



**Election Manager** **Guide**

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# Introduction

Setting up an online election can seem daunting initially, but this **Election Manager Guide** will walk you step-by-step through the setup of a typical election, in addition to election management during and after your designated voting period.

Since every organization and institution is unique and may have special requirements, we also have special advanced features which may help service your election needs, and these advanced features similarly have Guides of their own.

If at any time during the election set-up process you feel overwhelmed or have any questions, contact us via the [Support Form](#) on our website or give us a call at **1 (800) 585-9694** during business hours.

## Section One: Pre-Election Set-Up

### Part 1: Creating the Election

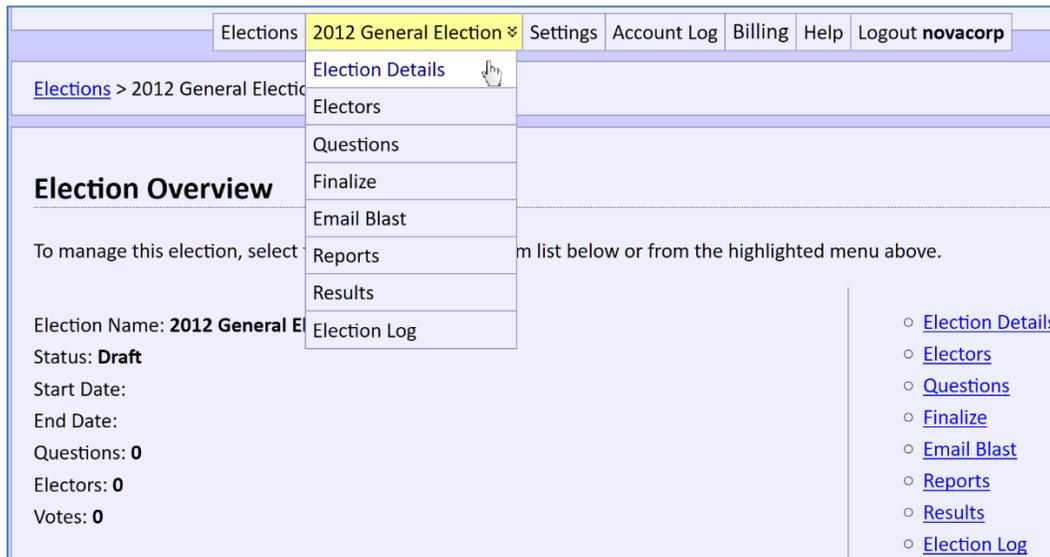
- ⤴ Login into your Simply Voting account by navigating to Simply Voting’s homepage and clicking “**Login**” in the upper right corner. The first page you will see is the **Election Manager’s “Elections”** page. From this initial page you will start building your election.
- ⤴ An **Election** represents a voting event. All elections begin in **Draft** status, and while in **Draft** status your election is fully editable. Your election cannot be voted in until you change the status from **Draft**, as discussed further on in this Guide. You may also have multiple simultaneous or overlapping elections, serving multiple voting events.
- ⤴ In the **Election Name** text field beneath the **New Election** header create a title for your election describing your voting event (e.g. “*2012 General Election*”) and then click the **Create** button. You may optionally **Clone** an existing election to copy over its dates, electors and questions into the new election.



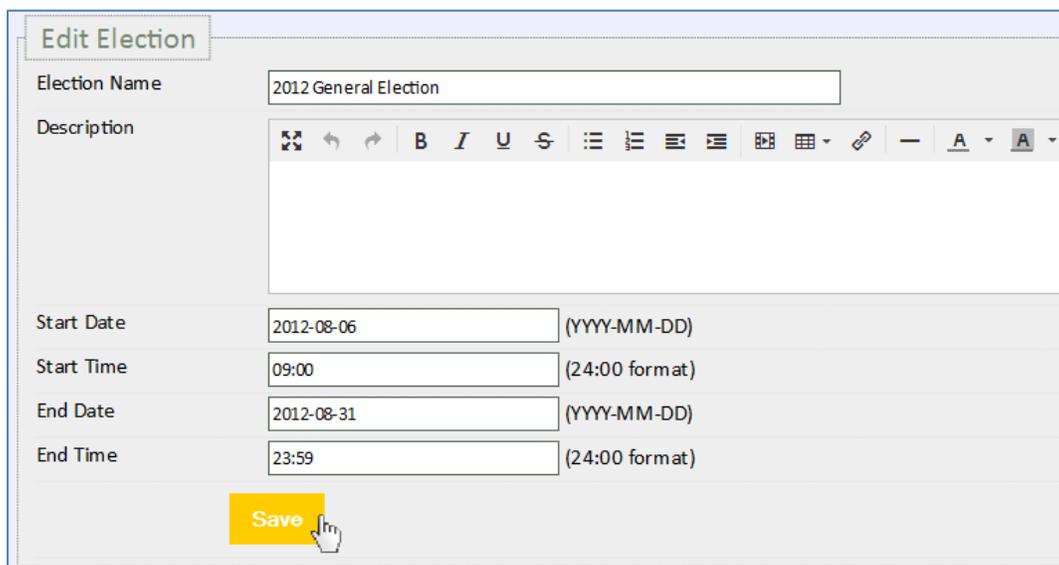
The screenshot shows a web form titled "New Election". It contains two input fields: "Election Name" with the text "2012 General Election" and "Clone this election" with a dropdown menu. Below the fields is a yellow "Create" button with a hand cursor icon pointing to it.

## Part 2: Managing the Election Details

- ✦ After you have created an election, click on its **Election Name** and use the **yellow highlighted drop-down menu** or the **quick jump** page listing to navigate.



- ✦ In the **Election Details** section, beneath the **Edit Election** header, you define the election's **Starting Date and Time**, **Closing Date and Time**, and an optional **Description** describing the election.
- ✦ This **Description** will appear at the top of the election ballot and you may add emphasis by using the **Formatting Buttons** in this **Description**, and in any other **Description** field elsewhere. Clock time corresponds to the time zone selected on your **Settings** page.



- ✦ **Description Formatting Tips:** Hover over a **Formatting Button** if you are unsure about its function. If you have a large amount of text, try using the **“Fullscreen”** button to make your setup easier.

## Part 3: Managing Electors

- ✦ In the **Electors** section, you can start adding eligible electors. **Electors** are all eligible voters that can participate and vote in your election. You can begin by adding electors **Manually** one by one, or you can **Import** electors in-full by setting up and formatting a **.CSV** file with your elector data in it, which will save you time and energy.
- ✦ A properly formatted **.CSV** file, which leaves out column headers or titles, using a common spreadsheet software will look like the sample below. Each column corresponds to elector data:

*Required* - Column 1: Supply a unique **Elector ID** for every elector. In this sample, we have only used numbers, but any input may be used.

*Optional* - Column 2: Supply a **Name** for every elector.

*Optional* - Column 3: Supply an **Email** address for every elector.

**Notes:** Additional columns may be needed if you have opted for **Premium Features**. If you need to specify a **Password** for every elector instead of using a randomly generated **Password**, please contact [Support](#) using the Support page on our website.

	A	B	C
1	110031613	David John Kelly	david.john@example.com
2	110233575	James Kenneth	james.sully@example.com
3	110129426	Lubna Sultan	lubna.sultan@example.com
4	110120844	Sara Amina Sultan	sara.sultan@example.com
5	110134921	Catherine Ella Sum	catherine.sum@example.com

- ✦ To control **Password Type (Alphanumeric vs Numeric)** for automatically generated passwords, and to control **Password Length**, you can adjust these *account wide* configurations on the **Settings** page beneath **Authentication Details** when your account is set to **Standard Authentication**.

### Authentication Details

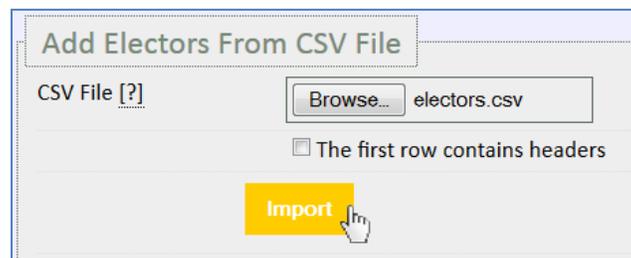
Authentication Method  Standard Authentication  
 POP3 or IMAP server  
 LDAP directory (bind using Elector ID)  
 LDAP directory (use Elector ID to search for DN, then bind using DN)  
 HTTP(S) Authentication  
 Central Authentication Service (CAS)  
 External website login  
 Single sign-on (SSO)

Password Type [?]  Alphanumeric  Numeric

Password Length [?]

## Part 3 continued: Managing Electors

- ✦ What you use for **Elector IDs** is entirely up to your election organizers. We suggest using an **Elector ID** that may already be known by an elector, such as a “Member ID” or “Employee Number” that *is permanently associated* with the voter, and that may already be used for internal tracking in your organization’s own database. Other possibilities include an arbitrarily assigned number or a valid email address.
- ✦ **Important Note:** If you have multiple elections with the same **Electors**, make sure their **Elector IDs** are the same and consistent across all elections. If you have multiple elections with different electors, make sure **Elector IDs** are unique and are NOT recycled or used twice for two or more different voters.
- ✦ If you supply a **Name** for your electors, emails will greet them using their name and when they authenticate themselves and access the voting ballot, their name will be displayed at the top of their screen.
- ✦ If you supply an **Email Address** for your electors, you will be able to use Simply Voting’s **Email Blast** feature to send out voting instructions and credentials to your electors.
- ✦ Electors do not necessarily need to know their **Passwords** in advance since electors can receive them in the above mentioned **Email Blast**.
- ✦ Similarly, election organizers do not need to know any elector **Passwords**.
- ✦ Additionally, if Remote Authentication is used (anything other than **Standard Authentication** on the Settings page), **Passwords** are ignored completely. To investigate Remote Authentication, please contact [Support](#) using the Support page on our website.
- ✦ **Important Note:** If you have some or all of the same **Electors** in multiple elections, these **Electors** will be able to use their unique **Elector ID** (consistent across all elections), and *any Password* to authenticate themselves—a sort of “one stop shopping” approach that allows electors to not have to worry about associating a specific election password with a specific election.
- ✦ Once you have set up your file with elector data, save it as a **.CSV** file and import it into the **Election** from the **Electors** section.



Add Electors From CSV File

CSV File [?]  electors.csv

The first row contains headers

## Part 3 continued: Managing Electors

- Upon import completion, a **Green Success Message** will appear with statistics regarding the recent import. If any **issues** are found, they will be displayed in the message.

### Success

The import has completed.

- 183 electors were **added**

The following issues were found in the imported elector data:

- 2 records were ignored due to having **duplicate Elector IDs**
- 4 records were imported with **invalid email addresses**

- Note:** If you anticipate needing to add, delete, or update electors en masse during an election's voting period, please contact [Support](#) to discuss unlocking additional import operations.
- To find more information about how to properly format a **.CSV** file, please login to your Simply Voting account and refer to the **Help Page** inside the **Election Manager**.
- Once **Electors** have been imported into your election, if you come across any errors in this **Draft** stage of the election, such as a misspelled name (example below), you can **Edit an Elector** by clicking on its blue **Elector ID** link in beneath the **Elector ID** column. You can also sort your data by an individual column by clicking on the column title.

Elector ID ▲	Name ⇅	Email Address ⇅
<a href="#">110534431</a>	Maurice Jones	mj@exxample.com
<a href="#">110559621</a>	Charlene Adams	adama.charlene@example.com
<a href="#">110586244</a>	Toshiro Kobayashi	Toshiro.K@example.com
<a href="#">110586735</a>	Rick Grenstret	Greenstreet.Rick@example.com
<a href="#">110598424</a>	Florence Harlow	Florence.H@example.com

- Once you've fixed any errors, click **Save** to update the elector's entry.

### Edit Elector

Elector ID	110586735
Name [?]	<input type="text" value="Rick Greenstreet"/>
Email Address [?]	<input type="text" value="GreenstreetRick@example.com"/>

SaveCancel

## Part 3 continued: Managing Electors

- ✦ The **Election Log** creates a timestamped activity record that a change was made to an elector. This is accessible either directly in the **Election Log** section, or you can view individual elector activity records through the **Election Log** by clicking on **[show log]** in the **Action** column when reviewing the **Electors** section.

Elector ID	Name	Email Address	Valid Email	Voted	Action
<a href="#">110534421</a>	Maurice Jones	mj@example.com	✓	●	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">110559621</a>	Charlene Adams	adams.charlene@example.com	✓	●	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">110586244</a>	Toshiro Kobayashi	Toshiro.K@example.com	✓	●	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">110586735</a>	Rick Greenstreet	Greenstreet.Rick@example.com	✓	●	<a href="#">[hide log]</a> <a href="#">[delete]</a>

Elector Log		
Timestamp	IP Address	Activity
2012-08-05 14:07:01	190.210.7.120 <a href="#">[ip lookup]</a>	Edited an elector

<a href="#">110598424</a>	Florence Harlow	Florence.H@example.com	✓	●	<a href="#">[show log]</a> <a href="#">[delete]</a>
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## Part 4: Managing Questions

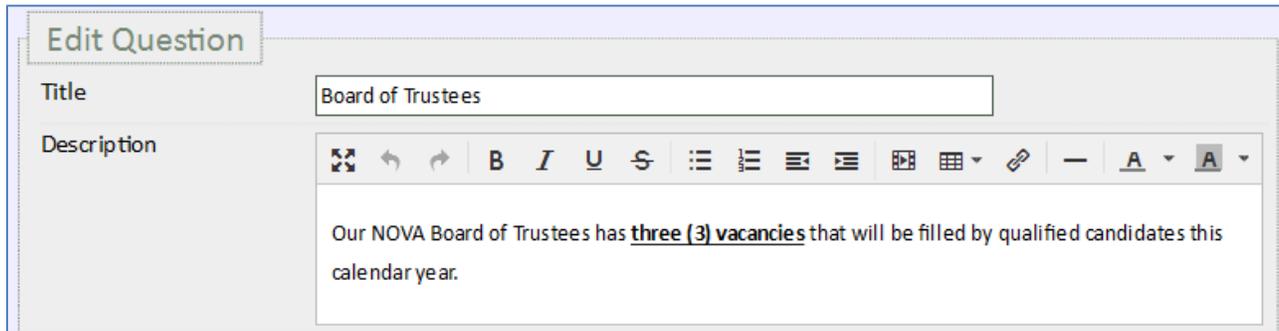
- ✦ In the **Questions** section you define the items or issues being voted upon. **Questions** represent individual topics on which your electors will vote.
- ✦ In the text field beneath the **New Question** header create a **Title** for your first question describing the topic (e.g. "Board of Trustees") and then click the **Create** button.

**New Question**

Title [?]

- ✦ After you've created a new question, click on its **Title** to manage the details and voting options associated with the question.
- ✦ Beneath the **Edit Question** header you now edit the **Title**, specify a **Description** (Optional), upload an **Image** (Optional). In the **Description** you can use formatting to add emphasis as desired.

## Part 4 continued: Managing Questions



**Edit Question**

Title: Board of Trustees

Description: Our NOVA Board of Trustees has three (3) vacancies that will be filled by qualified candidates this calendar year.

✦ **Description Formatting Tips:** Hover over a **Formatting Button** if you are unsure about its function. If you have a large amount of text, try using the “**Fullscreen**” button to make your setup easier.

✦ Now you must specify the **Type** of question and additional question details.

- **Plurality (most votes wins):** This is often used for candidate races or Yes/No questions, and this is your basic election ballot question type. It is the type of question that requires electors to “Select from the following options.”

For Plurality questions you may also select whether or not you would like to accept **Write-ins**. **Free Write-ins** allow electors to “type-in” a voting option in a free form text field. If **Free Write-ins** are enabled, Simply Voting standardizes any nuances in capitalization. Or you may select **Validated Write-ins** which checks a voter’s input against the names on the imported elector’s list, ensuring you do not receive any non-valid write-ins (e.g. King Kong). Write-ins are tabulated on the results section like any other results.

- **Preferential (rank each option):** This is often used for preference questions where electors must rank in order their preference for certain voting options.

For Preferential questions you must specify how **Voters Rank**, which defines how many of options must be ranked for a vote to be accepted. You can make it so voters need to rank...

- **All options**
- **Any number of options**
- **At least \_\_x\_\_ options**
- **Up to \_\_x\_\_ options**
- **Exactly \_\_x\_\_ options**
- **Between \_\_x\_\_ options and \_\_x\_\_ options**

Additionally for Preferential questions, you must also select the **Counting Method**, which determines how your results are calculated. The following **Counting Methods** are available:

## Part 4 continued: Managing Questions

- **Borda Count**
- **Single Transferable Vote / Hare-Clark / Instant Runoff Voting**
- **Condorcet Ranked Pairs / Tideman.**

For a more complete explanation of **Preferential** questions and possible **Counting Methods**, please login to your Simply Voting account and refer to the **Help Page** inside the **Election Manager**.

- **Comment Box:** This is often used for gathering freeform text responses to questions that require the elector to supply some form of information or text (e.g. “Additional comments” or “Please update your contact information” etc.). There is no limit on how much content an elector can supply for a Comments question. If **Abstain** is enabled, electors simply leave the text area blank if they do not wish to comment.
- **Info Box:** This is often used to group similar questions together, such as those relating to a particular office or position or perhaps a series of bylaw changes, or to simply to add descriptive or informative text somewhere on the ballot.

For instance, you could specify a header **Title** such as “Bylaws Section 1.0.2 Changes” and a **Description** that contained the proposed text of the Bylaws. Then you could create a series of questions all relating to changes in “Section 1.0.2” before adding in an additional **Info Box** for changes to another section.

- ⤴ For **Plurality** questions you must specify the number of options that **Voters Select**. Voters can select...
  - **Only one option**
  - **Up to \_\_x\_\_ options**
  - **Exactly \_\_x\_\_ options**
  - **Between \_\_x\_\_ options and \_\_x\_\_ options**

(e.g. If 3 vacancies are being filled on our Board of Trustees, you could specify electors must select between 2 options and 3 options, out of 6 total options).

- ⤴ For **Preferential** questions, you must specify **Number of Winners**, which defines how many voting options will be elected (e.g. If 3 vacancies are being filled on our Board of Trustees, the winners would be set to 3).
- ⤴ Moreover, for some questions you must also specify whether electors are allowed or disallowed to **Abstain**, and if they are allowed to do so, whether **Abstain** is listed as an explicit option.

You may also decide whether the Voting System’s default **Voting Instructions** are displayed to voters or whether you wish to write your own instructions in the **Description** field above.

## Part 4 continued: Managing Questions

**Edit Question**

Title: Board of Trustees

Description: Our NOVA Board of Trustees has **three (3) vacancies** that will be filled by qualified candidates this calendar year. Please review each candidate thoroughly before making final decisions.

Image [?]: Browse... No file selected.

Type:  Plurality (most votes wins) [?],  Preferential (rank each option) [?],  Comment Box [?],  Info Box [?]

Write-ins:  No Write-ins,  Free Write-ins (voters can type anything),  Validated Write-ins (must be an elector's name) [?]

Voters Select...:  Only one option,  Up to [ ] options,  Exactly [ ] options,  Between 2 options and 3 options

- ✦ For some questions you must specify the **Sorting of Options**, which defines how voting options are presented to electors when viewing the ballot. These sorting options include **Random**, **Alphanumeric**, or in a specific **Fixed Order**.
- ✦ Click **Save** after you've filled out the details of the question before proceeding onto **Question Options**.

Allow Voters to Abstain:  Yes,  Yes and list Abstain as an option,  No

Voting Instructions:  Display the default voting instructions [?]

Sorting of Options:  Random Order,  Alphanumeric Order,  Fixed Order

Buttons: Save, Cancel

- ✦ After you have created multiple **Questions**, you may adjust their order and placement on the election ballot. To do so, simply click on the **Reorder Questions** button located just below the **New Question** header, to enter reordering mode.

**New Question**

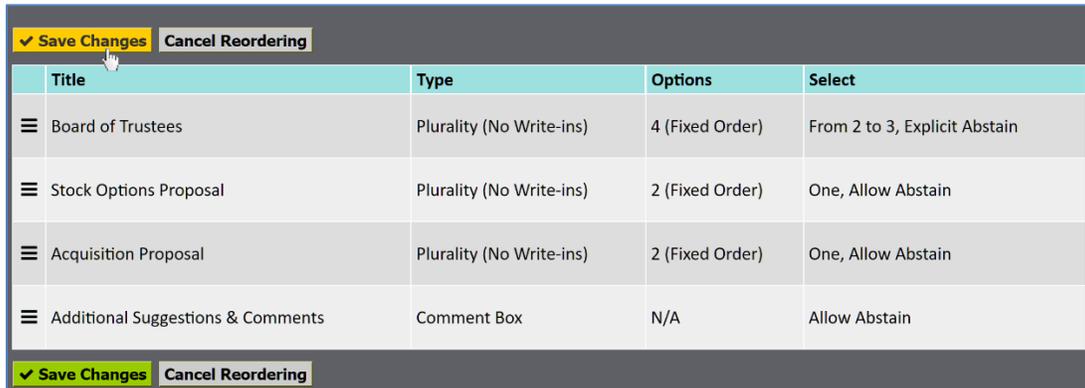
Title [?]: [ ]

**Reorder Questions**

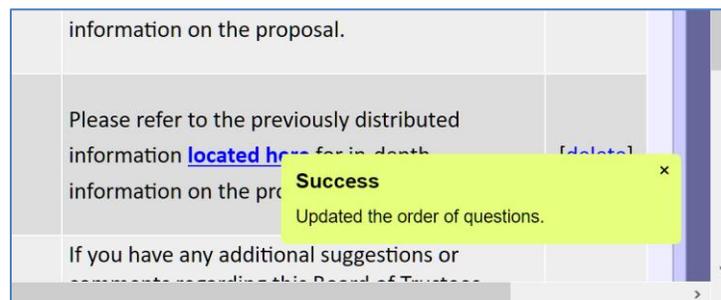
Title	Type	Options

## Part 4 continued: Managing Questions

- Once you are in reordering mode, you can click anywhere on a **Question** and then **drag and drop** them into a new order. Once finished, click the **Save Changes** button. A **Green Success Message** will briefly display in the *bottom right corner* of your screen.



Title	Type	Options	Select
Board of Trustees	Plurality (No Write-ins)	4 (Fixed Order)	From 2 to 3, Explicit Abstain
Stock Options Proposal	Plurality (No Write-ins)	2 (Fixed Order)	One, Allow Abstain
Acquisition Proposal	Plurality (No Write-ins)	2 (Fixed Order)	One, Allow Abstain
Additional Suggestions & Comments	Comment Box	N/A	Allow Abstain



- If you wish to exit the mode or to discard your order and return to the previously saved order, simply click the **Cancel Reordering** button.

## Part 5: Managing Question Options

- Options** are the candidates or options electors may select. There is no limit to the number of options.
- You can add options **manually** (*example below*) if you have a small amount, or you can **Import** from a **.CSV** file if you have a large amount of options or if you would like to upload simple descriptions with each option.
- To **manually add multiple options** at once, simply click the  button to create additional fields.

## Part 4 continued: Managing Questions

The screenshot shows the 'Add Options' form with a single input field labeled 'Option Name 1' containing the text 'Pauline Richardson'. A yellow '+' button is positioned to the right of the input field. Below the input field is a green 'Add' button. To the right of the 'Add' button is a button labeled 'Add Another Option'.

The screenshot shows the 'Add Options' form with four input fields labeled 'Option Name 1' through 'Option Name 4'. The input fields contain the names 'Pauline Richardson', 'Victor Mathis', 'Kelly Cruz', and 'Janie Owens' respectively. Each input field has a red trash can icon to its right. Below the input fields is a yellow 'Add' button. Below the 'Add' button is a button labeled 'Add Options'.

- ✦ To **delete unneeded fields before adding options**, simply click the button.
- ✦ Once you have specified the options you wish to add, simply click  the **Add** button.
- ✦ After you've created one or more options, click on an **Option Name** to manage and format the **Description**, and to upload an **Image** if necessary. **Save** as necessary.

The screenshot shows the 'Edit Option' form. The 'Option Name' field contains 'Kelly Cruz'. The 'Description' field contains a rich text editor with a toolbar and the following text:  
**Qualifications:**

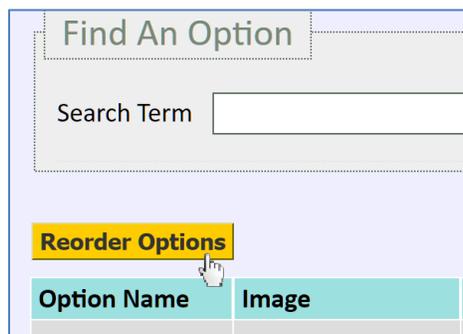
- NOVA - Asst. Fiscal Manager (2008-2010)
- NOVA - Chief Fiscal Manager (2011 - Present)

**Brief Statement:**  
My fiscal experience within NOVA has given me an insider's understanding of what direction NOVA must head.

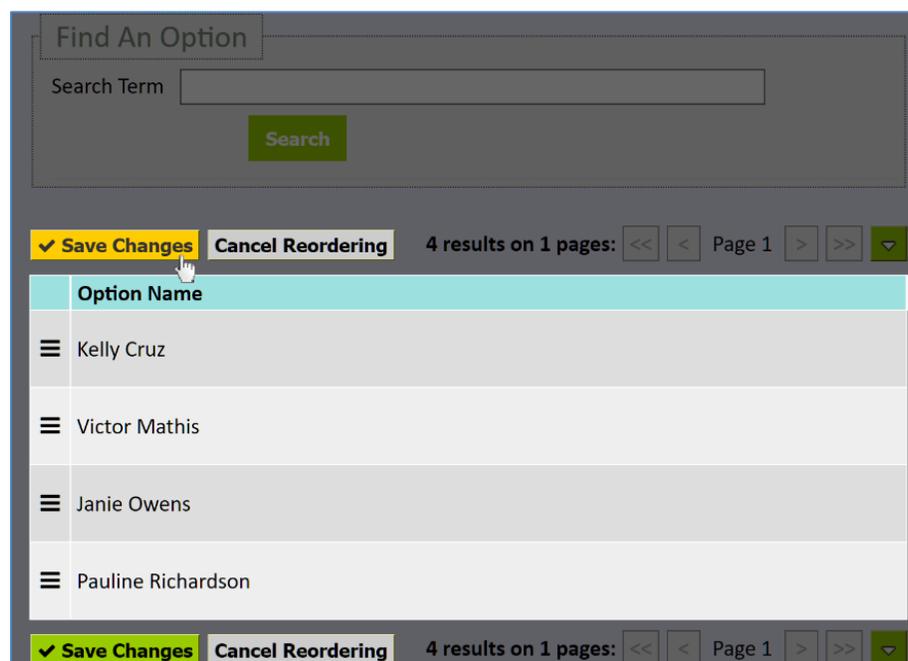
The 'Image [?]' field contains a 'Browse...' button and the text 'Kelly Cruz.png'. Below the form are two buttons: a yellow 'Save' button and an orange 'Cancel' button.

## Part 4 continued: Managing Questions

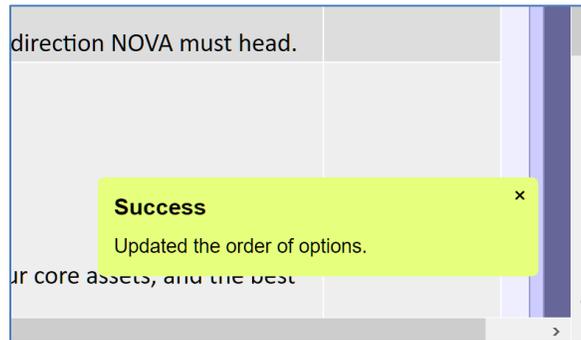
- ✦ **Description Formatting Tips:** Hover over a **Formatting Button** if you are unsure about its function. If you have a large amount of text, try using the “**Fullscreen**” button to make your setup easier.
- ✦ After you have created multiple **Options** and selected **Fixed Ordering**, you may adjust the order and placement of **Options** beneath the given Question. To do so, simply click on the **Reorder Options** button located just below the **Find an Option** search field, to enter reordering mode.



- ✦ Once you are in reordering mode, you can click anywhere on an **Option** and then **drag and drop** them into a new order. Once finished, click the **Save Changes** button. A **Green Success Message** will briefly display in the *bottom right corner* of your screen.



## Part 5 continued: Managing Question Options



- ✦ If you wish to exit the mode or to discard your order and return to the previously saved order, simply click the **Cancel Reordering** button

## Part 6: Previewing the Election

- ✦ Once you have finished managing your entire set of question **Options**, scroll back to the top of the screen and review your election by clicking on **Preview Questions**. **Preview Links** are also available in the **Election Overview** and **Finalize** sections as well.
- ✦ **Previews** will give you a sense of how an election will look and how electors can interact with it from your **Voting Website**.
- ✦ The **Preview URL** in your browser's address bar is unique to that **Election** and can be shared with other associates or colleagues via email. These other evaluators can access the **Preview URL** without having to access the Election Manager.

## Part 6 continued: Previewing the Election

**NOVA**  
Online Voting



[Home](#) [How It Works](#)

 **Preview Questions**  
This ballot is for viewing only and cannot be submitted. Please close the window when you are done.

**2012 General Election**

**Board of Trustees**



Our NOVA Board of Trustees has **three (3) vacancies** that will be filled by qualified candidates this calendar year.

This question is **optional**. You may select **from 2 up to 3** of the following.  
Click on any **view details** link to view more information.

**Kelly Cruz** [\[hide details\]](#)

**Qualifications:**

- NOVA - Asst. Fiscal Manager (2008-2010)
- NOVA - Chief Fiscal Manager (2011 - Present)



**Brief Statement:**  
My fiscal experience within NOVA has given me an insider's understanding of what direction NOVA must head.

**Janie Owens** [\[view details\]](#)

**Victor Mathis** [\[view details\]](#)

**Pauline Richardson** [\[view details\]](#)

**Abstain**

**Stock Options Proposal**

Please refer to the previously distributed information [located here](#) for in-depth information on the proposal.

This question is **optional**. You may select **one** of the following.

**Approve**

**Disapprove**

**Acquisition Proposal**

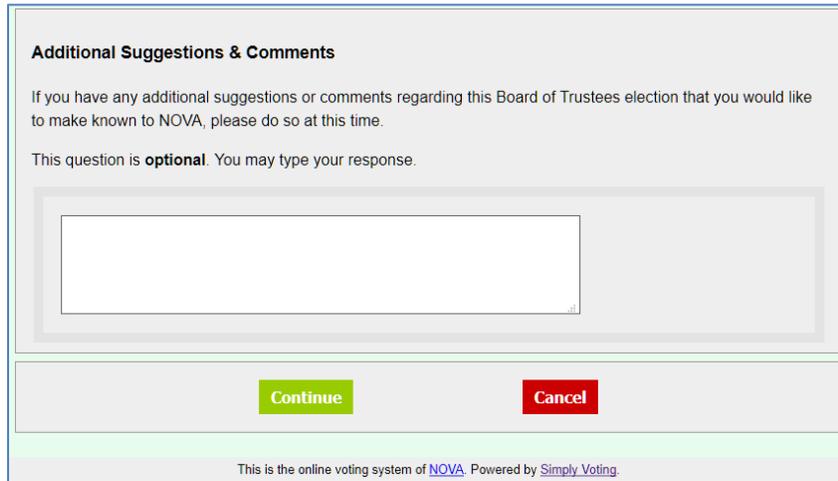
Please refer to the previously distributed information [located here](#) for in-depth information on the proposal.

This question is **optional**. You may select **one** of the following.

**Approve**

**Disapprove**

## Part 6 continued: Previewing the Election



**Additional Suggestions & Comments**

If you have any additional suggestions or comments regarding this Board of Trustees election that you would like to make known to NOVA, please do so at this time.

This question is **optional**. You may type your response.

This is the online voting system of [NOVA](#). Powered by [Simply Voting](#).

## Part 7: Customizing the Voting Website

- ✦ Once you have completed your election review, proceed to the **Settings** page to customize your **Voting Website's** color scheme, logo, and descriptive instructions text beneath the **Voting Website** header if you haven't yet already.
- ✦ Once finished, preview the look and feel of your **Voting Website** by clicking on the URL immediately below the **Account Details** header.



## Part 8: Finalizing the Election

- ✦ Once you have completed your election review and customizing the **Voting Website**, use the **yellow highlighted drop-down menu** to navigate to the **Finalize** section to complete a final check.
- ✦ You cannot **Finalize** your election until you pass all the final checks. If a **Fix** is required, you will see **[fix it]**. A common mistake is not using a future **Start Date** and **Start Time**.
- ✦ Once **Finalized**, your **Election's Status** will change from **Draft** to **Waiting** and your election will begin and end automatically at the time you specified earlier. You will also no longer be able to edit or change the election to protect the election's integrity, so if you find a mistake or need to alter the election after it has been **Finalized**, please contact [Support](#) from the Support page on our website.

## Part 8 continued: Finalizing the Election

- Once all checks are passed, you can **Preview** your election and proceed to check out. If you have previously purchased any **Single Election credits** that are applicable, such credits may be **used for finalization**, and if you have a current **Annual Plan** that is applicable, it can **used for finalization too**. If you expect to run multiple voting events but do not have an Annual Plan, please contact [Support](#) from the Support page on our website to learn more.

### Finalize

Once this election meets the criteria below, you may finalize it to allow voting to begin automatically on the start date. To preserve the integrity of the vote, you may not modify Election Details or Questions of a finalized election. Furthermore you may only make limited changes to the Electors. Double check that everything is set up correctly before proceeding!

**Election Details:** Start date is set to 2012-08-06 09:00:00 ✓

**Questions:** There are 4 questions ✓ [\[preview\]](#)

**Electors:** There are 183 electors ✓

#### Finalize Election

##### Use Single Election Credit

You have **1** Single Election Credit(s), each of which covers for up to **250** electors. Choosing this option will use **1** credit.

Use Credit

##### Purchase Single Election

Purchase a single election for **187** electors.

\$200.00 USD

Checkout

- After you've **Finalized** your election, the next step is usually **Sending** or **Scheduling** an **Email Blast**, as described in *Section Two: Waiting and Active Election Management*.



## Success

Election is finalized.

### Finalize

This election has been finalized. If you would like to send a mass email to electors when voting begins, now is a good time to [schedule a blast](#).

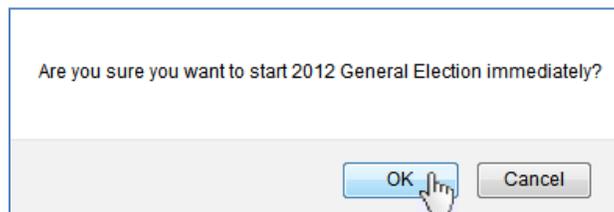
## Section Two: Waiting and Active Election Management

### Part 1: Starting or Ending an Election Early

- ✦ Election organizers may have varied reasons for why an election needs to be started or ended early. For instance, you may want to start an election early so electors do not have to wait until the previously specified date and time to cast their vote, or you may want to end an election early if you have reached a specific amount of voter turnout.
- ✦ To start or end an election early, login into your Simply Voting account. The first page you will see is the **Election Manager's "Elections"** page. Click on your election's **Election Name**. This will bring you to the **Election Overview** section.
- ✦ If the election has not yet started, next to the **Start Date** a **[start now]** link will appear. If the election has already started, next to the **End Date** an **[end now]** link will appear.



- ✦ In either starting or ending an election early, a **Confirmation Box** will pop-up asking if you are sure you want to perform this early action.



### Part 2: Changing an Election's Dates and Times

- ✦ Election organizers for varied reasons may have a desire to change an election's dates and times. For instance, perhaps to encourage greater turnout for a necessary quorum an election may extended, or perhaps an election may require a new end date to address unforeseen circumstances, or perhaps to correct previously incorrect data.
- ✦ If the election is **Waiting**, you may adjust both the **Start Date** and **Start Time**, as well as the **End Date** and **End Time**.

## Part 2 continued: Changing an Election's Dates and Times

- ✦ If the election is **Active**, you may adjust only the **End Date** and **End Time**.
- ✦ If the election is **Finished**, you may not reactivate or otherwise adjust an election's dates and times. However, if you do need to reactivate your election, please contact [Support](#) from the Support page on our website.
- ✦ To adjust the date and time of an election that has not yet started and is still **Waiting**, login into your Simply Voting account. The first page you will see is the **Election Manager's "Elections"** page. Click on your election's **Election Name** and navigate to the **Election Details** section.
- ✦ Beneath the **Edit Election** header you may adjust the **Start Date** and **Start Time** as well as the **End Date** and **End Time** as desired.

**Election Details**

Voting will automatically begin and end on the dates you choose.

**Edit Election**

Start Date	<input type="text" value="2012-08-13"/>	(YYYY-MM-DD)
Start Time	<input type="text" value="09:00"/>	(24:00 format)
End Date	<input type="text" value="2012-08-31"/>	(YYYY-MM-DD)
End Time	<input type="text" value="23:59"/>	(24:00 format)

- ✦ Keep in mind it may be a prudent to send an email blast to your electors letting them know about this change. Moreover, take care regarding the reloading of older email blasts where the now out-of-date information was previously used.
- ✦ For an **Active** election, you may adjust the **End Date** and **End Time** by simply navigating to the **Election Details** section.

Voting will automatically begin and end on the dates you choose.

**Edit Election**

End Date	<input type="text" value="2012-09-07"/>	(YYYY-MM-DD)
End Time	<input type="text" value="23:59"/>	(24:00 format)

- ✦ Keep in mind it may be a prudent to send an email blast to your electors letting them know about this change. Moreover, take care regarding the reloading of older email blasts where the now out-of-date information was previously used.

## Part 3: Sending Email Blasts to Electors

- ✦ Login into your Simply Voting account. The first screen you will see is the **Election Manager’s “Elections”** page. Click on the **Election Name** and use the **yellow highlighted drop-down menu** to navigate to the **Email Blast** section.
- ✦ You have three choices when choosing the recipients of your **Email Blasts**:
  - You may send an **Email Blast** to **All Electors** with a valid email address, often useful for sending out your first invitation and instructions.
  - Or you may send an **Email Blast** to **Electors that have not yet voted**, often useful for sending out reminders to increase voter turnout.
  - Or you may send an **Email Blast** to **Specific Electors**, often useful for resending invitations or reminders to individual electors with bounced email addresses that have been corrected, in addition to countless other possible reasons as well.

Always [Preview Body](#) before sending. You may save time by reloading the from, subject and body of any previous blast.

**New Email Blast**

[Reload most recent from, subject and body]

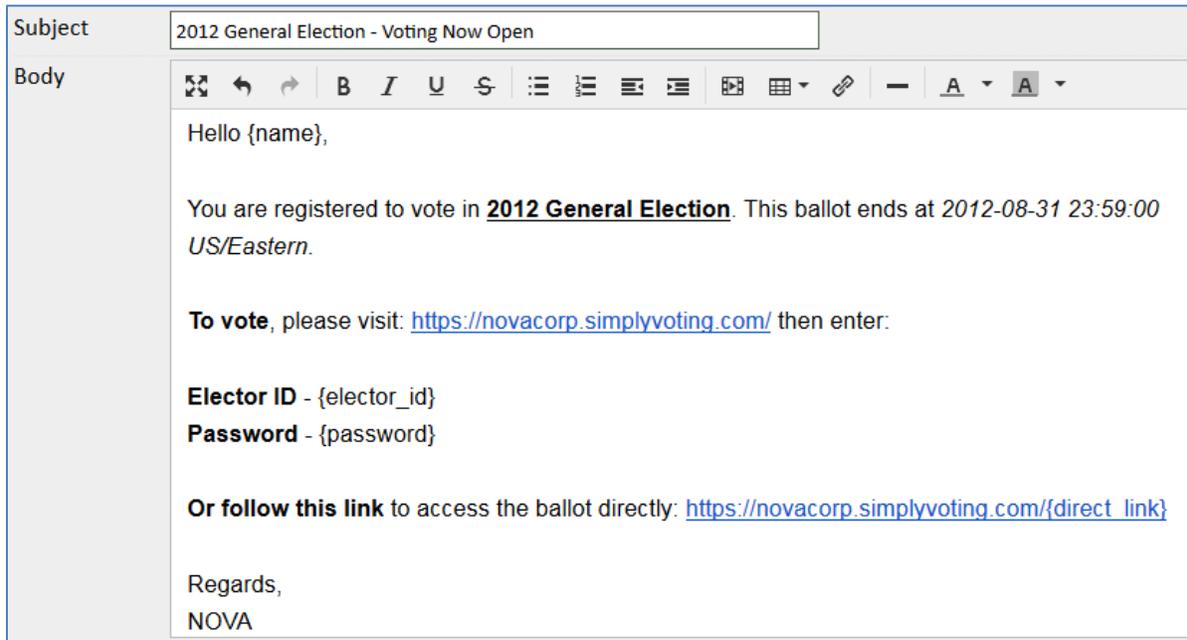
From  <vote@simplyvoting.com>

Note: replies will go to electionmanager@novacorp.com.

To  All electors (183 electors)  
 Electors that have not voted (183 electors)  
 Specific electors

- ✦ Once you have decided on the recipients of your email blast, specify who the message is **From**. You then specify the **Subject** and format the **Body** of the email message.
- ✦ Simply Voting provides you with a standard content template, but the **Body** of the email is a free form text field so you can add, remove, and format content as you would like.
- ✦ Note that you can also either **[Reload most recent from, subject and body]** to populate the specified fields with the last email blast you sent, or you may simply **[Reload]** a specified email blast from the **Email Blast History**. This comes in handy if you have varying messages you are sending to your voters.
- ✦ Items in **{Brackets}** indicate items of special code, which will be unique to each recipient, and the system will automatically fill in appropriate **{bracketed}** information as the emails are sent out to electors:
  - Use **{name}** to address your electors (*Elector ID is used if Name is unavailable*).
  - Use **{elector\_id}** and **{password}** to supply electors with their voting credentials.
  - Use **{direct\_link}** to allow electors to bypass logging in manually by allowing them to click on a unique securely encoded hyperlink in the message.

## Part 3 continued: Sending Email Blasts to Electors



The screenshot shows an email composition window. The subject line is "2012 General Election - Voting Now Open". The body of the email contains the following text:

Hello {name},

You are registered to vote in **2012 General Election**. This ballot ends at *2012-08-31 23:59:00 US/Eastern*.

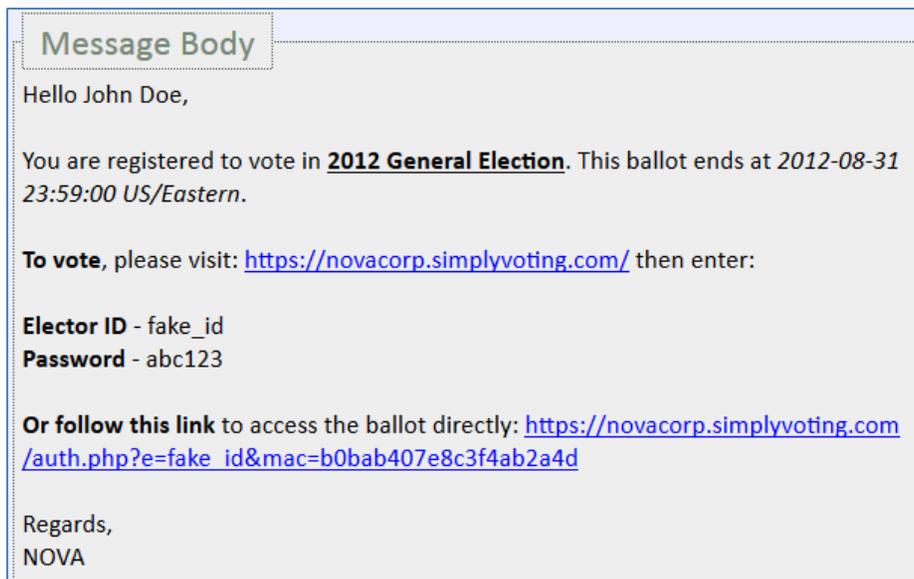
**To vote**, please visit: <https://novacorp.simplyvoting.com/> then enter:

**Elector ID** - {elector\_id}  
**Password** - {password}

**Or follow this link** to access the ballot directly: [https://novacorp.simplyvoting.com/{direct\\_link}](https://novacorp.simplyvoting.com/{direct_link})

Regards,  
NOVA

- Once you think you are satisfied with the **Body** of your message, can click on **Preview Body**, above the **New Email Blast** header, to see a **Sample Preview** to ensure that your **{unique code items in brackets}** are properly formatted and functioning correctly with *dummy placeholder elector data* from a "John Doe."



The screenshot shows a sample preview of an email message. The message body contains the following text:

Hello John Doe,

You are registered to vote in **2012 General Election**. This ballot ends at *2012-08-31 23:59:00 US/Eastern*.

**To vote**, please visit: <https://novacorp.simplyvoting.com/> then enter:

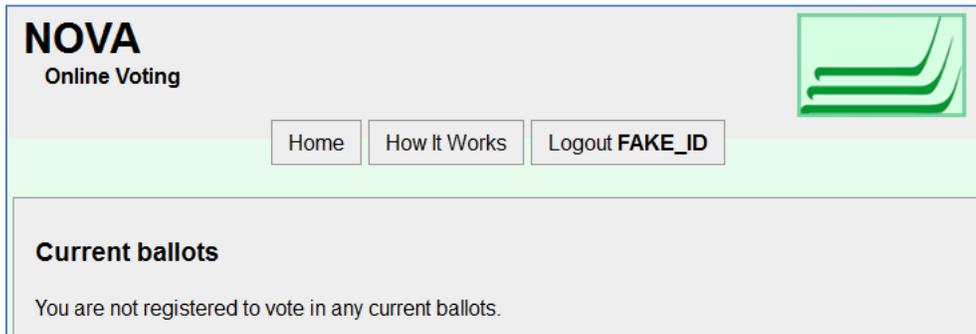
**Elector ID** - fake\_id  
**Password** - abc123

**Or follow this link** to access the ballot directly: [https://novacorp.simplyvoting.com/auth.php?e=fake\\_id&mac=b0bab407e8c3f4ab2a4d](https://novacorp.simplyvoting.com/auth.php?e=fake_id&mac=b0bab407e8c3f4ab2a4d)

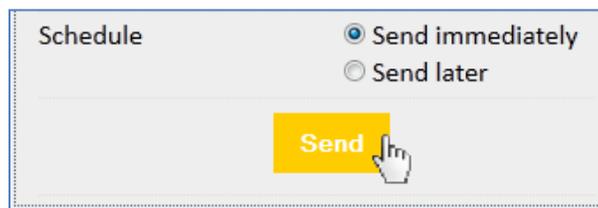
Regards,  
NOVA

- Moreover, if you are sending a **"direct link"** to electors, click on the direct link – you should login in as a dummy voter who is not registered to in any ballots, with **"FAKE\_ID"** in the Logout field. If you do not see this, you may need to reformat the URL, especially if you were copying and pasting the link. You will only see the below snapshot if you are using the direct link.

## Part 3 continued: Sending Email Blasts to Electors



- ✦ If your election is in **Waiting** or **Active** status, you can now **send an email blast immediately** to your electors, inviting them to vote in your election, and supplying them with their unique voting credentials and instructions, or you can opt to **send an email blast later**, at a specific date and time of your choosing.
- ✦ To **send an email blast immediately**, select the **Send immediately** button in below the email's **Body** in the **Schedule** section. Click **Send** when you are ready.



- ✦ After sending your message, a blue **Sending Email Blasts Message** will appear and your **Email Blast History** section will be updated with your new email blast.



### Sending Email Blasts

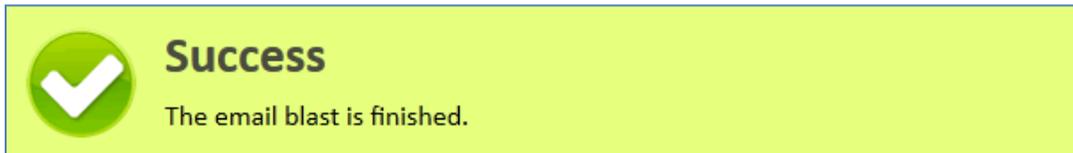
Email blast(s) are currently being processed. You do not have to keep this page open. An estimate of the total processing time for a blast is listed in the email blast history below. After a blast has completed it will have a status of finished in the email blast history below.

- ✦ For larger email blasts, as indicated in the **Email Blast History** section, **Processing Time** may take several minutes. You can always check on the **Status** of an email blasts to determine if the system is still processing it and sending out emails by looking to see if it is **Active** or **Finished**. For smaller email blasts, **Processing Time** may only take one minute. Note that the **Email Blast History** will *not* update while you are on the page, you must refresh your browser or navigate back to it to see an update on progress.
- ✦ Once your email blast is complete, the **Status** will be listed as **Finished**. To review any previously sent email blast content, you may click on the **[show body]** button in the **Action** column to reveal the formatted body of any message.

## Part 3 continued: Sending Email Blasts to Electors

Timestamp	Sent To	Sent From	Subject	Schedule	Status	Action
2012-08-07 10:23:46	All electors	NOVA	2012 General Election	Immediate	Finished	<a href="#">[show body]</a> <a href="#">[reload]</a>

- ✦ For email blasts with *10 or less electors*, **Processing Time** is essentially instantaneous and a green **Success Message** will appear.



- ✦ If an email blast is received by electors during the **Waiting** election period, and if any of these electors login, they'll see an **Upcoming Ballots** section displaying the names of any election ballots for which they are registered but which are not yet currently **Active**. If there are no **Upcoming Ballots** for an elector this section is hidden.

**Current ballots**  
You are not registered to vote in any current ballots.

---

**Upcoming ballots**  
You are registered to vote in the following ballots that have not yet started:

2012 General Election

---

**Past ballots**

[2011 Special Election](#) [Results](#)

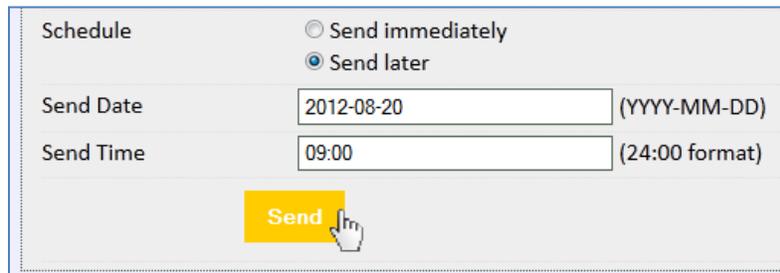
- ✦ Once any email blast is sent, the **Election Log** will contain logs regarding the specific email addresses that received the email blast. Additionally, information regarding email bounces is also logged as the information becomes available.

2012-08-07 10:23:46	Simply Voting	Email sent to mj@example.com	110534431
2012-08-07 10:23:46	Simply Voting	Email sent to adams.charlene@example.com	110559621
2012-08-07 10:23:46	Simply Voting	Email sent to Toshiro.K@example.com	110586244
2012-08-07 10:23:46	Simply Voting	Email sent to Greenstreet.Rick@example.com	110586735
2012-08-07 10:23:46	Simply Voting	Email sent to Florence.H@example.com	110598424
2012-08-07 10:23:46	Simply Voting	Email sent to deacons_miranda@example.com	110626721
2012-08-07 10:23:46	Simply Voting	Email sent to liam_riegel_mercer@example.com	110627991

2012-08-07 10:24:14	Simply Voting	Email bounced from janedoe@example.com	110723771
2012-08-07 10:24:17	Simply Voting	Email bounced from laura_johnson@example.com	110723892

## Part 4: Scheduling Email Blasts to Electors

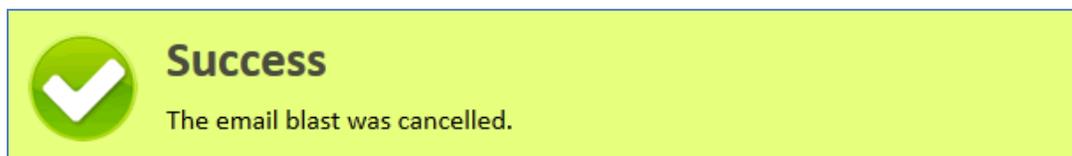
- ✦ To **send an email blast later**, select the **Send later** button in below the email's **Body** in the **Schedule** section. Fill out both the **Send Date** and the **Send Time** for your future **email blast**. The **Email Blast History** section will be updated with your new email blast.



- ✦ To **Cancel** a previously **Scheduled email blast**, simply click the **[cancel]** button for the appropriate message.

2012-08-17 15:00:13	Electors that haven't voted	NOVA	2012 General Election	2012-08-19 12:00:00	Waiting	<a href="#">[show body]</a> <a href="#">[reload]</a> <a href="#">[cancel]</a> 
------------------------	--------------------------------	------	-----------------------	------------------------	---------	---

- ✦ Once **Cancelled**, a green **Cancel Success Message** will appear and the email blast will be removed from the **Email Blast History**.



## Part 5: Managing Email Bounces

- ✦ After you have completed an **Email Blast** for the first time, you can keep a tab on any **Electors** that may not have received their email because their address does not exist due to inaccurate spelling, formatting, or because the address no longer is active.
- ✦ **Note:** Email Service Providers have varying timeframes for managing email bounces. The **Electors List** may be updated *instantaneously* for some providers, while taking *up to 72 hours* to be updated for other email service providers.
- ✦ To check for email bounces, use the **yellow highlighted drop-down menu** to navigate to the **Electors** section for your election. Scroll to the **Find An Elector** header and checkmark the box next to “**Display only electors with invalid emails**” and then click **Search**. You may also click on the title of the **Valid Email** column heading of the elector list to re-sort the list so electors with **Missing Emails** and **Invalid Emails** are displayed at the beginning.

## Part 5 continued: Managing Email Bounces

### Find An Elector

Search Term

Display only electors with invalid emails

2 results on 1 pages: << < Page 1 > >>

Electors ID	Name	Email Address	Valid Email	Voted	Action
<a href="#">110485233</a>	Philip Fry	philipfry@exxample.com	<input type="radio"/> <a href="#">[edit]</a>	<input type="radio"/>	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">110698762</a>	Yasha Adams	adama_yasha@example.com	<input type="radio"/> <a href="#">[edit]</a>	<input type="radio"/>	<a href="#">[show log]</a> <a href="#">[delete]</a>

- ✦ If you need to correct one or more emails you may **[edit]** the **elector's email address** to supply a corrected one.

### Edit Elector

Electors ID 110485233

Name [?]

Email Address [?]

- ✦ Once you have corrected bounced emails, you can **Resend an email blast** by navigating back to the **Email Blast** section. From there you can resend an email to each **Electors** you corrected by choosing to send an email blast to **Specific Electors**, or you can simply send a reminder email to all **Electors that have not voted**, and all electors with corrected email addresses will be automatically included in this larger email blast.

To

All electors (183 electors)

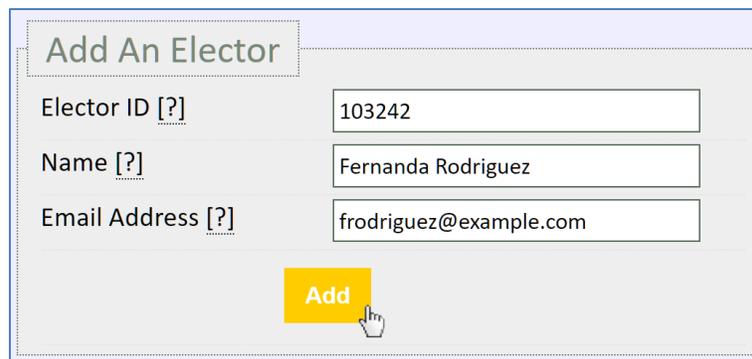
Electors that have not voted (84 electors)

Specific electors

Electors [?]

## Part 6: Additions, Deletions, and Editing Electors after Finalization

- ✦ From time to time, the list of **eligible electors** for any given election may need to be updated. New electors may have recently joined the organization, or perhaps were mistakenly left off the original list, or perhaps the original list has electors who are no longer eligible to vote and are in need of removal, or perhaps there are simply inaccuracies when it comes to elector data.
- ✦ To address these situations, election organizers have the ability to make a few adjustments after **Finalization** of an election. These include:
  - **Adding electors** manually one by one.
  - **Deleting electors** manually as long as they have not yet voted.
  - **Editing elector information**, such as updating email addresses or names.
- ✦ To **add electors**, in the **Electors** section simply fill out the elector's information beneath the **Add An Elector** header and click **Add**.



Add An Elector	
Elector ID [?]	103242
Name [?]	Fernanda Rodriguez
Email Address [?]	frodriguez@example.com
<b>Add</b>	

- ✦ Once the elector has been added, a green **Success Message** will appear.



- ✦ **Note:** If you need to **import** a larger number of electors, please contact [Support](#) from the Support page on our website.
- ✦ **Note:** New additions **do not** trigger any email blast automatically. You must either send or schedule a **specific electors** email blast for the new elector(s), or if you already plan to send or already have scheduled a reminder email blast for **electors who have not yet voted**, any new additions will receive their information through the reminder email blast.
- ✦ To **delete electors**, in the **Electors** section simply locate elector you wish to delete either using the **Find An Elector** search field or by manually searching the **Elector List**.
- ✦ Once the elector to be deleted is located, if the elector has not yet voted click on the **[delete]** link beneath the **Action** column.

## Part 6 continued: Additions, Deletions, and Editing Electors after Finalization

Elector ID	Name	Email Address	Valid Email	Voted	Action
<a href="#">10031613</a>	Neil Tyson	neil.tyson@example.com	✓	✗	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">10129436</a>	Remy Beck	remy.beck@example.com	✓	✓	<a href="#">[show log]</a>
<a href="#">10169089</a>	Bekah Orr	Bekah.orr@example.com	✓	✓	<a href="#">[show log]</a>
<a href="#">103242</a>	Fernanda Rodriguez	frodriguez@example.com	✓	✗	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">10120844</a>	Benny Mashall	mashall.benny@example.com	✓	✗	<a href="#">[show log]</a> <a href="#">[delete]</a>

- ✦ A **Confirmation Box** will pop-up asking if you are sure you want to perform this action.

Are you sure you want to delete elector 10120844 (Benny Mashall)?

- ✦ Once the elector has been deleted, a green **Success Message** will appear.



- ✦ To **edit electors**, in the **Electors** section simply locate elector you wish to edit either using the **Find An Elector** search field or by manually searching the **Elector List**.
- ✦ Once the elector to be edited is located, click on the **Elector ID** link beneath the **Elector ID** column.

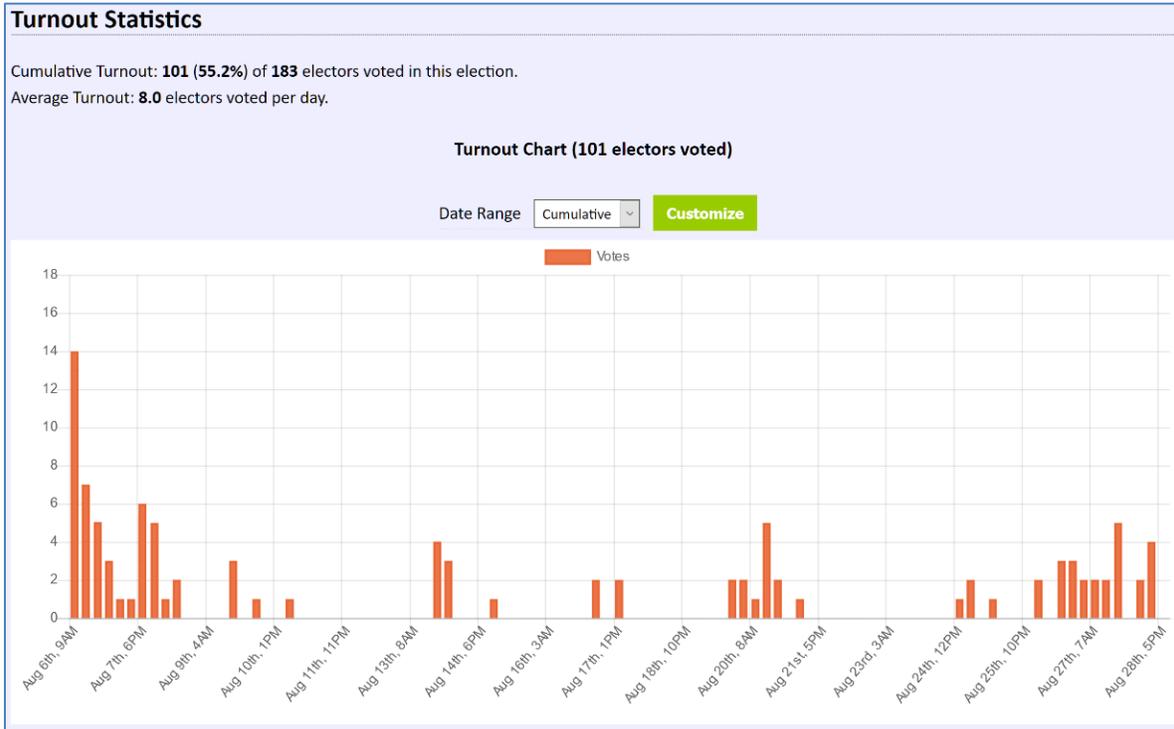
Elector ID	Name	Email Address	Valid Email	Voted	Action
<a href="#">10031613</a>	Neil Tyson	neil.tyson@example.com	✓	✗	<a href="#">[show log]</a> <a href="#">[delete]</a>
<a href="#">10129436</a>	Remy Beck	remy.beck@example.com	✓	✓	<a href="#">[show log]</a>
<a href="#">10169089</a>	Bekah Orr	Bekah.orr@example.com	✓	✓	<a href="#">[show log]</a>

- ✦ Update the elector's information as necessary. Once **Saved**, a green **Success Message** will appear.

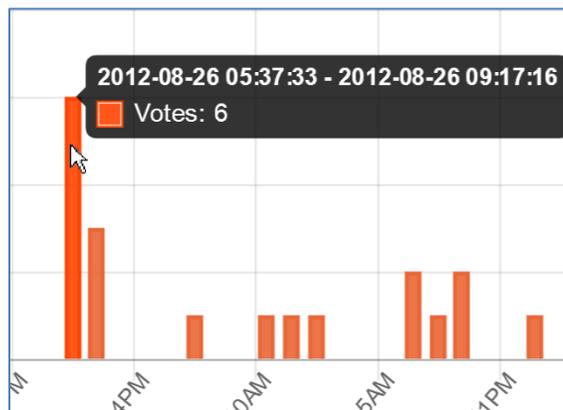


## Part 7: Checking Reports and Reviewing Elector Turnout

- ✦ To keep tabs on your *total elector turnout*, use the **yellow highlighted drop-down menu** to navigate to the **Reports** section. At the top of the page, from this report you can see the cumulative turnout of electors, the number of electors per day, in addition to a customizable **Turnout Chart**. Spikes in turnout often correspond to an email blast.



- ✦ Additionally, by hovering over any given turnout bar, you can find more specific information about that particular bar.



- ✦ At the bottom of the page, you will find the **downloadable reports**. By default a **Turnout by Country** report is available. Other reports may also be available, depending on any additional premium or enhanced features enabled.

## Part 7 continued: Checking Reports and Reviewing Elector Turnout

### Reports

Below is a list of reports that are available for your election.

Name	Action
Turnout By Country	<a href="#">[download]</a>

- ✦ To keep tabs on whether *individual electors* have voted, use the **yellow highlighted drop-down menu** to navigate to the **Electors** section.
- ✦ You can then use the **Find An Elector** search to determine whether an individual elector has or has not voted. You can also see a particular voter's activity with their ballot by clicking on **[show log]** in the **Action** column.

### Find An Elector

Search Term

Display only electors with invalid emails

[Search](#)

1 results on 1 pages: << < Page 1 > >>

Electors ID	Name	Email Address	Valid Email	Voted	Action
<a href="#">10129436</a>	Remy Beck	remy.beck@example.com	✓	✓	<a href="#">[show log]</a>

1 results on 1 pages: << < Page 1 > >>

[\[Download Electors CSV\]](#)

- ✦ You may also sort the **Electors** to organize and display which electors have voted or not by clicking on the **Voted** column heading, or alternatively **[Download Electors CSV]** to sort and organize data using a common spreadsheet software.

## Section Three: Post Election Management

### Part 1: Checking, Interpreting, and Publishing Results

- ✦ **Results** are immediately available for view and download upon the end of an election. To view results, login into your Simply Voting account. Use the **yellow highlighted drop-down menu** to navigate to the **Results** section.
- ✦ To download your results in a **.CSV** file to further organize or sort the results data in a common spreadsheet software, click on **[Download Raw Results CSV]**. Each row in the file is a voter.
- ✦ To download a certified results **.PDF** file with the entire summary of your results as it appears on the **Results** page, click **[Download Certified Results PDF]**.

## Part 1 continued: Checking, Interpreting, and Publishing Results

**Publish Results**

**Publish**

**Turnout:** 114 (62.3%) of 183 electors voted in this ballot.

**Board of Trustees**

Kelly Cruz	96 (23.8%)
Janie Owens	78 (28.2%)
Victor Mathis	66 (23.8%)
Pauline Richardson	37 (13.4%)

**VOTER SUMMARY**

Total	284
Abstain	7 (2.5%)

[\[Download Raw Results CSV\]](#) [\[Download Certified Results PDF\]](#)

- ✦ This sample election for *NOVA's Board of Trustees* has three winners, since three seats on the board are to be filled. *Kelly Cruz*, *Victor Mathis*, and *Janie Owens* were elected to the board as they received the three highest vote totals among all eligible candidates.
- ✦ To give your **Electors** access to the **Results**, you can **Publish** election results to your **Voting Website**. Once published, the results are made available to the public on your **Voting Website** and anyone will be able to view the results summary and verify the results by downloading a file containing votes and receipt numbers. You can always **Unpublish** election results at any time.

## Part 2: Checking Comments (if applicable)

- ✦ This sample election for *NOVA's Board of Trustees* also contained an optional comments box question. Voter comments by default are anonymous. To view **Comments**, use the **yellow highlighted drop-down menu** to navigate to the **Comments** section.
- ✦ To download any comments in a **.CSV** file to further organize or analyze the comment data in a common spreadsheet software, click on the **[Download Comments CSV]**.

## Part 2 continued: Checking Comments (if applicable)

4 results on 1 pages: << < Page 1 > >> ▼

Question	Comment
Additional Suggestions & Comments	I have been a part of NOVA for 35 years, and I really wanted to say that I think this is the best group of candidates for the Board of Trustees we've ever had. Any of these candidates will make excellent Trustees.
Additional Suggestions & Comments	I really feel that Victor Mathis is unqualified for this Trustee position.
Additional Suggestions & Comments	This is a great pool of candidates, and I really can't think of any other candidates that I would want on the Board of Trustees.
Additional Suggestions & Comments	For future elections, more in-depth information regarding each candidate's background would be helpful while casting a ballot.

4 results on 1 pages: << < Page 1 > >> ▼

[\[Download Comments CSV\]](#)

## Part 3: Checking Election Log

- ✦ The **Election Log** is an audit trail of all significant activity related to this **Election** and is often used for auditing purposes. Use the **yellow highlighted drop-down menu** to navigate to the **Election Log** section.
- ✦ To download your results in a **.CSV** file to further organize or sort the election activity log data in a common spreadsheet software, click on the **[Download Election Log CSV]**.

189 results on 2 pages: << < Page 2 > >> ▼

Timestamp ▲	IP Address ◅	Activity ◅	Elector ID ◅
2012-08-25 12:41:24	206.211.34.30 <a href="#">[ip lookup]</a>	Ballot filled	10112486
2012-08-25 12:41:29	206.211.34.30 <a href="#">[ip lookup]</a>	Internet vote	10112486
2012-08-25 12:49:18	66.87.131.227 <a href="#">[ip lookup]</a>	Ballot opened	1034487
2012-08-25 12:50:24	66.87.131.227 <a href="#">[ip lookup]</a>	Ballot filled	1034487
2012-08-25 12:50:43	12.85.100.266 <a href="#">[ip lookup]</a>	Internet vote	1062168
2012-08-25 13:00:19	16.21.88.12 <a href="#">[ip lookup]</a>	Scheduled an email blast	
2012-08-25 13:00:44	16.21.88.12 <a href="#">[ip lookup]</a>	Edited an elector	
2012-08-25 13:00:48	66.87.131.227 <a href="#">[ip lookup]</a>	Internet vote	1034487
2012-08-25 13:59:46	70.211.8.66 <a href="#">[ip lookup]</a>	Ballot opened	1031816
2012-08-25 14:00:19	70.211.8.66 <a href="#">[ip lookup]</a>	Ballot filled	1031816
2012-08-25 14:01:49	70.211.8.66 <a href="#">[ip lookup]</a>	Ballot opened	1031816
2012-08-25 14:02:05	70.211.8.66 <a href="#">[ip lookup]</a>	Ballot filled	1031816
2012-08-25 14:02:11	70.211.8.66 <a href="#">[ip lookup]</a>	Internet vote	1031816

## Section Four: Account Management

### Part 1: Managing Account Details and Security

- ✦ On the **Settings** page inside of the Election Manager tool, various items are available for account management.
- ✦ Beneath the **Account Details** section, it is important to ensure that the most up-to-date **Account Contact Person** and **Account Address** are completed, to ensure appropriate billing and customer support.

#### Account Details

Voting Website	<a href="https://novacorp.simplyvoting.com">https://novacorp.simplyvoting.com</a>
Annual Plan	No plan
Organization Name	<input type="text" value="NOVA"/>
Country	<input type="text" value="United States of America"/>
Address 1	<input type="text" value="123 Sample Street"/>
Address 2	<input type="text" value=""/> (optional)
City	<input type="text" value="Capital City"/>
State	<input type="text" value="District of Columbia"/>
Zip/Postal Code	<input type="text" value="20003"/>
Contact Name	<input type="text" value="Randall Stevens"/>
Contact Telephone	<input type="text" value="555-123-9876"/>
Contact Email	<input type="text" value="rstevens@example.com"/>
Time Zone	<input type="text" value="US/Eastern"/>
Bounce Notifications	<input checked="" type="checkbox"/> Receive email notifications when email blast messages bounce back

- ✦ In the **Account Security** section, you can manage your **Account's Current Password** as well as your **Account's Current Security Questions**.

#### Change Password

Current Password	<input type="text"/>
New Password [?]	<input type="text"/>
Confirm Password	<input type="text"/>

## Part 1 continued: Managing Account Details and Security

**Change Security Questions**

Current Password

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

**Save**

- ✦ Defining your **Security Questions** is necessary to reset your **Account's Password** if you later forget it, and to help maintain high security on your account.

## Part 2: Account Recovery

- ✦ If you have forgotten your **Voting Website** account name, on the [Election Manager's login page](#) you can **Recover** your account.
- ✦ To **Recover** your account's **Voting Website**, click the **recover account** link to begin the process.

**Welcome to the Election Manager**

To administrate your elections, please login with your organization's voting website and password.

**Login**

Voting Website .simplyvoting.com

Password

**Login**

Forgot your voting website? Please [recover](#) your account.

Forgot account your password? Please [reset](#) your password.

Problem logging in? Please contact our [support team](#).

Don't have an account? Please [sign up](#) instead.

## Part 2 continued: Account Recovery

**Account Recovery**

To retrieve your voting website, please enter the email address associated with your account.

**Recover Your Account**

Email

**Recover**

- ✦ Provide the email address associated with your account and click the **Recover** button. After clicking the button, a green **Success Message** will offer additional instructions.

 **Success**

An email containing your account details was sent to your email address. If you did not receive it within 5 minutes, it means that no account matching your email was found.

- ✦ The email you receive will list the **Voting Website(s)** with which your email address is associated so you can use it to login. However, if you also need to **reset your password**, proceed to *Part 3: Account Password Reset*.

## Part 3: Account Password Reset

- ✦ If you have forgotten your account **Password**, on the [Election Manager's login page](#) you can **Reset** your password.
- ✦ To **Reset** your account's password, you must know your **Voting Website**. Click the **reset password** link to begin the process.

**Welcome to the Election Manager**

To administrate your elections, please login with your organization's voting website and password.

**Login**

Voting Website

Password

**Login**

Forgot your voting website? Please [recover](#) your account.

Forgot account your password? Please [reset](#) your password.

Problem logging in? Please contact our [support team](#).

Don't have an account? Please [sign up](#) instead.

## Part 3 continued: Account Password Reset

### Password Reset

To reset your account password, please enter your organization's voting website.

#### Reset Your Password

Voting Website .simplyvoting.com

- ✦ Confirm your **Voting Website** in the field provided and click the **Reset** button.
- ✦ After clicking the **Reset** button, you will then be required to answer the account's **Security Questions**, or you will be prompted to contact our **Support** in order to complete your password reset request.
- ✦ If you answer the security questions incorrectly, you will be unable to proceed and should contact **Support** for further assistance. If you correctly answer said security questions, you will receive a green **Success Message** with further instructions.



### Success

An email containing instructions to reset your password was sent to your account's email address r\*\*\*\*\*s@example.com. If you did not receive it within 5 minutes, please contact our support team.

## Part 4: Accessing Billing History

- ✦ Your Simply Voting account contains your invoice purchase history. To access your billing history, log into your account and along the top menu click on the **Billing** page.
- ✦ Once there, you will find a listing of all **invoices** along with other pertinent information, like: *Status, Number, Issue Date, Due Date, Total and Currency*, and a link to *[pay online]* if applicable.

Status	Invoice No.	Issue Date	Due Date	Total	Action
Open	<a href="#">98424</a>	2019-04-07 08:22:25	2019-05-07	\$350.40 USD	<a href="#">[pay online]</a>
<b>Past Due</b>	<a href="#">98320</a>	2019-02-03 13:45:48	2019-03-04	\$775.20 USD	<a href="#">[pay online]</a>
<b>Paid</b>	<a href="#">98085</a>	2018-12-02 14:44:40	2019-01-01	\$883.60 USD	

## Part 4 continued: Accessing Billing History

- ✦ Invoices can have:
  - **Open** status, which indicates the invoice has not yet come due.
  - **Past Due** status, which indicates the invoice was not paid prior to its due date.
  - **Paid** status, which indicates that invoice has been successfully paid.
- ✦ For Single Election Credits or Annual Plans that are purchased self-service through the Voting System, such purchases generate **Paid** invoices and are available as receipts instantly.
- ✦ If Simply Voting staff manually create an invoice for Single Election Credit or an Annual Plan, or for any other additional Premium Features or Premium Services, such purchases generate **Open** invoices.
- ✦ For *some* **Open** and **Past Due** statuses, you may click on the **[pay online]** link to access an online payment page. Simply fill out the required information and click the **Process** button to complete your purchase via credit card. If you are unable to pay online, it may be due to the size of your purchase requiring a special processing fee. Customers *can always pay by check or bank wire* without additional credit card processing fees. Please contact [Support](#) if you have any questions.

**Invoice Payment**

Voting Website: [novacorp.simplyvoting.com](http://novacorp.simplyvoting.com)

Organization: NOVA Corp

Submit this form to pay for Invoice 98320. An email receipt will be sent to [rstevens@example.com](mailto:rstevens@example.com) upon payment.

Invoice Summary	
Item(s)	
System Fee: Single Election (1688 electors)	\$775.20
<b>Subtotal</b>	<b>\$775.20</b>
<b>Total (USD)</b>	<b>\$775.20</b>

**Pay Simply Voting Fee**

Credit Card Number



Expiration Date

CVC [?]



- ✦ Upon successful payment, you will receive a green **Success Message**.

**Payment Successful**

Transaction Id: **120919E3E-B4CF1679-4EC6-420C-A681-05B923BB111E**

Transaction Date/Time: **09/12/2019 11:23:09 AM**

Transaction Type: **SALE**

Approval Code: **414880**

Credit Card Number: **45\*\*\*\*\*1015 (VISA)**



## Part 4 continued: Accessing Billing History

- ✦ To access the details for any invoice purchase, simply click on the desired **Invoice No.** This generates a **.PDF** download with additional invoice information, as well as instructions on how to pay by check.

**Simply Voting**  
Simply Voting Inc.  
5160 Decarie Boulevard, Suite 502  
Montreal, QC H3X 2H9  
Canada  
Phone: 1 (800) 585-9694

**Invoice #98320**  
Issue date: 2019-02-03  
Due date: 2019-03-04  
Past Due

**To:** NOVA Corp  
123 Sample Street  
Sample Town, CA US 91523

Item Description	Qty	Unit Price (\$)	Total (\$)
System Fee: Single Election (1688 electors)	1	775.20	775.20

Payment due by **2019-03-04**. Please make all checks payable to Simply Voting Inc. and send by mail to the address above. For questions concerning this invoice contact [info@simplyvoting.com](mailto:info@simplyvoting.com).

Subtotal: \$775.20  
Total: \$775.20  
Balance Due (USD): \$775.20

GST/HST #836819938 - QST #1219819001

## Part 5: Managing Annual Elections Plan (if applicable)

- ✦ If you have a current **Annual Plan** for elections on your Simply Voting account, or if you have had a plan expire, you can **manage** your plan on the **Settings** page inside of the Election Manager tool, beneath the **Account Details** section.
- ✦ **Annual Plans** are designed for customers who run multiple voting events over the course of a year's time. Some customers may simply require an annual purchase of one **Single Election credit**, if only one yearly voting event is anticipated.
- ✦ Depending on how much time is remaining on your Annual Plan, you will have the option to either **[upgrade]** or **[renew]** your plan.

**Account Details**

Voting Website: <https://novacorp.simplyvoting.com>

Annual Plan: 250 electors, expires on 2020-01-15 20:00:00 **[upgrade]**

Organization Name: NOVA

Country: United States of America

**Account Details**

Voting Website: <https://novacorp.simplyvoting.com>

Annual Plan: 250 electors, expired on 2019-08-10 15:00:00 **[renew]**

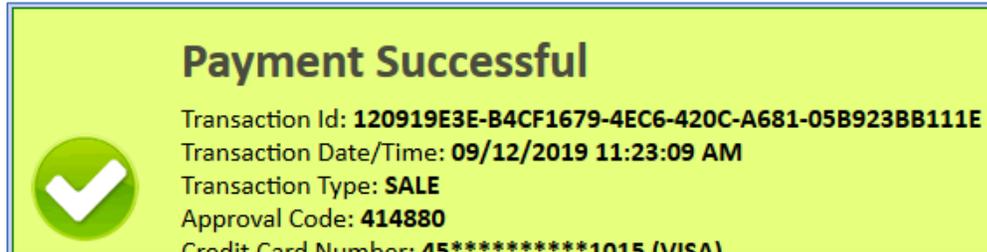
Organization Name: NOVA

Country: United States of America

- ✦ **Upgrading** allows you to add more elector capacity to your current existing plan through a purchase, so you can run elections with a larger electorate size. **Renewing** allows you to purchase a new annual plan, either for the same capacity of electors if desired, or for a new capacity of electors if more or less are needed.

## Part 5 continued: Managing Annual Elections Plan (if applicable)

- ✦ In either case, simply adjust your plan capacity as necessary, and proceed to checkout to complete your purchase via credit card. Once successful, you will receive a green **Success Message**.



- ✦ If you would rather pay by check or bank transfer, please contact us through our [Support Form](#) to **request an invoice**. If you have any questions about your **Annual Plan** or how to request a quote for one, or questions about **Single Election credits**, or other billing related matters, don't hesitate to get in touch with Simply Voting staff.

## Conclusion

This concludes our **Election Manager Guide**.

If you would rather avoid managing an election yourself or if you would rather trust it to online election experts, Simply Voting staff is happy to **Fully Manage** your election event as a **Premium Service**. If you would like to inquire about a Fully Managed election, or any of the items below, please contact us via the [Support Form](#) on our website or give us a call at **1 (800) 585-9694** during business hours.

Similarly, if you would like to inquire about any other **Premium Services**, get in touch with us as well! Other popularly available services include:

- ✦ Printing and mailing paper ballots, or voting instructions and passwords
- ✦ Collecting and processing paper ballots
- ✦ Telephone voting with professional voice recording
- ✦ Professional translations of voting interface language
- ✦ Customizations to the voting technology to fit your specific needs

Moreover, if you would like to inquire about any **Premium or Advanced Features**, get in touch with us once again! Other popularly available features include:

- |  |                                  |
|--|----------------------------------|
| ✦ Voter Segmentation                       | ✦ Paper Voting Support           |
| ✦ Weighted Voting Support                  | ✦ Non-Anonymous Voting           |
| ✦ Cumulative Voting Support                | ✦ Postal Mailing Address Support |
| ✦ Multiple Election Administrator Accounts | ✦ Second Secret Support          |

Thank you for using **Simply Voting**.



## Glossary

- **Account Log** – This log is a list of all successful Election Manager logins, as well as account password changes.
- **Active (Election Status)** – A period between the starting date and time and the ending date and time during which electors are able to cast their vote.
- **Active (Email Blast Status)** – A period when an email blast is currently being processed and sending emails out to eligible voters with valid emails.
- **Bounce Notifications** – If checkmarked in the Election Manager’s Setting page you will be notified when email blast messages bounce back as undeliverable.
- **Description** – An optional freeform text field available at the Election, Question, and Option levels. Typically instructive or informative text is placed within these fields to present electors with this information while they are completing their vote.
- **Candidate(s)** – See Options.
- **Certified Results .PDF** – A letter attesting to the validity of your election results, available for download on the Results page of any election.
- **Clone This Election** – A feature that allows election organizers to clone an existing election. This new Draft will have identical election details, questions, question options, and electors of the existing election. This is an excellent tool for running test elections.
- **.CSV (Comma Separated Value) File Format** – A file format that specifies data within the file must be separated by commas (or columns if you are using Excel) and on a new row for each complete data set. The first data set (column 1) is an Elector ID, the second data set (column 2) is a Name, the third data set (column 3) is an Email Address, the fourth data set (column 4) is a Password.

Additional data sets after Password may also be specified if Weighted Voting or Elector Segmentation is activated, or if mailing address fields are necessary.

This file format is used when importing electors into a election. This file format is also used when downloading the following files from the Election Manager: the list of Imported Electors, Results, Comments, the Activity Log, or the Login History.

- **Cumulative Voting** – Allows an election organizer to assign the number of shares or vote weight that may be specified for each eligible elector. Each eligible elector then can “divvy” or “split” their vote weight amongst various candidates or voting options as they see fit, up to their vote weight threshold.
- **Direct Vote Link** – Sent out using Simply Voting’s Email Blast feature, this is a link with unique authentication credentials encrypted into it for every elector, thus all any elector has to do is open their email and click on the link. They then will be automatically



authenticated and eligible to vote in any ongoing elections, bypassing the need to manually type in voting credentials.

- **Election** – Simply Voting uses the concept of an Election for any voting event. An election contains Questions and Question Options, in addition to a list of eligible Electors. Whether you are setting up a candidate vote or a by-law ratification, the same election architecture is used.
- **Election Manager** – This is the “back end” where election organizers may manage their pre-election setup or active and post-election management. Log into the Election Manager by clicking Login on Simply Voting’s homepage and authenticating with the proper credentials.
- **Elector ID** – A unique identifier for each elector, normally used for voter authentication. This is the primary identifier of an elector throughout the Election Manager.
- **Electors** – Any eligible participants in an election.
- **Email Blast** – Email blasts may be sent from the Email Blast section located within the desired election when logged into the Election Manager. You may send or schedule email blasts to all electors, those who have not yet voted, and to a list of specified electors. You may also send email blasts immediately, or schedule a certain date and time for when you would like an email blast sent to electors. Email Blasts are useful for sending voting credentials, such as Elector IDs and Passwords, as well as general information to eligible electors.
- **Finalize** – The final step in the pre-election setup process. At this step, you confirm starting date and time in addition to the ending date and time, the number of questions in your election, and the amount of electors in your election. Once finalize, you can no longer make edit changes to the election unless you get in touch with Simply Voting staff. To request a change or edit, please contact Support.

Once finalized, your election transitions into a Waiting stage until the start date and time occurs, at which point the election then transitions to an Active stage until the end date and time.

- **Fully Managed Election** – Simply Voting staff will take care of the pre-election setup, such as constructing your election and creating and importing the list of eligible electors. Simply Voting staff will also manage Email Blast sending and reporting on mid-election turnout, in addition to post-election results and any other opted for additional Premium Services. To inquire about purchasing this Premium Service, contact Support.
- **Kiosk** – Kiosk voting is often used for in-person or live event voting. A voting Kiosk may simply be a computer connected to the internet with a browser opened to a special Kiosk version of the Voting Website, available on the Settings page in the Election Manager. After a voter has confirmed and submitted their ballot, the voter is automatically logged out and the kiosk is ready for the next person.
- **Options / Question Options** – These are the options electors may select from while voting. Options may take the form of candidates running for an elected position, or



actions such as accepting or refusing a collective agreement, or something as simple as Yes and No or Approve and Disapprove.

- **Password** – A second identifier for each elector, used for voter authentication.
- **Plurality (Question Type)** – These are straightforward first-past-the-post races, whomever has the most votes wins. Plurality can be used for candidate races and Yes/No questions.
- **Preferential (Question Type)** – For these questions electors rank the options in order of preference. Votes are more expressive as electors can indicate their second preference, third preference, et cetera.

Three counting methods are available for preferential questions that affect how winners are selected: Borda Count; Single Transferable Vote / Hare-Clark / Instant Runoff Voting; and Condorcet Ranked Pairs / Tideman.

- **Question** – Simply Voting uses the concept of Questions for the components of an election that are voted on by voters. Questions can be actual questions (e.g. “Do you approve the by-law ratification?”) or they can simply be the title of positions or something similar (e.g. President; Board of Directors; Ratification).
- **Remote Authentication** – Configurable on the Settings page, beneath the Authentication Details section, these are alternative voter authentications options outside of Standard Authentication, where Simply Voting relies on connecting in real-time with an outside source, such as integrating with a customer’s existing authentication system on the customer’s servers.

Standard Authentication usually involves voting credentials stored in Simply Voting’s database, and often Simply Voting’s Email Blast feature is used to distribute some or all of an elector’s voting credentials.

The following remote authentications are possible:

- POP3 or IMAP server
- LDAP directory (bind using Elector ID)
- LDAP directory (use Elector ID to search for DN, then bind using DN)
- HTTP(S) Authentication
- Central Authentication Service (CAS)
- External website login
- Single sign-on (SSO)
- Shibboleth
- OpenID

- **Segment** – See Segmentation.
- **Segmentation** – Is a system that allows election organizers to restrict any question in the election to a segment of eligible electors. Often used for National vs. Regional voting, or voting on questions that may only be related to one “department” or “group” within an organization’s electorate, et cetera.

- 
- **Shareholder Voting** – See Weighted Voting.
  - **System Fees** – Simply Voting’s pricing is based on the number of eligible electors.
  - **User** – When opting for the “Multiple Administrators” Premium Feature, a user is any individual given access to all or portions of the Election Manager.
  - **Usergroup** -- When opting for the “Multiple Administrators” Premium Feature, usergroups indicate specially configured groups of “users” which may have certain restrictions on what elections and sections within elections that can be accessed in the Election Manager.
  - **Voter** – See Elector.
  - **Voter Verified Audit Trail (VVAT)** -- Once the electronic ballot has been cast a printable receipt is provided to assure voters that their votes have been recorded as intended. Should you opt to publish the final results, anyone will be able to download a file containing votes and receipt numbers and will then be able to audit their vote.
  - **Voting Website** – The unique customizable website to which your electors are directed so that they may authenticate themselves and complete their vote. *e.g. An organization named DEMO Corp. may have a Voting Website like: <https://demo.simplyvoting.com>.*
  - **Waiting (Election Status)** – An election that is not yet Active, and thus electors must wait until the starting date and time to cast their vote.

At this point, election organizers can also no longer perform edits on the election on their own, and must contact Simply Voting staff in order to make any changes.

- **Waiting (Email Blast Status)** – A period when an email blast is waiting to be processed due to a future date and time scheduled to send an email out to eligible voters with valid emails.
- **Weighted Voting** – Allows an election organizer to assign the number of shares or vote weight that may be specified for each eligible elector. Election results take the weight of each vote into account and tallies the total vote weights exercised. A variation of weighted voting is known as Cumulative Voting.