



CloudVOTE Participant Management

Global List & Participant Groups

Often, you need to limit your audience, or know some basic information about those who attend your sessions.

We have implemented a concept of a Global List (GL) and Participant Groups (PG) in CloudVOTE. What's the difference between the two?

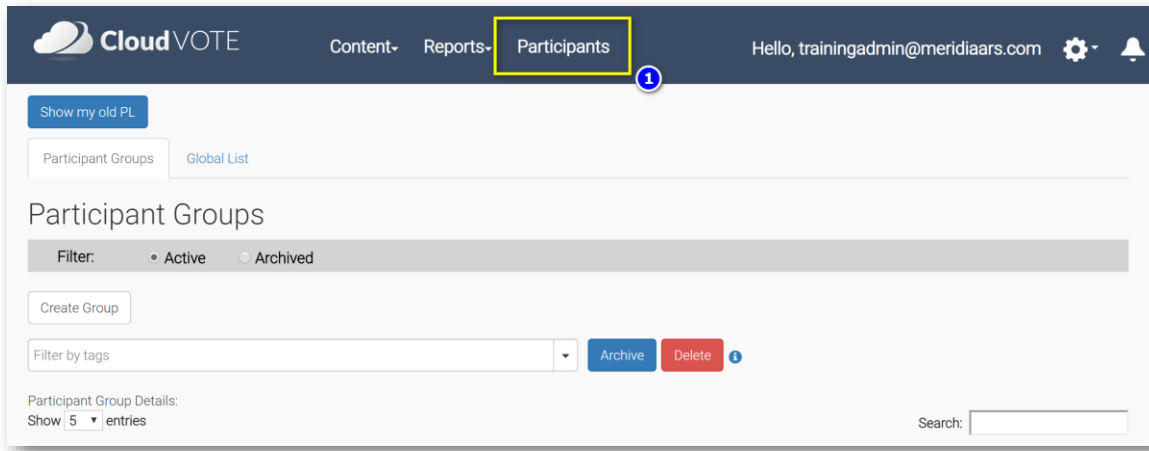
- Global List is only accessible to a Standard CloudVOTE User and Master/Parent CloudVOTE User
 - o GL contains ALL your organization's Participants (e.g. trainees from all departments, all facilities, all branches, etc....)
 - o GL is never meant to be used in anyone's individual session as a whole. Instead, it's supposed to be broken up into Participant Groups that form a logical subset of only those Participants who are being polled/tested at that moment in time
- Participant Group is a smaller, logical sub-group of the GL that represents a class, department, plant, or any other smaller unit
 - o PG can be further broken-up into even smaller sub-groups, if needed

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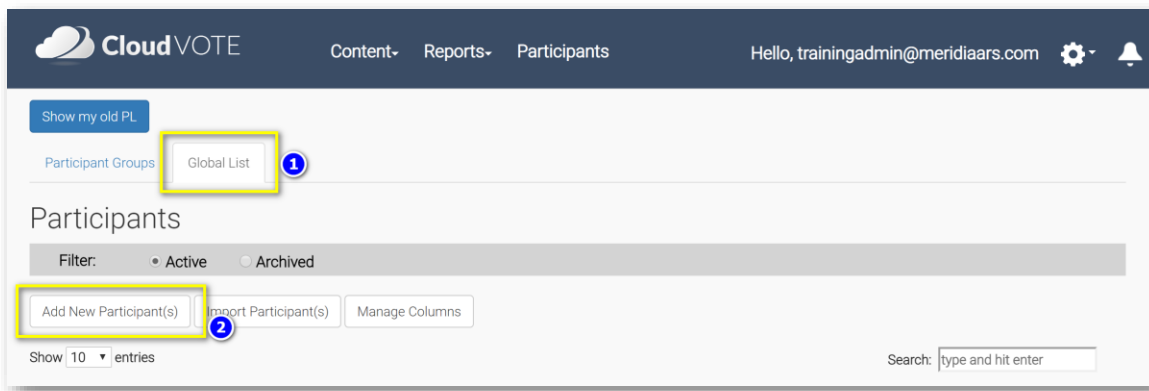
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Create a Global List

To create a *Global List*, start on your *Account Login* page and click on **Participants (1)**:



Once in the *Participants* module, click the **Global List (1)** and then **Add New Participants (2)**:



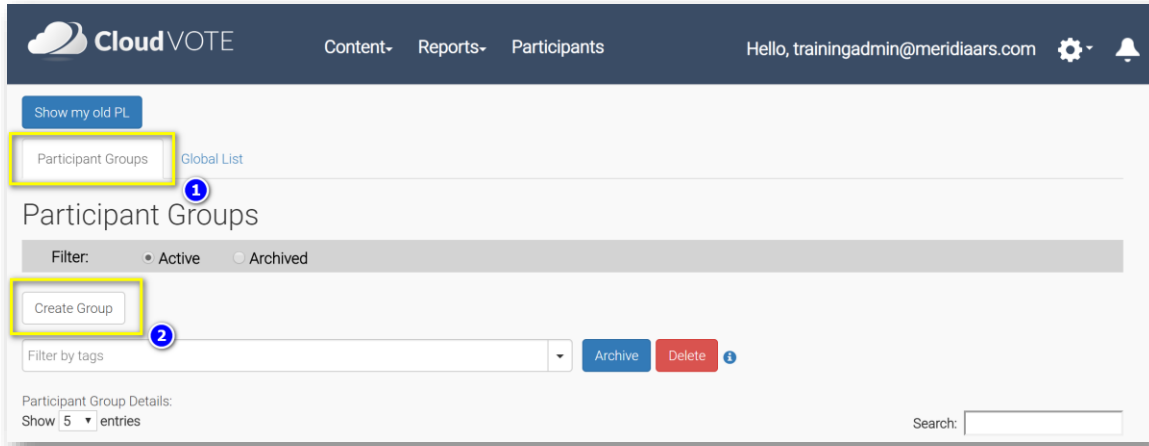
Create all the *Columns* that will define your *Global List* or import one from CSV.

The screenshot shows the 'Create Participant(s)' dialog box. At the top, it says 'Participant(s): 0'. Below that, 'Existing Column Names:' is followed by a text input field containing 'Last Name' (marked with a blue circle 1) and an 'Add Column' button (marked with a blue circle 2). Below the input field is a 'First Name' button (marked with a blue circle 3). Further down, 'Weighted Response*' is set to '1'. Below that is a 'First Name' input field (marked with a blue circle 4) and an information icon. A yellow callout box contains the text: 'As you enter each Column Name (1) and click Add Column (2) to create a list of the Columns (3), you will be able to create the individual Participant records (4) for each of the Participants in your Global List.' At the bottom, there are 'Add Participant', 'Finish', and 'Cancel' buttons.

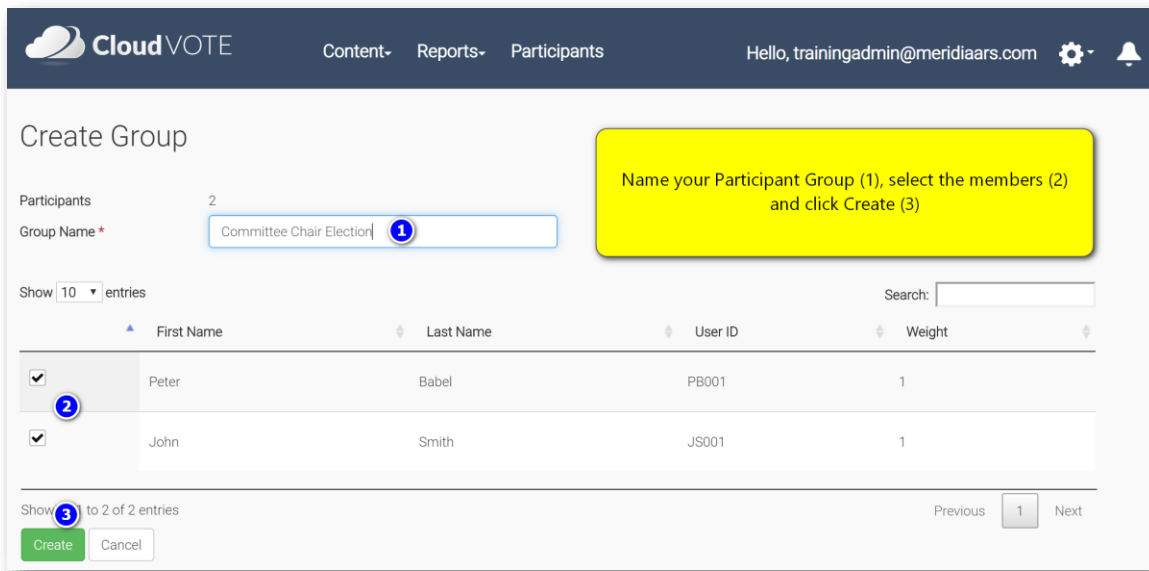
The screenshot shows the 'Create Participant(s)' dialog box with participant information entered. 'Existing Column Names:' is followed by a text input field with a placeholder 'Enter Column Name' and an 'Add Column' button. Below are three buttons: 'First Name', 'Last Name', and 'User ID'. 'Weighted Response*' is set to '1'. Below that are three input fields: 'First Name' with 'Peter', 'Last Name' with 'Babel', and 'User ID' with 'PB001'. Each input field has an information icon. A yellow callout box contains the text: 'Enter each Participant's information that is required by your polling/training policy and/or by the external system the response data and participant information will be passed into. Click Add Participant to add another person, or click Finish when you're done.' At the bottom, there are 'Add Participant', 'Finish', and 'Cancel' buttons.

Create a Participant Group

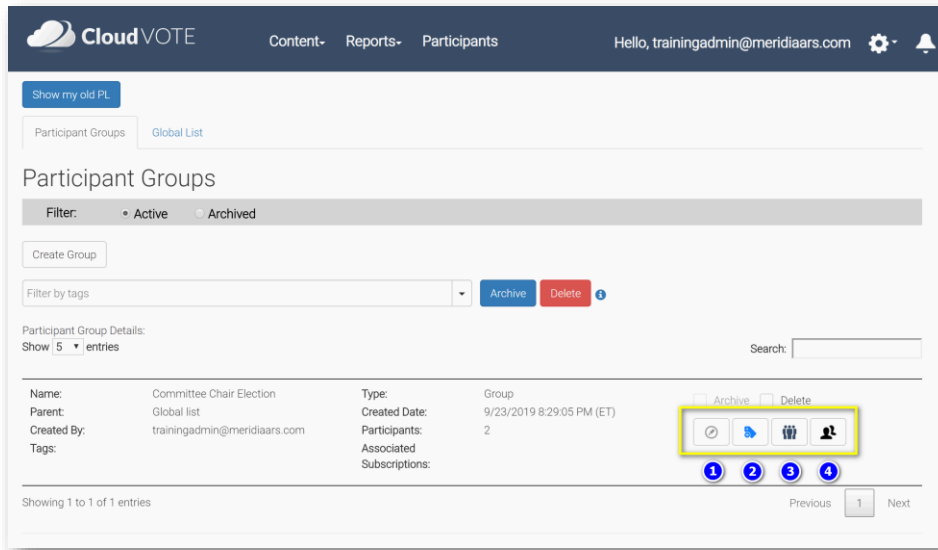
When you're done creating the *Global List*, you can create a *Participant Group* by clicking on the **Participant Group** (1) and then on **Create Group** (2):



Name your *Participant Group*, select the members from the *Global List* below and click **Create**:



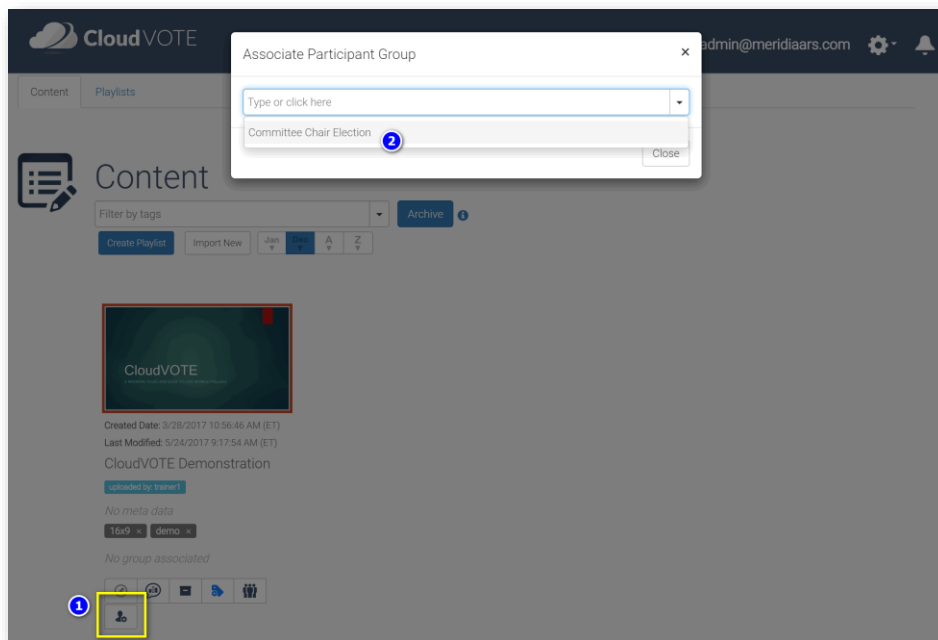
Once the *Participant Group* (PG) has been created, you can **keep editing** it (1), **assign some tags** such as “Sales”, or “Safety Training” (2) to it, **associate** your Child subscriptions to the PG (3) if you are logged in as a Parent, or you can **create a sub-group** (4) if you need to split up the PG even further.



Assign the Participant Group to Template(s)

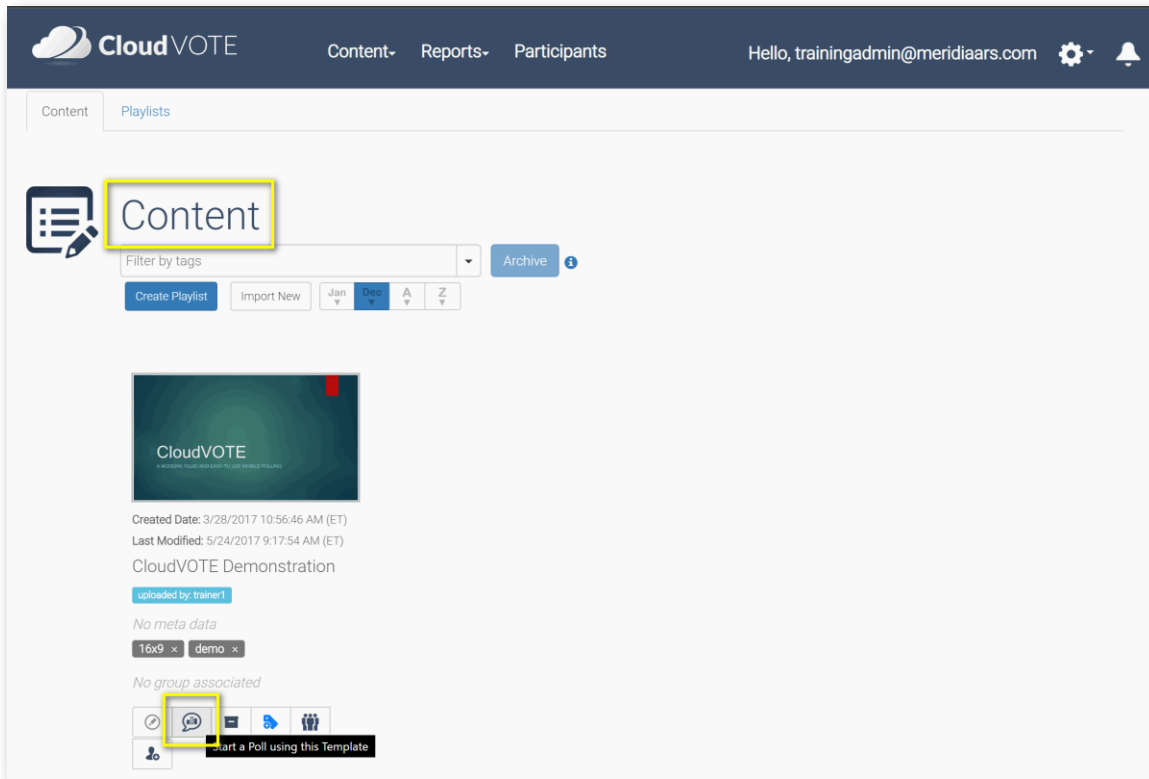
Now it's time to assign the *Participant Group(s)* to each of your *Templates*, so that when you start a session, the *Participants* are properly identified.

Go to *Content* tab and click the ‘**People**’ icon below the *Template* thumbnail (1). Then select from the drop-down list of existing *Participant Groups* and click **Close**.

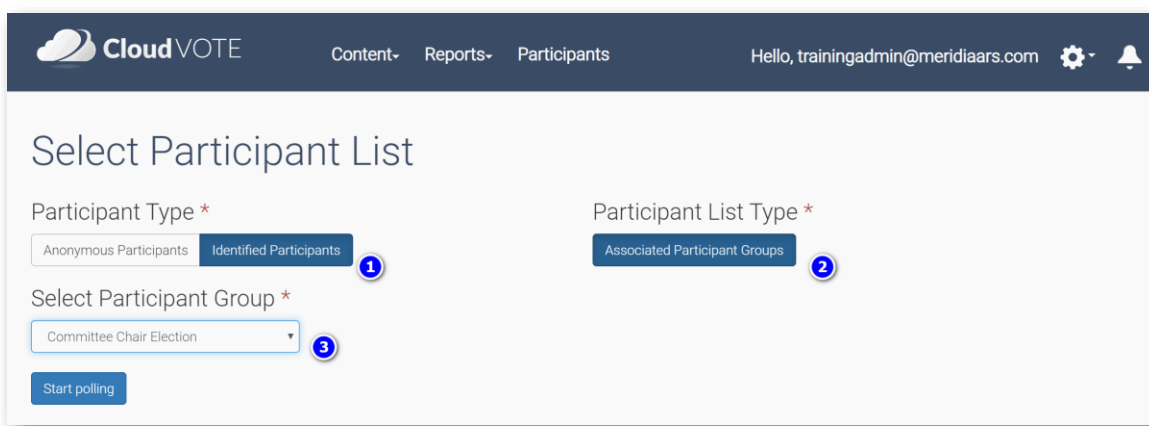


Start a Polling Session (as an Operator)

Start a session by selecting your desired *Template* and click the **Start Polling Session** button.

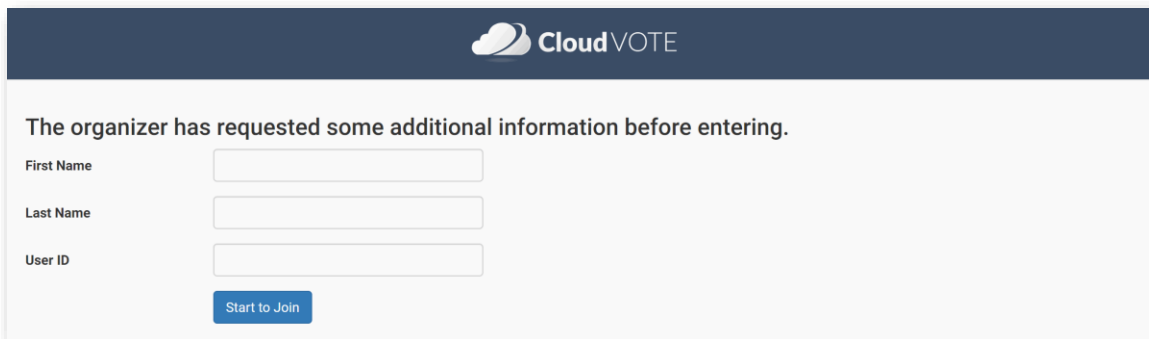
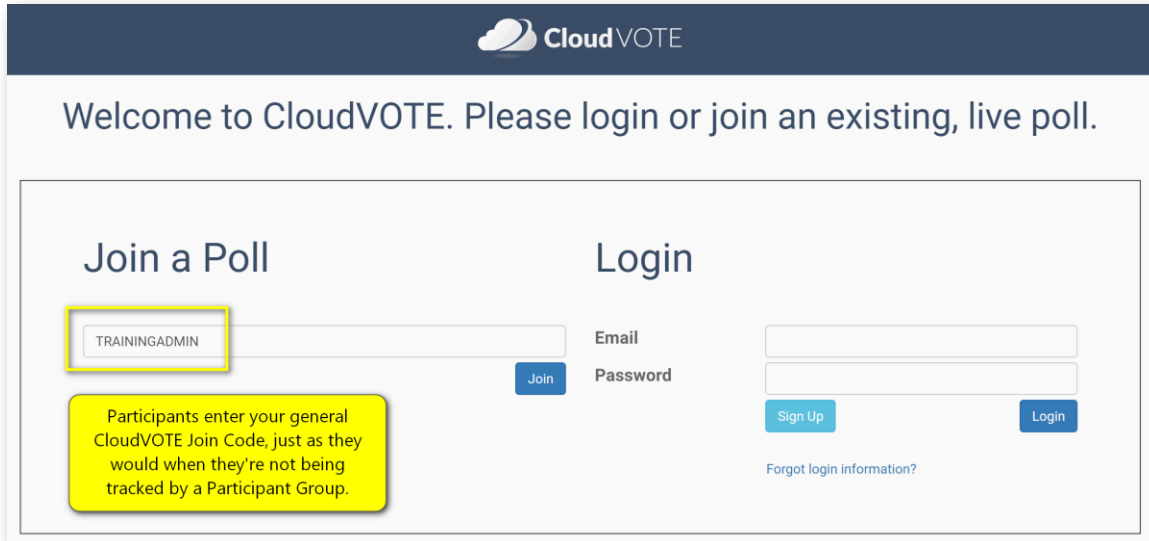


Select **Identified Participants**, then select **Associated Participant Groups** and finally choose from the PG that you've created previously and have assigned to this *Template*.



Join a Polling Session (as a Participant)

After seeing the standard *Join a Poll* page and entering the general CloudVOTE *Join Code*, each *Participant* will have to enter additional information to be let into the session.



Upon entering, the *Operator* needs to approve/deny the *Participant's* entry, while the *Participant* sees a 'holding' message on their device.

Please wait until operator verifies your data.

If the entry was denied, another message will inform the *Participant* immediately.

Operator couldn't verify your data. Please contact with admin for further support.

Operator View

If the Operator **approves** the entry, *Participant* can now see the content and vote in the session.

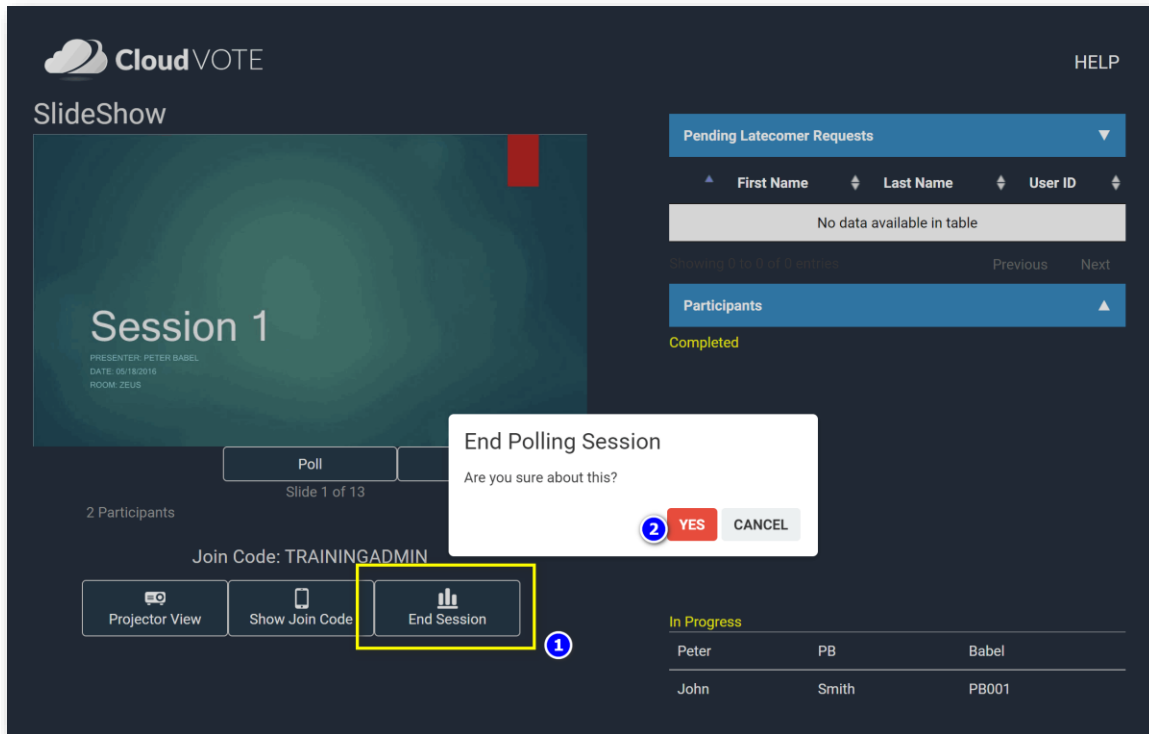
The screenshot shows the CloudVOTE interface. On the left, a slide titled "CloudVOTE" is displayed with the text "A MODERN, FLUID AND EASY TO USE MOBILE POLLING". Below the slide are buttons for "Poll" and "Next", and the text "Slide 1 of 13". At the bottom, there is a "Join Code: TRAININGADMIN" and three buttons: "Projector View", "Show Join Code", and "End Session". On the right, there is a "HELP" link and a "Pending Latecomer Requests" table. The table has columns for "First Name", "Last Name", and "User ID". One entry is visible: Peter Babel with User ID PB. A yellow box highlights a green checkmark and a red X icon next to the name. Below the table are buttons for "Participants", "Text Messages", and "Word Cloud".

During the session, the *Operator* sees within the **Participants** tab who has answered the question (2), and who still must cast their vote (1).

The screenshot shows the CloudVOTE interface during a poll. The slide on the left asks "DO YOU AGREE THAT PRESENTATIONS SHOULD BE ENGAGING?" with three options: "1. Yes", "2. No", and "3. Depends on the presentation". A large yellow text overlay says "Please Vote Now". Below the slide are buttons for "Close" and the text "Slide 6 of 13". At the bottom, there is a "Join Code: TRAININGADMIN" and three buttons: "Projector View", "Show Join Code", and "End Session". On the right, there is a "HELP" link and a "Pending Latecomer Requests" table. The table is empty, showing "No data available in table". Below the table is a "Participants" tab. The "Participants" tab shows two rows: "Completed" and "In Progress". The "Completed" row shows John Smith with User ID PB001, and the "In Progress" row shows Peter Babel with User ID PB. Yellow boxes highlight these rows, with a circled '2' next to the completed row and a circled '1' next to the in progress row.

Ending the Session and Reporting

After the *Session* is over, *Operator* clicks **End Session** button (1) and confirms (2) by clicking **Yes**.



The screenshot shows the CloudVOTE interface during a session. The main area displays 'Session 1' with presenter information. A 'Poll' button is visible. At the bottom, the 'End Session' button is highlighted with a yellow box and a blue circle with the number 1. A modal dialog box titled 'End Polling Session' is open, asking 'Are you sure about this?' with 'YES' and 'CANCEL' buttons. The 'YES' button is highlighted with a blue circle and the number 2.

CloudVOTE HELP

SlideShow

Session 1
PRESENTER: PETER BABEL
DATE: 05/18/2016
ROOM: ZEUS

Pending Latecomer Requests

First Name	Last Name	User ID
No data available in table		

Showing 0 to 0 of 0 entries Previous Next

Participants

Completed

2 Participants

Join Code: TRAININGADMIN

Projector View Show Join Code End Session

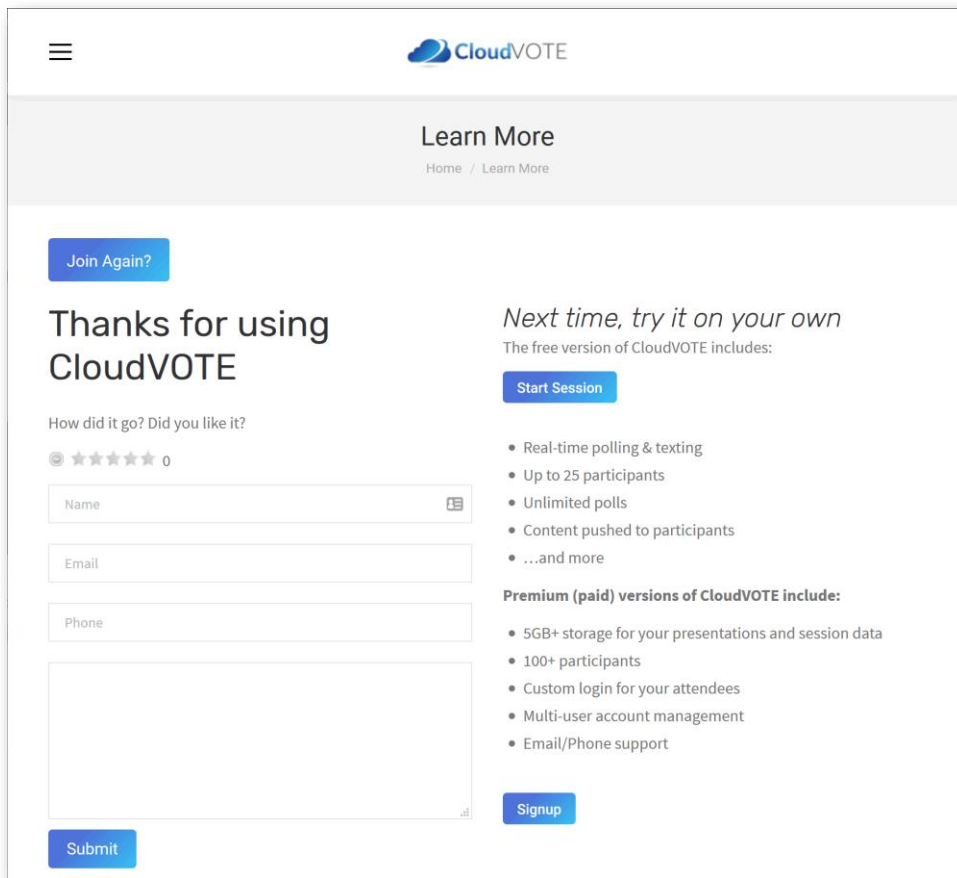
End Polling Session
Are you sure about this?

YES CANCEL

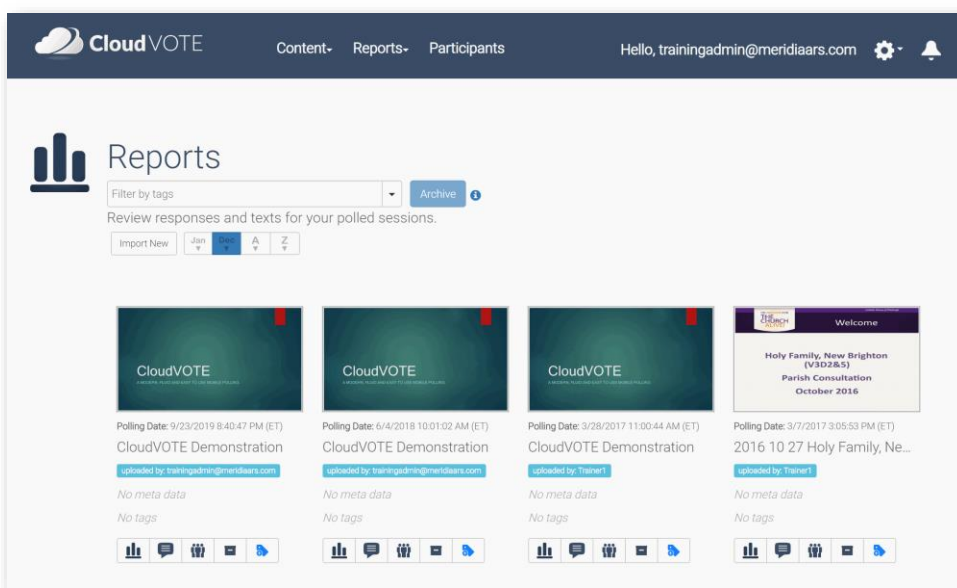
In Progress

Name	Initials	User ID
Peter	PB	Babel
John	Smith	PB001

Immediately after this, every *Participant* is 'kicked' out of the Session and the *Operator* returns to CloudVOTE, but in the *Reports* section.

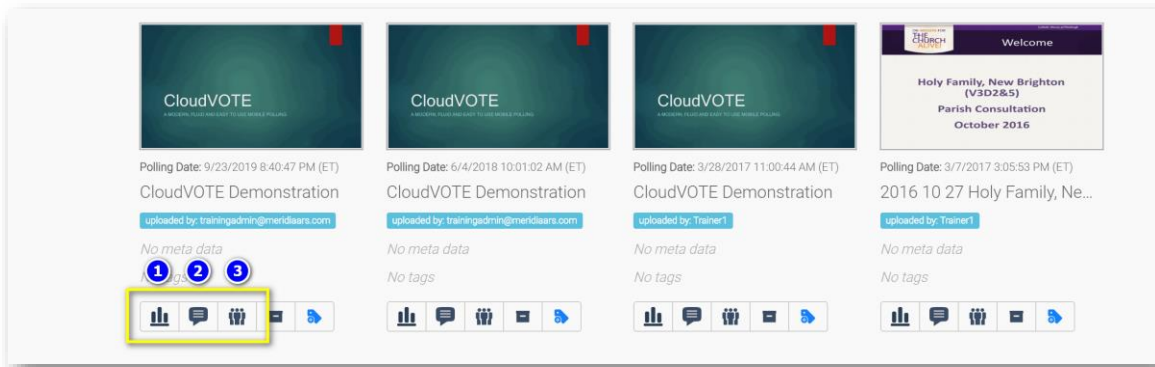


The screenshot shows the 'Learn More' page in the CloudVOTE interface. At the top, there is a 'Join Again?' button. Below it, a large heading reads 'Thanks for using CloudVOTE'. A feedback section asks 'How did it go? Did you like it?' with a star rating system (0 stars shown) and a form with fields for Name, Email, and Phone, followed by a 'Submit' button. To the right, a section titled 'Next time, try it on your own' lists features of the free version: Real-time polling & texting, Up to 25 participants, Unlimited polls, Content pushed to participants, and ...and more. Below this is a 'Start Session' button. A 'Premium (paid) versions of CloudVOTE include:' section lists: 5GB+ storage for your presentations and session data, 100+ participants, Custom login for your attendees, Multi-user account management, and Email/Phone support. A 'Signup' button is located at the bottom right of this section.

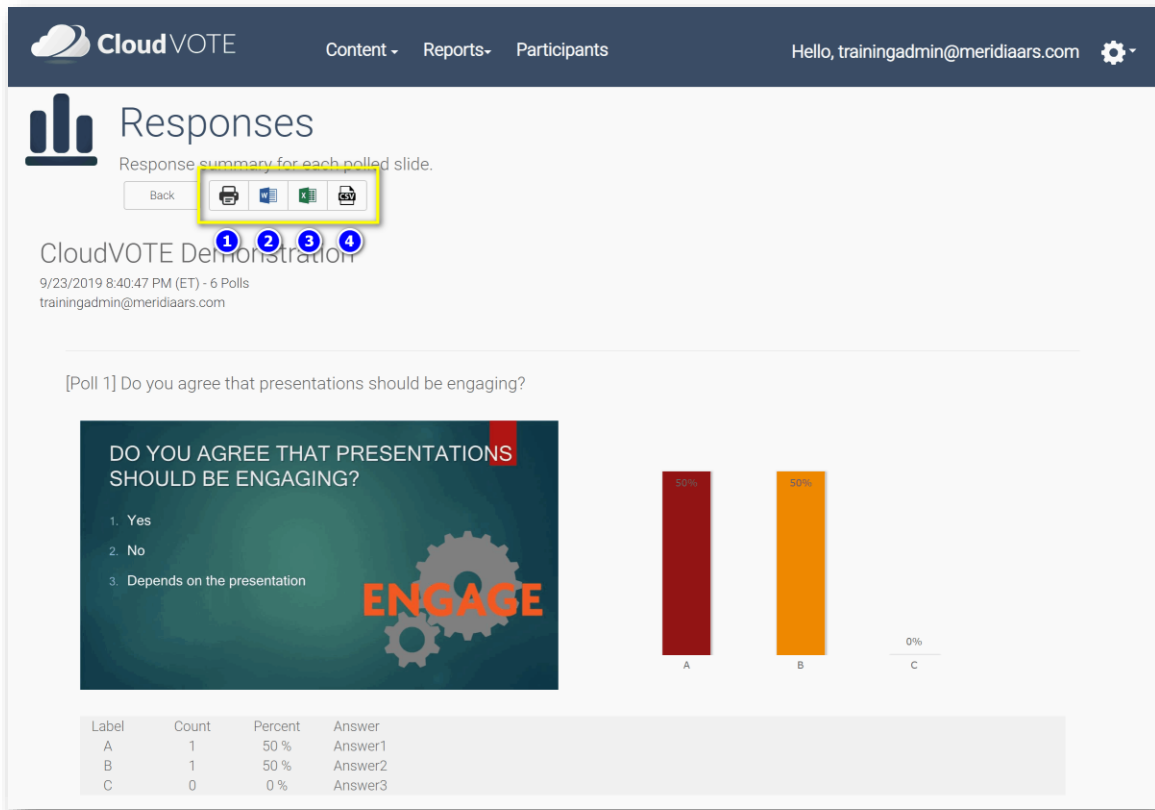


The screenshot shows the 'Reports' section of the CloudVOTE interface. The top navigation bar includes 'Content-', 'Reports-', and 'Participants', along with a user greeting 'Hello, trainingadmin@meridiaars.com' and settings/notification icons. The 'Reports' page features a bar chart icon, a 'Filter by tags' dropdown, and an 'Archive' button. Below this is a sub-header 'Review responses and texts for your polled sessions.' and a control bar with 'Import New', a month selector (Jan), and sort options (A, Z). The main content area displays four report cards. Each card shows a 'CloudVOTE' logo, a 'Polling Date', the report title, the uploader, and 'No meta data' and 'No tags' information. The reports are: 1) 'CloudVOTE Demonstration' (9/23/2019 8:40:47 PM ET, uploaded by trainingadmin@meridiaars.com); 2) 'CloudVOTE Demonstration' (6/4/2018 10:01:02 AM ET, uploaded by trainingadmin@meridiaars.com); 3) 'CloudVOTE Demonstration' (3/28/2017 11:00:44 AM ET, uploaded by Trainer1); 4) '2016 10 27 Holy Family, Ne...' (3/7/2017 3:05:53 PM ET, uploaded by Trainer1).

The available reports are: **Response Summary, Texting, and Individual Participants.**



Each of the reports can be **printed** (or **'printed' to PDF**), as well as **exported to Word, Excel and CSV.**



Questions? Issues?

Let us know by submitting a ticket, emailing us at support@meridiaars.com, or support@cloudvote.com, or calling us at 610-260-6800.