

# EMS – Democracy Counts

File Export and Prep for Modern Polling

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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

### Export Instructions

1. Go to **Ballot Book Wizard** (In Wizards)
2. Check all boxes are **green ticks**
3. Go to **next**
4. Choose **election**
5. Go to **next**
6. Gives you candidate data
7. Go to **next**
8. Gives you the Ballot book Header data

9. **Ctrl A** to highlight all
10. **Right Click** to export
11. Choose **Export**
12. **Save** file when ran in folder

### **Check Export File(s)**

(28 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. ElectionID
2. AreaID
3. ElectionName
4. ElectoralArea - **needs added (should match register file column 18 or R - electoralareaname)**
5. DivisionType
6. ElectoralAreaID
7. ElectionDate
8. PollingStationNumber
9. Colour1\_Ordinary
10. Colour1BPStartNo
11. Colour1BPEndNo
12. Colour1UIMStartNo
13. Colour1UIMEndNo
14. Colour2\_Tendered
15. Colour2BPStartNo
16. Colour2BPEndNo
17. Colour2UIMStartNo
18. Colour2UIMEndNo
19. Number of Seats – **needs changed to NumberOfSeats**
20. OfficerTitle
21. OfficerName (note: this will populate the Returning Officer's name in Reports)
22. PollingPlace
23. CouncilName
24. NoOfOrdBooks

25. NoOfTenderedBooks – needs changed to NoOfTendBooks
26. PollingStationID
27. BallotBoxNo
28. BallotBoxID
29. UIMPrefix

## 2. Polling Station Register File

- The file will generate a **CSV** file format
- There will be one file for every Polling Station
- 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. **Electors & Registers**
2. **Manage Registers**
3. **Polling Station Register**
4. Choose **Election**
5. Include **Date of Births for over 18s and Future Attainers**
6. Choose **EXPORT**
7. **Register Extracts/ Polling station Register**
8. **Save** to the Modern Polling Data/Register Files folder you created.

### Check Exported File(s)

(28 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. ElectorID
2. RollNo
3. FranchiseMarker
4. OptOutMarker
5. JuryExemptMarker

6. ElectorName
7. StationCode
8. PlaceName
9. PropertyNum
10. AdministrativeArea
11. StreetDescriptor
12. TownName
13. PostCode
14. PDCode
15. PDName
16. IsDeceased
17. DOB
18. ElectoralAreaName
19. Constituency
20. VOTERTYPE
21. AV IsPostal
22. AV IsProxy
23. IsWaiver
24. IsEmergencyProxy
25. IsAbsent
26. UnverifiedDraft
27. Xordinate
28. Yordinate

### 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

1. Planning and Reporting
2. Category Search
3. Absent Voters
4. Choose Polling District
5. Choose 2 (Proxy)
6. RUN
7. Highlight ALL, export ALL to CSV
8. Save to the Modern Polling Data/Proxy File folder you created

#### Check Exported File(s)

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 will need updated to contain the following headings that Modern Democracy will use:

1. ElectorID
2. PD Ref – needs changed to PD Code
3. Roll No
4. Surname
5. Forename
6. Other Names
7. DOB
8. Property Ref
9. Proxy Name
10. Address1
11. Address2

12. Address3
13. Address4
14. Address5 – needs changed to Postcode
15. Absent Address1
16. Absent Address2
17. Absent Address3
18. Absent Address4
19. Absent Postcode
20. Absent Country
21. Voter Type
22. Electoral Area
23. Station Code
24. Polling Place Name
25. Polling Place Add1
26. Polling Place Add2
27. Polling Place Add3
28. Polling Place Add4
29. Polling Place Add5
30. Polling Place Postcode
31. Restricted Franchise
32. AV Start Date
33. Elector Type
34. Verification Status

**IMPORTANT!**

Due to the Democracy Counts EMS update, your proxy file may fail when uploaded to Modern Polling. If so, until a fix is available, please upload your proxy to our [Secure Portal Uploads](#) and we will upload on your behalf.

## 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 will generate a CSV file format
- The file will be named: StaffCheckList.csv

### Export Instructions

1. Staffing
2. Election date
3. Job term
4. Job role
5. Election Staff Appointment Summary
6. Highlight ALL, export ALL to CSV
7. Save to the Modern Polling Data/Staff Allocation File folder you created

### Check Exported File(s)

(24 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 data export file should contain:

1. Staff ID
2. Surname
3. First name
4. Home PD
5. HR Staff ID
6. Staff type
7. Department
8. Email
9. Phone
10. Mobile
11. Elector ID
12. Voting pref

13. Registered with Portal
14. Schedule name
15. Shift name
16. Job term
17. Job role
18. Start
19. End
20. Status
21. Location
22. Nationality
23. Already Eligible
24. Right to work status
25. Right to work expiry date
26. Right to work document type
27. Share code
28. Other evidence

This file will need to be amended to contain the following headings that Modern Democracy will use:

29. Shortdescription
30. Stationnumber

Short Description will be Job Role shortened down to either PO or PC.

Station Number will be found in the location column e.g., St Mary's RC Primary School – 36 from the location column in the data to be just 36.

**IMPORTANT!**

Due to the Democracy Counts EMS update, your staff file may fail when uploaded to Modern Polling. If so, until a fix is available, please upload your proxy to our [Secure Portal Uploads](#) and we will upload on your behalf.

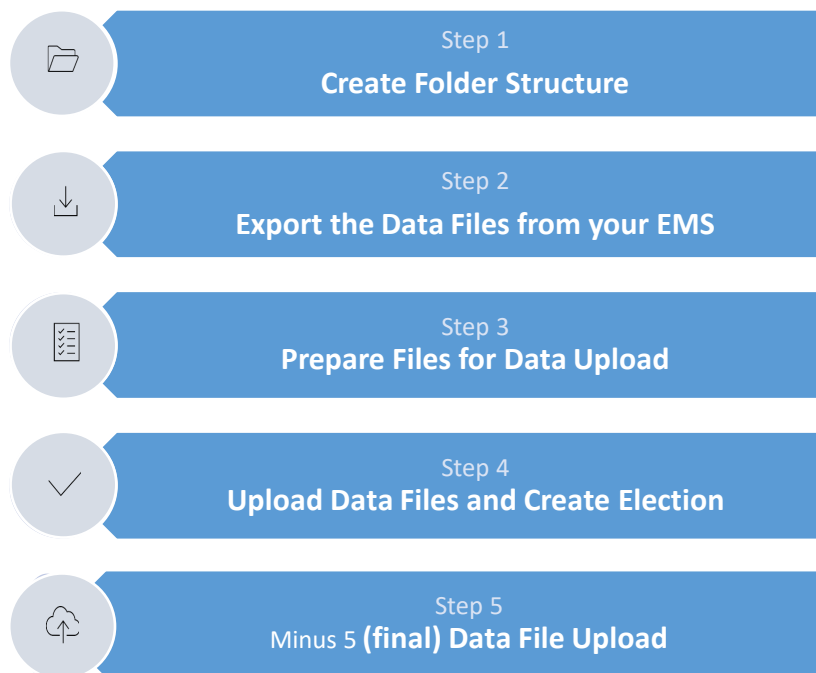
# Pre-preparation for Data & Election Creation

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:

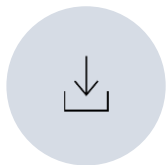




## Step 1: Create Folder Structure

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:

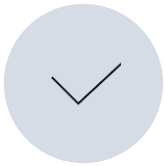
File Type	Export Steps
<b>1. Ballot Allocation</b>	From the Elections Portal, click on the Elections Tab, and select Export Files. Use the "Ballot Paper Data Export" option. Upload the "Ballot paper - book and paper numbers" data file that is generated
<b>2. Polling Station Registers</b>	From the Elections 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 lead



## 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 of 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. Browse to your **Staff Allocation Folder** and select the Staff Allocation File(s) you exported from your EMS
32. Please upload this to the Modern Polling Secure Uploads portal (uploads.moderndemocracy.com) and your project lead will upload on your behalf, this needs to be done, so we can change the encoding the staff file date file exports from the Democracy Counts EMS.
33. Your project lead will work with you to correct/amend any data validation.

**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.