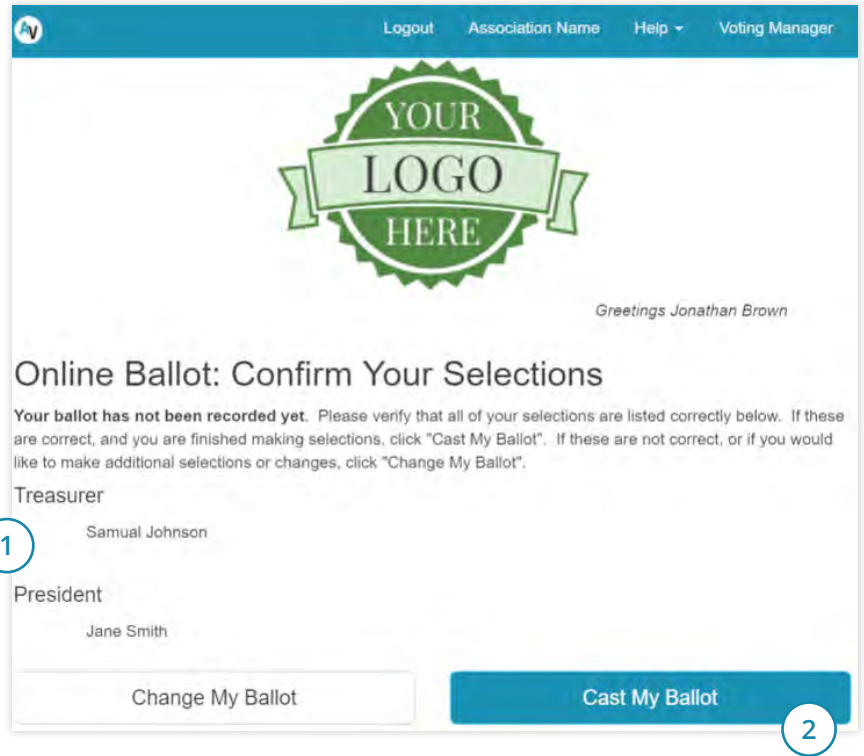
3 There is also a screen warning to **confirm** "Cast My Ballot".

4 **Ballot Cast Page**: Once a user's ballot has been cast, he will see the ballot cast page including Voting Receipt (if selected by VM). The Voting Receipt can be printed and emailed.
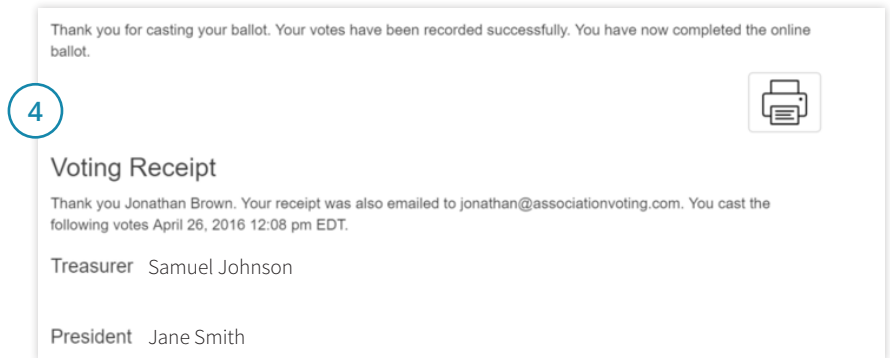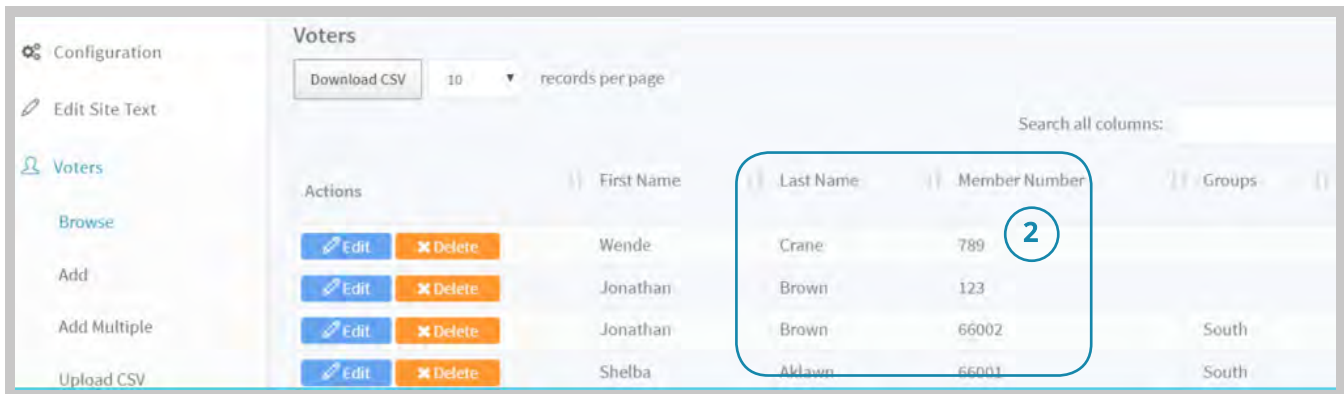
AV TESTING PROCESS

Below are the steps to test your election.

1   In the Voting Manager (VM) dashboard, on the top right hand side is the Testing Mode button displaying the current status of
    testing mode. Select the Testing Mode toggle to change from Testing Mode Off to Testing Mode On. When testing mode is on
    the Orange Warning Bar will display the message "any test votes casts will be deleted" upon exit of Testing Mode.
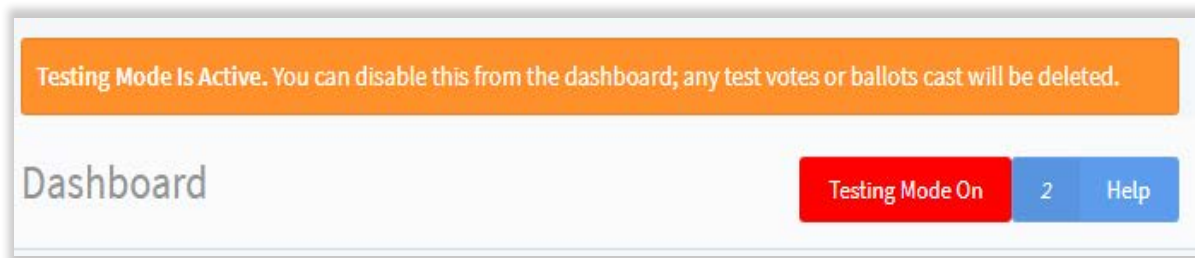
2   Test a Vote: Write down credentials for a few test voters. Go to Voters > Browse to choose member credentials to use to
    login to the ballot. If you have groups, select at least one voter from each group. You will need the credentials for step 4.


3   Go to the Voting Site via the link on the header navigation.

AV TESTING PROCESS (CONT.)

4   Log in as one of the voters from your list in step 2 and vote. Go through the process and finish by casting your ballot. Don't worry, your test votes will clear when you exit Testing Mode! Continue this process until you are satisfied with your testing. To see the voter process, go to Voter Experience on page 20 of the this user guide.

NOTE: While testing mode is on, your election pages will display the "Testing Mode is Active" warning bar.
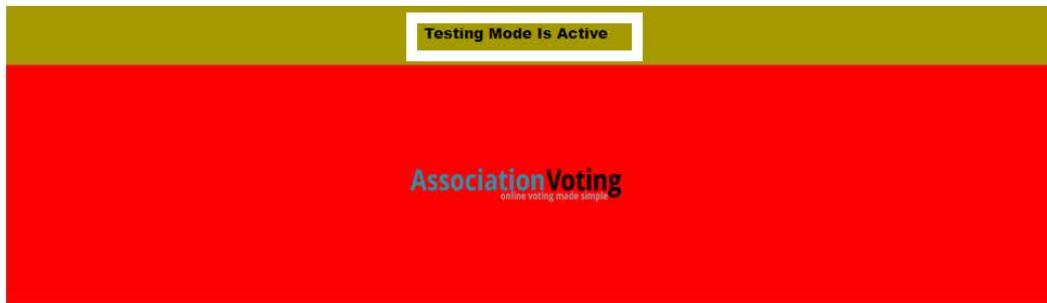
Cast Ballot Process as a Test Voter

Login   *Instruction*   *Ballot*   *Preview*   *Cast*
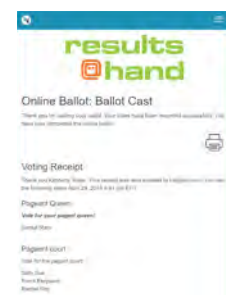
AV TESTING PROCESS (CONT.)

5   Once you are done testing, go back into the VM to exit Testing Mode. Via the side navigation in VM, select the Dashboard link. On the Dashboard Screen, tap the Testing Mode On button to turn testing mode off.

The warning bar disappears from both the VM and Voting Site after turning the testing mode off. You will notice that all votes cast during the test mode will be removed. Any votes that were entered before you went into test mode, will still show up under results.
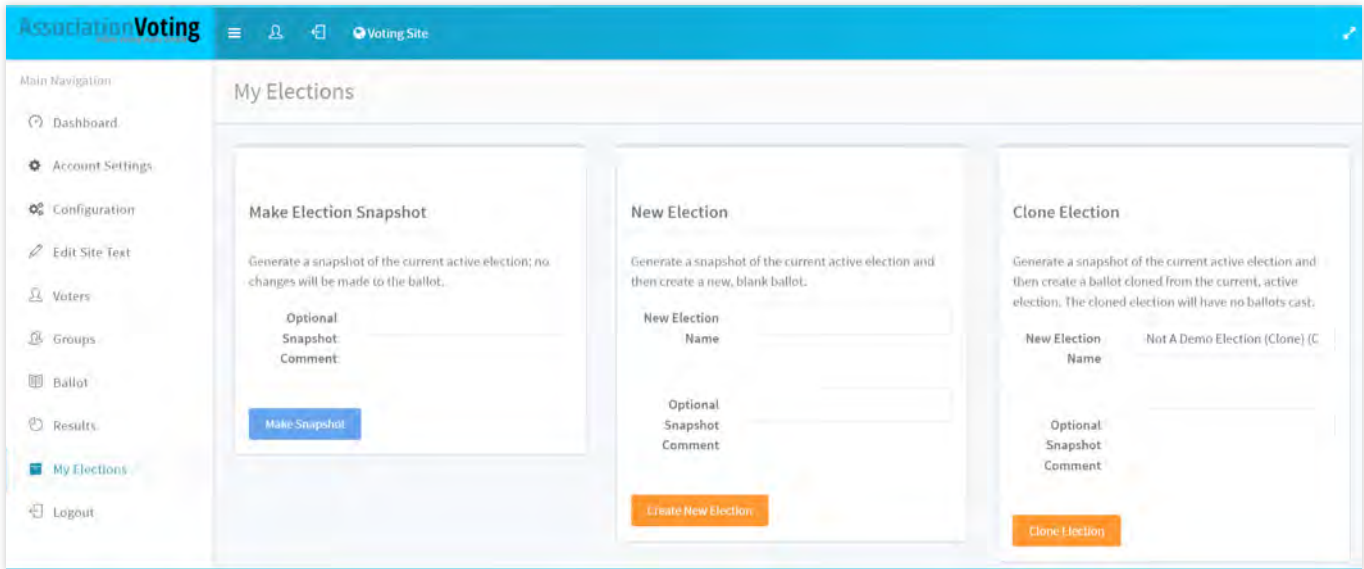
Note: The testing mode will only allow a test voter to vote once. Anyone who had already voted prior to testing mode cannot cast a test vote, as the system will recognize they had already voted.

MY ELECTIONS

Annual subscription clients will have a navigation option titled "My Elections" to manage past elections and create new elections.

Option #1: Election Snapshot
Archive your election results and voting record for review at a later date.

Option #2: New Election
Archive your current election results and voting record for review at a later date. Then create a clean election site for election creation.

Option #3: Clone Election
Archive your current election results and voting record for review at a later date. Then create a clone of the current election ballot for the creation of a new election. No votes will be included in the cloned new election.

MY ELECTIONS (CONT.)

Once you have taken a snapshot of your election (archived it), your election/s will appear in the Elections Snapshots list. You can access this list via My Elections and scroll down the screen to the Election Snapshot sections.

You will have 3 options from Election Snapshots:

1 View: Select the View action to bring up the election results and voting record.

2 Export PDF: Download a PDF report complete with results, voting record, completed ballots, and ballot language.

3 Restore Ballot: Restore this election ballot to the current ballot for the election site.