

# EMS-Xpress

File Export and Prep for Modern Polling

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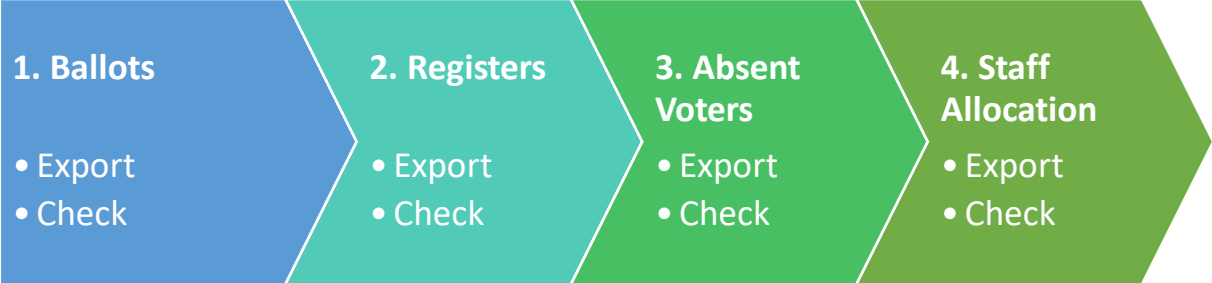
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# Exporting files from your Election Management System (EMS)

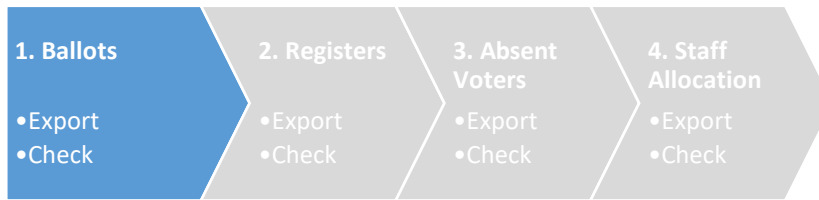
There are 4 file types to export from your EMS and upload the Modern Polling.

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(s)



- 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 should be called **BallotPaperAnalysis.TSV**  
**Note: file type MUST be TSV**

### Export Instructions

In Xpress Management

1. Click on **Areas** on the sidebar
2. Ensure that **all Issues are selected** on the top screen.
3. Choose **Documents**
4. Choose **Polling Station Documents**
5. Choose **Ballot Papers**  
**Note: do not edit the electoral area name (i.e. AreaName)**
6. Export the option called **'Ballot Paper Analysis (Export – Modern Democracy)'**  
**Note: Enhanced ballot paper numbering must be used.**
7. Copy the file to the **Modern Polling Data/Ballot Book Folder**

### Check Exported File(s)

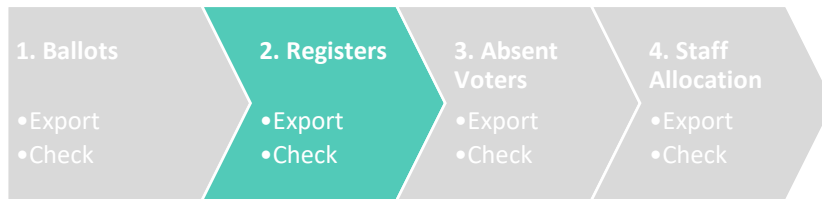
(40 Table Headings – expected)

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. ElectionDate
2. ElectionDescription
3. TypeDescription  
**Note: Forward slashes are not accepted, only hyphens.**
4. AreaName
5. PollingStationNumber

6. PollingPlaceName
7. PollingPlaceAddress1
8. PollingPlaceAddress2
9. PollingPlaceAddress3
10. PollingPlaceAddress4
11. PollingPlaceAddress5
12. PollingPlacePostCode
13. PostalColour
14. PostalBookSize
15. AreaPostalStart
16. AreaPostalEnd
17. OrdinaryColour
18. OrdinaryBookSize
19. OrdinaryStart
20. OrdinaryEnd
21. TenderedColour
22. TenderedBookSize
23. TenderedStart
24. TenderedEnd
25. sysPSAreaElectorCount
26. ElectionId
27. ElectionTypeId
28. ElectionAreaId
29. PSId
30. UseBPRanges
31. OverseasEarlyPostalColour
32. OverseasEarlyPostalBookSize
33. OverseasEarlyPostalStart
34. OverseasEarlyPostalEnd
35. LostSpoiltColour
36. LostSpoiltBookSize
37. LostSpoiltStart
38. LostSpoiltEnd
39. UIM
40. BPPrefix

## 2. Polling Station Register File(s)



- This file is specifically designed for Modern Polling
- 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

In Xpress Management:

1. Click on **Elections** in the sidebar
2. Ensure that **all Issues are selected** on the top screen.
3. Click the **Actions** tab at the bottom centre of the screen
4. Within the list, look for the option **'Export Polling Station Registers'**
5. Right click on **'Export Polling Station Registers'** and click **'Run Action'**
6. Click **Yes** within the pop-up window to export the file in **CSV format** and create a Zip file
7. Save the **unzipped files** to the **Modern Polling Data/Register Files folder**

### Check Exported File(s)

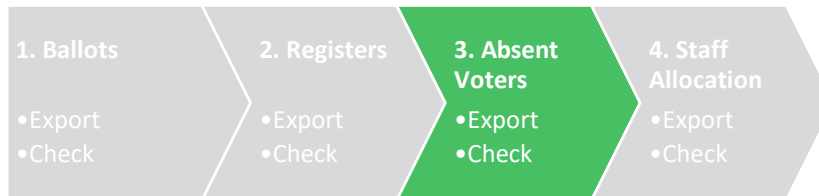
**(56 Table Headings – expected)**

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 will generate a **CSV** file format
- The file will be named: **prxyexport\_electionname\_version.csv**

#### Export Instructions

In Xpress Management (NEW):

1. Click on the **Absent Votes** sidebar.
2. Ensure that **all Issues are selected** on the top screen.
3. In the bottom screen run the document:  
Go to **Documents** – then **Exports** – then **Absent Voters Political Party (Export)**
4. Right-click on **Absent Voters Political Party (Export)** and click **Export File**.
5. On the following screen ensure that **all** is selected for **Issued** and **Absent Vote Type is set as <Proxy>** and then click **OK**.
6. Choose your **file name** and ensure the file type is a **TSV**.
7. **Save** the document in the necessary folder.  
This will create both a TSV and ZIP version of the file.
8. **Copy the TSV file to the Modern Polling Data/Proxy File folder**

#### Check Exported File(s)

(19 Table Headings – expected)

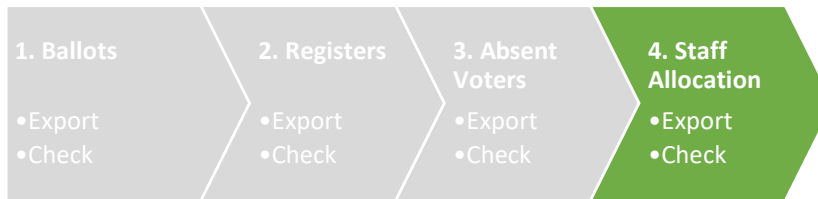
Check that the data export file contains the fields detailed below. Some applications e.g., MS Excel will alter the data when they are used to look at the fields, **DO NOT** click save after checking the fields.

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

1. ElectionDate
2. ElectionDescription
3. AreaName
4. Type

5. ElectorNo
6. ElectorName
7. ElectorAddress1
8. ElectorAddress2
9. ElectorAddress3
10. ElectorAddress4
11. ElectorAddress5
12. ElectorAddress6
13. PostalName
14. PostalAddress1
15. PostalAddress2
16. PostalAddress3
17. PostalAddress4
18. PostalAddress5
19. PostalAddress6

## 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**
- There should be **NO spaces** in the mobile number
- Ensure you tick all polling stations to ensure staff are assigned to all.
- The file will generate a **CSV** file format

### Export Instructions

In Election Management

1. Click on **Polling Stations** on the sidebar
2. Ensure that **all Issues are selected** on the top screen
3. Choose **Documents**
4. Expand the **Reports** section and choose **Polling Station Staff & Electorate**
5. Right click on **Polling Station Staff Analysis** (with the excel icon alongside) and click **Export File**
6. Copy the file to the **Modern Polling Data/Staff Allocation Files folder** and **rename the file to remove any underscores i.e., \_StaffCheckList.csv** (Modern Polling does not accept underscores in the file name when uploading).

### Check Exported File(s)

(9 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. shortdescription
2. forename
3. surname
4. stationnumber
5. telephonemobile
6. stationprefix
7. stationsuffix

\*The file may have other headings/fields in it, which is ok, if it has those 7 included

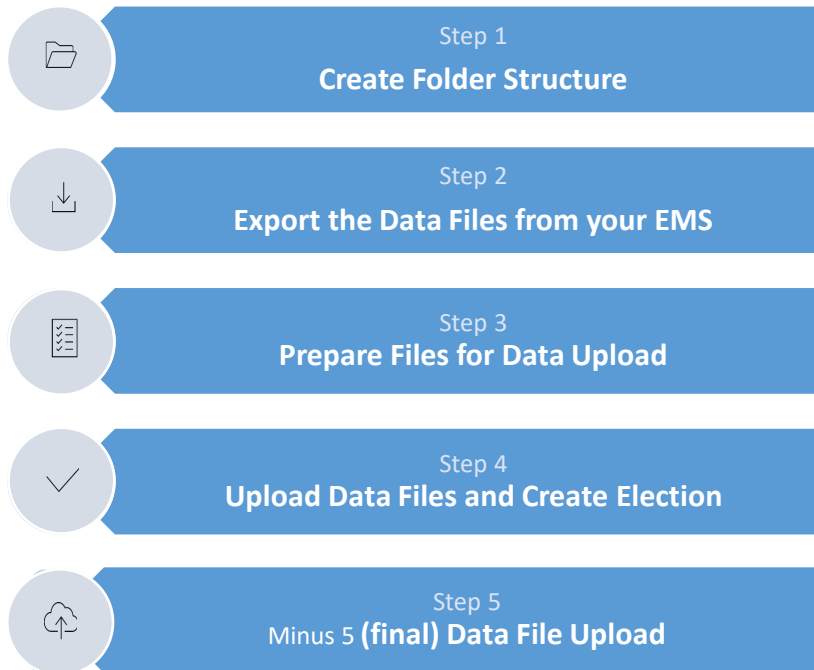
# Pre-preparation for Data Upload

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   |
|---|--|
| <b>1. Ballot Allocation</b>                 | 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  |
| <b>2. Polling Station Registers</b>         | 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 |
| <b>3. Absent Voter (Containing Proxies)</b> | 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  |
| <b>4. Staff Allocation</b>                  | 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).  
If **there is a forward slash** in the name, please contact support.

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.