

EMS - Idox

File Export and Prep for Modern Polling

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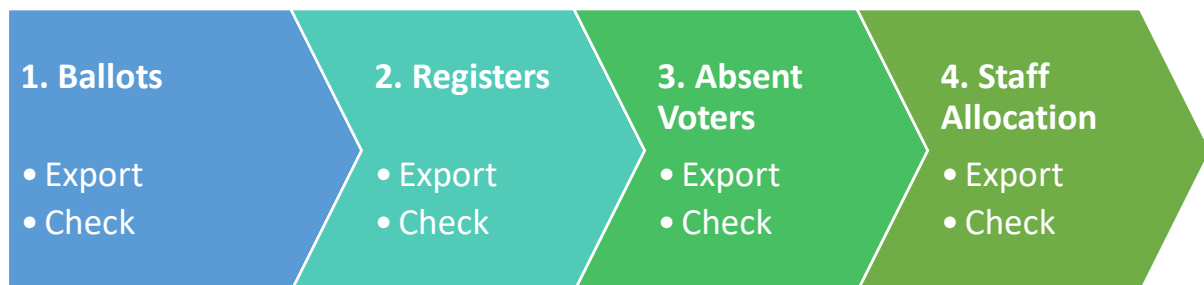
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Exporting files from your Election Management System (EMS)

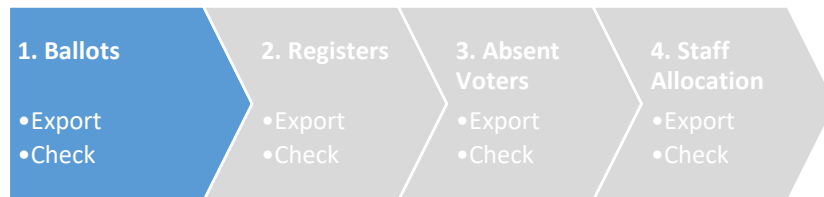
There are 4 file types to export from your EMS and upload the Modern Polling.

This document covers the following:

- the steps involved to export the files from your EMS
- what to check to ensure the files have exported correctly, and
- how to prepare those files, so that they can be uploaded to Modern Polling for your election.



1. Ballot Paper File



- The ballot file is typically the file used to send to the printer to print your ballot papers
- We expect each row to have an electoral area, election ref colour start and end range field.
- There **MUST BE** a Unique UIM/Range for each election and Polling Station
- There **MUST BE NO** blank or ZERO entries
- There **MUST BE NO** duplicates
- The file must be in CSV file format
- The file will be named: “**Ballot paper – file - <Election Name>_<Date/time of export>.CSV**”

Note: we do not require the candidate information for modern polling.

Export Instructions

1. If you don't already have the election selected, you'll need to do so before this feature will be available.
Navigate to the **Elections** tab | **Upcoming** screen
2. Locate the election you want to work with and click on the **Edit** button
3. In the **Elections** tab, navigate to **Export File**
4. Under sub-heading **Stationary**, select **Manage Ballot Books**
5. Click on **Ballot Paper Data Export** (If the screen is not populated, click Calculate Ballot Requirement, this will open a second window, where the details must be entered)
6. Eros Elections will generate the relevant .CSV files and will display the path in which the export has been saved

Check Export File(s)

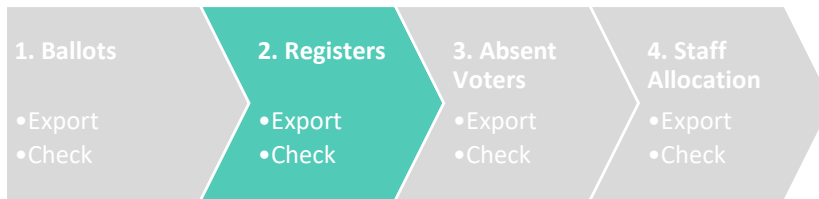
(41 Table Headings – expected)

Your exported data file will contain a lot of columns, however the ones required by Modern Polling are detailed below. Some applications e.g., MS Excel will alter the data when they are used to look at the fields, **DO NOT** click save after checking the fields.

1. Area Body Name (Level)
2. Electoral Area Name

3. Electoral Area Type
4. Election Date
5. Election Date 2
6. Station Number
7. Colour 1 (Ordinary)
8. Colour 1 B.P.UIM.Prefix
9. Colour 1 B.P. Start No.
10. Colour 1 B.P. Finish No.
11. Colour 1 UIM Start No.
12. Colour 1 UIM Finish No.
13. Colour 2 (Tendered)
14. Colour 2 B.P.UIM.Prefix
15. Colour 2 B.P. Start No.
16. Colour 2 B.P. Finish No.
17. Colour 2 UIM Start No.
18. Colour 2 UIM Finish No.
19. Area Code
20. Electorate for Area
21. No of AVs Issued for Area
22. No of Proxies Issued for Area
23. No of Vacancies for Area
24. Election Date (DD/MM/YYYY)
25. Election Level Code
26. Election Level Description
27. Officer Title
28. Officer Name
29. Election Title
30. Election Title 2
31. Election Ref
32. Election ID
33. Premise Name
34. UA Name
35. No of Ord Books
36. No of Tend Books
37. Station Letter
38. Station Text
39. Ballot Box No
40. Ballot Box Letter
41. Poll Station ID

2. Polling Station Register File



- This file is specifically designed for Modern Polling and will be enabled by Idox on request.
- The file will generate a **CSV** file format
- There will be one file for every Polling Station (unless your registers are combined in your EMS)
- We recommend numbering the polling stations.
However, letters can be used. The Polling Station name **MUST NOT** start with a space or special characters e.g. underscore, £, \$, ! &
- If there is more than one register file for a particular Polling Station, this indicates that multiple elections are being contested. A combined register file **MUST** be created.

Export Instructions

1. If you don't already have the election selected, do so now. Navigate to the **Elections** tab | **Upcoming** screen
2. Locate the election you want to work with and click on the **Edit** button
3. Now navigate to the **Elections** tab | under sub-heading **Stationary** | **Polling Station Registers** screen
4. For **Export as** select **CSV** as the desired format for the registers.
5. If your election is **combined**, please select **combined**, then Eros will output one file per Polling Station.
6. For **Empty properties** you must exclude the empty properties from your Polling Station Registers file. From the drop down, please select "**Do not print empty properties**".
7. Under **Select Stations**, place a tick against the stations that you want to export registers for. A **Select All** option is available in the top-left of this grid.
8. Click on the **Print for selected stations** button. Please be aware that this will start a store of proxy poll cards as well. This is to ensure that the registers are accurate and take any emergency proxies that you've processed into account.
9. As the process works, the Task Monitor in the top-right of the screen will report on progress. When the export is complete, a green message will appear at the top of the screen to confirm this. In the Task Monitor, you'll also be able to see the location of the export or copy the filepath for it.

- a. The data will be exported to the Halout\Live\Registers folder.

Check Exported File(s)

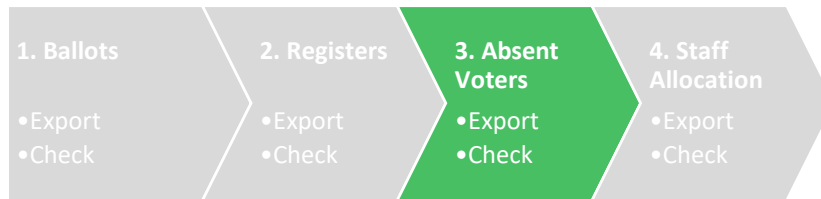
(56 Table Headings – expected)

Check that the data export file contains the fields detailed below. Some applications e.g., MS Excel will alter the data when they are used to look at the fields, **DO NOT** click save after checking the fields.

1. Elector ID
2. PD Code
3. ENO
4. Title
5. First Name
6. Initials
7. Surname
8. Suffix
9. Eligibility
10. Anonymous
11. Elector Flags
12. Franchise Flag
13. Absent Flag
14. Nationality
15. Date Of Birth
16. Date Of Attainment
17. Residing Address UPRN
18. Residing Address 1
19. Residing Address 2
20. Residing Address 3
21. Residing Address 4
22. Residing Address 5
23. Residing Address 6
24. Residing Address Postcode
25. Qualifying Address UPRN
26. Qualifying Address 1
27. Qualifying Address 2
28. Qualifying Address 3
29. Qualifying Address 4
30. Qualifying Address 5
31. Qualifying Address 6
32. Qualifying Address Postcode
33. Polling Station Name
34. Polling Station Number
35. Polling Station Address 1
36. Polling Station Address 2
37. Polling Station Address 3
38. Polling Station Address 4

39. Polling Station Address 5
40. Polling Station Postcode
41. Election Name
42. Election Date
43. Polling District
44. PD Name
45. Electoral Area Level(s)
46. Electoral Area Name(s)
47. Officer Name *(note: this will populate the Returning Officer's name in Reports)*
48. Officer Title
49. Authority Address 1
50. Authority Address 2
51. Authority Address 3
52. Authority Address 4
53. Authority Address 5
54. Authority Address 6
55. Authority Address 7
56. Authority Address 8

3. Absent Voter File (containing Proxies)



- This file will provide the details of your proxy voters
- The file contains the name and addresses of your Proxy Voters not all Absent voters.
- The file must be in **CSV** file format (this is the format that it is exported in by default, although it will be inside a password-protected .ZIP file)
- The file will be named: “**proxy poll card export <Export template name>_<Date/time of export>.csv**”

Export Instructions

1. If you don't already have the election selected, do so now. Navigate to the **Elections** tab | **Upcoming** screen
2. Locate the election you want to work with and click on the **Edit** button
3. Now navigate to the **Elections** tab | under sub-heading **Stationary | Poll Cards and Proxy Poll Cards** screen
4. Verify that you have stored your proxy poll cards
5. In the **Export Proxy Poll Cards** section:
 - a. Select the store dates and registers to export
 - b. Choose an appropriate export template (please untick password protection in the settings)
 - c. Enter the password that the data should be encrypted with (please note that this password will need removed before the secure upload to the Election Manager Portal)
 - d. Click on Export proxy poll cards
6. As the process works, the Task Monitor in the top-right of the screen will report on progress. When the export is complete, a green message will appear at the top of the screen to confirm this. In the Task Monitor, you'll also be able to see the location of the export or copy the filepath for it.
 - a. The data will be exported to the Halout\Live\Exports\ProxyPollCards folder

Check Exported File(s)

(108 Table Headings – expected)

Check that the data export file contains the fields detailed below. Some applications e.g., MS Excel will alter the data when they are used to look at the fields, **DO NOT** click save after checking the fields.

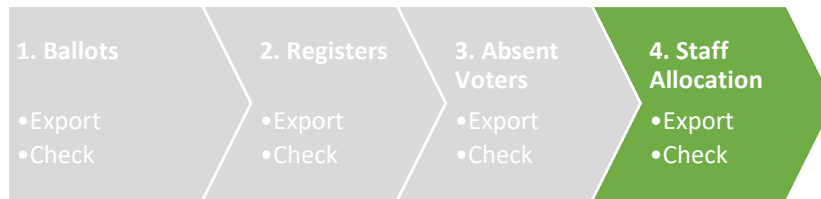
The output file should contain the following headings that Modern Democracy will use:

1. STATUS
2. MAIN_LA_CODE
3. OFFICE_LA_CODE
4. CANVASS_AREA
5. POLLING_DISTRICT
6. ENO
7. ELECTOR_ID
8. ELECTOR_TITLE
9. ELECTOR_FORENAME
10. ELECTOR_INITIALS
11. ELECTOR_SURNAME
12. ELECTOR_SUFFIX
13. ELECTOR_EMAIL
14. ELECTOR_ADDRESS_1
15. ELECTOR_ADDRESS_2
16. ELECTOR_ADDRESS_3
17. ELECTOR_ADDRESS_4
18. ELECTOR_ADDRESS_5
19. ELECTOR_POSTCODE
20. SEND_ADDRESS_1
21. SEND_ADDRESS_2
22. SEND_ADDRESS_3
23. SEND_ADDRESS_4
24. SEND_ADDRESS_5
25. SEND_POSTCODE
26. SEND_AWAY_ADDRESS
27. SEND_OVERSEAS
28. DECLARATION_TYPE
29. ANONYMOUS_ELECTOR
30. ABSENT_VOTE_TYPE
31. POSTAL_VOTE_ADDRESS_1
32. POSTAL_VOTE_ADDRESS_2
33. POSTAL_VOTE_ADDRESS_3
34. POSTAL_VOTE_ADDRESS_4
35. POSTAL_VOTE_ADDRESS_5
36. POSTAL_VOTE_POSTCODE
37. PROXY_NAME
38. VENUE_ID
39. STATION_ID
40. STATION_NUMBER
41. STATION_TEXT
42. STATION_LETTERS

43. VENUE_NAME
44. VENUE_NAME_LANG_2
45. VENUE_ADDRESS_1
46. VENUE_ADDRESS_2
47. VENUE_ADDRESS_3
48. VENUE_ADDRESS_4
49. VENUE_ADDRESS_5
50. VENUE_POSTCODE
51. VENUE_MAP_IMAGE
52. STATION_CHANGED
53. COMBINED_ELECTION_TITLE
54. COMBINED_ELECTION_TITLE_LANG_2
55. ELECTION_DATE
56. POLL_START_TIME
57. POLL_END_TIME
58. LAST_CANCELLATION_DATE
59. ELECTION_1_TITLE
60. ELECTION_1_TITLE_LANG_2
61. ELECTION_1_ELECTORAL_BODY
62. ELECTION_1_ELECTORAL_BODY_LANG_2
63. ELECTION_1_AREA_CODE
64. ELECTION_1_AREA_NAME
65. ELECTION_1_AREA_NAME_LANG_2
66. ELECTION_1_AREA_TYPE
67. ELECTION_1_CONTESTED
68. ELECTION_1_VACANCIES
69. ELECTION_2_TITLE
70. ELECTION_2_TITLE_LANG_2
71. ELECTION_2_ELECTORAL_BODY
72. ELECTION_2_ELECTORAL_BODY_LANG_2
73. ELECTION_2_AREA_CODE
74. ELECTION_2_AREA_NAME
75. ELECTION_2_AREA_NAME_LANG_2
76. ELECTION_2_AREA_TYPE
77. ELECTION_2_CONTESTED
78. ELECTION_2_VACANCIES
79. ELECTION_3_TITLE
80. ELECTION_3_TITLE_LANG_2
81. ELECTION_3_ELECTORAL_BODY
82. ELECTION_3_ELECTORAL_BODY_LANG_2
83. ELECTION_3_AREA_CODE
84. ELECTION_3_AREA_NAME
85. ELECTION_3_AREA_NAME_LANG_2
86. ELECTION_3_AREA_TYPE
87. ELECTION_3_CONTESTED
88. ELECTION_3_VACANCIES
89. ELECTION_4_TITLE
90. ELECTION_4_TITLE_LANG_2
91. ELECTION_4_ELECTORAL_BODY
92. ELECTION_4_ELECTORAL_BODY_LANG_2
93. ELECTION_4_AREA_CODE

- 94. ELECTION_4_AREA_NAME
- 95. ELECTION_4_AREA_NAME_LANG_2
- 96. ELECTION_4_AREA_TYPE
- 97. ELECTION_4_CONTESTED
- 98. ELECTION_4_VACANCIES
- 99. ELECTION_5_TITLE
- 100. ELECTION_5_TITLE_LANG_2
- 101. ELECTION_5_ELECTORAL_BODY
- 102. ELECTION_5_ELECTORAL_BODY_LANG_2
- 103. ELECTION_5_AREA_CODE
- 104. ELECTION_5_AREA_NAME
- 105. ELECTION_5_AREA_NAME_LANG_2
- 106. ELECTION_5_AREA_TYPE
- 107. ELECTION_5_CONTESTED
- 108. ELECTION_5_VACANCIES

4. Staff Allocation File



- There **MUST BE** a unique Mobile number for each staff member
- The Mobile number should start with **07** and contain **11 digits**
- The file must be in **CSV** file format (this is the format that it is exported in by default, although it will be inside a password-protected .ZIP file)
- The file will be named: **StaffAppointmentExport-<Election Name>_<Date/time of exprt>.csv**

Export Instructions

1. If you don't already have the election selected, you'll need to do so before this feature will be available. Navigate to the **Elections** tab | **Upcoming** screen.
2. Locate the election you want to work with and click on the **Edit** button
3. Now navigate to the **Elections | Export/Import File** screen | **Export files**
4. Click on the **Staff Data Export** button
5. Enter a password for the export, then click on **Save**
6. When the export is complete, the location of the file will be displayed on the screen

Check Exported File(s)

(11 Table Headings – expected)

Check that the data export file contains the fields detailed below. Some applications e.g., MS Excel will alter the data when they are used to look at the fields, **DO NOT** click save after checking the fields.

The output file should contain the following headings;

1. Date
2. Station Type
3. Station Number
4. First Name
5. Last Name
6. Mobile Number

7. Staff ID
8. Job Code
9. Job Description
10. Station Letters
11. Station ID

Pre-preparation for Data & Election Creation

for use in Modern Polling

Data Upload Preparation Instructions

Prior to the Data Upload session, it is recommended that the required Election Management System (EMS) data files are exported and ready for upload into Modern Polling. This document provides instructions on how to create the data files Modern Polling requires and get prepared for the data upload session.

There are 5 steps:



Step 1: Create Folder Structure

The first step is to setup a folder structure on your desktop or laptop to save or copy the required Election data files when they are exported from the EMS:

1. Create a folder called MDL Data
2. Create 4 sub folders
 - 2.1. Folder 1 called **Ballot Allocation**
 - 2.2. Folder 2 called **Polling Station Registers**
 - 2.3. Folder 3 called **Absent Voters**
 - 2.4. Folder 4 called **Staff Allocation**



Step 2: Export the Data Files from your EMS

There are 4 file types to Export:

File Type	Export Steps
1. Ballot Allocation	From the Elections Portal, click on the Elections Tab, and select Export Files. Use the “Ballot Paper Data Export” option. Upload the “Ballot paper - book and paper numbers” data file that is generated
2. Polling Station Registers	From the Elections Portal, click on the Elections Tab, and select Polling Station Registers. In the Export As field select “CSV only” and in the Empty Properties field select “Do Not Print Empty Properties”. Select all the Polling Stations using the tick boxes and click “Print for selected stations” button at the top
3. Absent Voter (Containing Proxies)	From the Elections Portal, click on the Elections Tab, and select Poll Card and Proxy Poll Cards. Ensure that you perform a final Poll Card Store. Then use the Export Proxy Poll Cards option at the bottom (selecting all store dates) to export your proxy voters data
4. Staff Allocation	From the Elections Portal, click on the Elections Tab, and select Export Files. Use the “Staff Data Export” option



Step 3: Prepare Data Files for Upload

1. Copy the Ballot Allocation file(s) In the Ballot Allocation folder.
2. Copy all the Polling Station Register files to the Polling Station Registers folder
 - There should be a register for each Polling Station
 - Remove any other files that the EMS may create in the export e.g. .meta file types.
3. Copy the Absent Voter file(s) in the Absent Voter folder.
4. Copy the Staff Allocation file into the Staff Allocation folder.
5. If any file fails, please **DO NOT** try to upload again, contact your project manager



Step 4: Upload Data Files and Create Election

Create Election / Upload Ballot Paper

1. Log into the **Modern Polling Portal** in Google Chrome
2. Click **Create Election**
3. Click the **down arrow** in the '**Choose a date**' field to select the date for your election
4. In the '**Ballot Paper File(s)**' click **Add Files**
Note: you only upload your ballot file(s) once for your election, during the Minus 19 upload. Please ensure it is correct before uploading.
5. Click on the '**Drag and drop files here**'
 Navigate and **select the file(s)** you exported from your EMS.
 (Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')
6. Once validated, '**Validated**' is displayed under '**Import Status**'
7. Under '**Election(s)**' the name(s) for your election(s) are displayed on the left – these are extracted from your ballot file(s). Please do not rename (it will cause errors when validating).
 On the right the '**Type**' dropdown menu(s) are displayed for your election(s). There are several options, each corresponding to an election format from your jurisdiction. Ensure you select the correct type of election to match the election name.
8. Click **Create**
 (Batch Drop: date and time is displayed and '**No issues detected**')
9. Click **Import**
 (Batch Drop: will have a 'blue' loading icon – this can take a few minutes)
10. A message '**Election(s) > The ballots have been successfully imported**' is displayed.
 Click **Next**
11. The '**Home**' screen is displayed.
 The election(s) and stats are displayed, as well as the number of polling stations and ballot ranges for those stations.
Note: the Polling Station details are not populated. Once the polling station registers (next step) are uploaded these will populate.
12. Click on **Upload** in the main menu (in the header)
 You can see your '**BALLOT PAPER**' file has been uploaded and cannot be re-uploaded.

Upload Polling Station Registers

13. Under '**POLLING STATION REGISTERS**', click **Add Files**
14. Click on the '**Drag and drop files here**'
Navigate and **select the file(s)** you exported from your EMS.
(Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')
15. '**No issues detected**' is displayed, click **Upload**.
(Batch Drop: will have a 'blue' loading icon – this can take a few minutes. The **Import Status** will display '**Importing...**'
16. Once successful, '**No issues detected**' is displayed.
Import Status has a green tick for Success.
17. A warning message is displayed as a reminder to '**Please upload an updated absent voter file now**', which is the next step.

Upload Absent Voter List

18. Under '**ABSENT VOTER LIST**', click **Add Files**
19. Click on the '**Drag and drop files here**'
Navigate and **select the file(s)** you exported from your EMS.
(Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')
20. '**No issues detected**' is displayed, click **Upload**.
(Batch Drop: will have a 'blue' loading icon – this can take a few minutes. The **Import Status** will display '**Importing...**'
21. Once successful, '**No issues detected**' is displayed.
Import Status has a green tick for Success.

Validation may highlight warnings or errors. You cannot proceed with errors, as these are critical to your election. You can proceed with warnings, although we recommend you first check your data as these are potential concerns.

Now that the Proxies have been uploaded, the step to upload a **Staff Allocation File** is next.

DO NOT Upload Staff Allocation – until Minus 5

NOTE: you will not upload your Staff Allocation file(s) until Minus 5

PLEASE CHECK YOUR DATA IS CORRECT this is the data that will be downloaded onto the iPads in the polling station(s).

Navigate to the '**Home**' screen.

Check all your election stats, polling stations and the details for each.



Minus 5 (final) Data File Upload

It is important to repeat the process for the **final Register Upload (Minus 5 data) as updated Registers and proxy files** are required to ensure that all elector and proxy details are available in Modern Polling on Election Day. Please be sure to name the files, so they are not confused with the Minus 19 data upload.

Upload Polling Station Registers

22. Under '**POLLING STATION REGISTERS**', click **Add Files**
23. Click on the '**Drag and drop files here**'
Navigate and **select the file(s)** you exported from your EMS.
(Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')
24. '**No issues detected**' is displayed, click **Upload**.
(Batch Drop: will have a 'blue' loading icon – this can take a few minutes. The **Import Status** will display '**Importing...**'
25. Once successful, '**No issues detected**' is displayed.
Import Status has a green tick for Success.
26. A warning message is displayed as a reminder to '**Please upload an updated absent voter file now**', which is the next step.

Upload Absent Voter List

27. Under '**ABSENT VOTER LIST**', click **Add Files**
28. Click on the '**Drag and drop files here**'
Navigate and **select the file(s)** you exported from your EMS.
(Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')
29. '**No issues detected**' is displayed, click **Upload**.
(Batch Drop: will have a 'blue' loading icon – this can take a few minutes. The **Import Status** will display '**Importing...**'
30. Once successful, '**No issues detected**' is displayed.
Import Status has a green tick for Success.

Validation may highlight warnings or errors. You cannot proceed with errors, as these are critical to your election. You can proceed with warnings, although we recommend you first check your data as these are potential concerns.

Now that the Proxies have been uploaded, the step to upload a **Staff Allocation File** is next.

Upload Staff Allocation

31. Under '**STAFF ALLOCATION**', click **Add Files**
32. Click on the '**Drag and drop files here**'
Navigate and **select the file(s)** you exported from your EMS.
(Batch Drop: will have a 'blue' loading icon and '**Validating**' is displayed under '**Import Status**')

33. **'No issues detected'** is displayed, click **Upload**.
(Batch Drop: will have a 'blue' loading icon – this can take a few minutes. The **Import Status** will display **'Importing...'**)
34. Once successful, **'No issues detected'** is displayed.
Import Status has a green tick for Success.

PLEASE CHECK YOUR DATA IS CORRECT this is the data that will be downloaded onto the iPads in the polling station(s).

Navigate to the 'Home' screen.

View all of your election stats, polling stations and the details for each.