

TownVOTE 3.1

User Guide

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WHAT'S NEW

In the latest version, TownVOTE v3.0.247, we've changed a few labels and rearranged some elements to make the workflow 'flow' better.

We also added a few new features:

- Support for new EZ-VOTE 5S keypads and EXT-S base receiver
- Security Settings section
- Support for a Hybrid session where online (WebPad) and offline (Keypad) participants can vote together
- Added a Base Connectivity indicator in Offline and Hybrid mode
- TownVOTE now auto-detects the base when you plug it in
- Brand-new Pre-Vote screen with:
 - o Speakers Queue
 - o Speaker Timer
 - o Notes
 - o Motion/Second record
 - o Hand/Voice vote record
- And many more. See full [Release Notes here](#).





Launch the EZ-VOTE Connect app from the desktop and select the **Voting & Elections** module (banner) from the Dashboard:

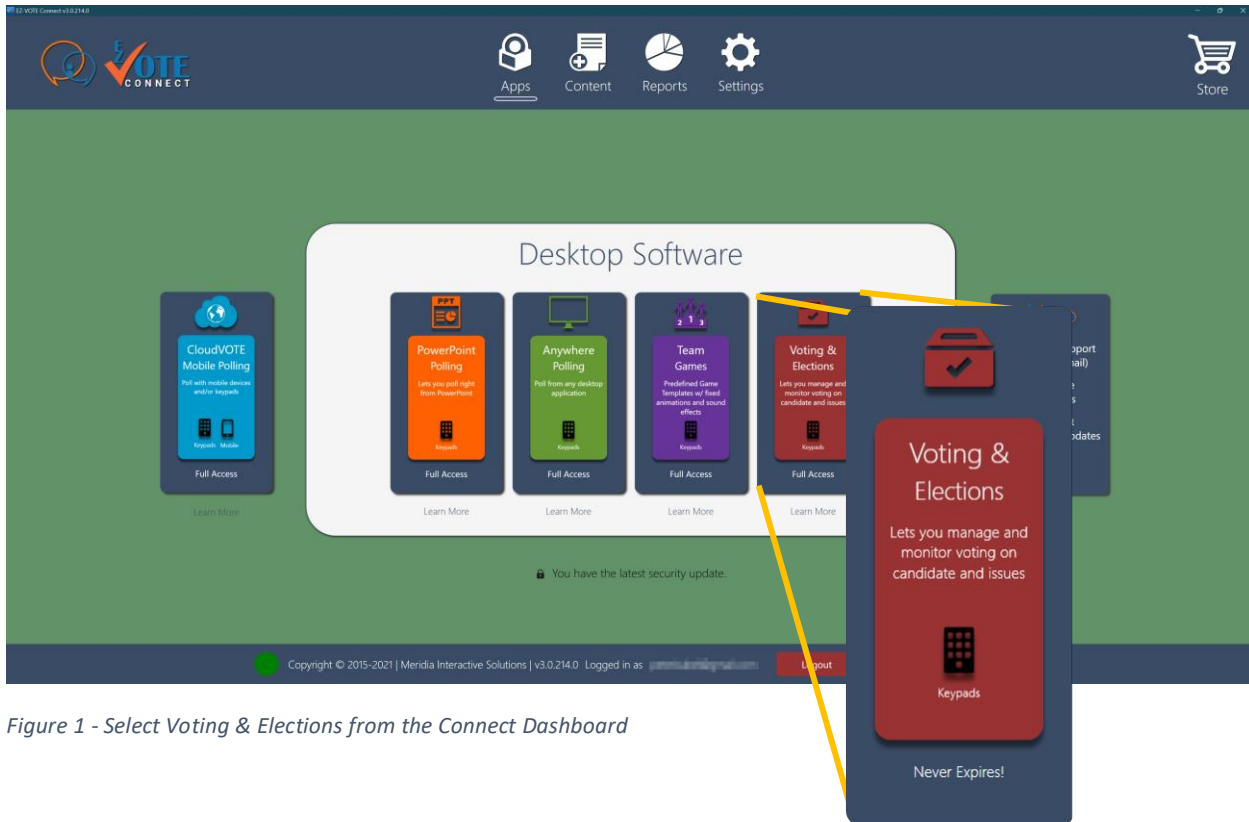
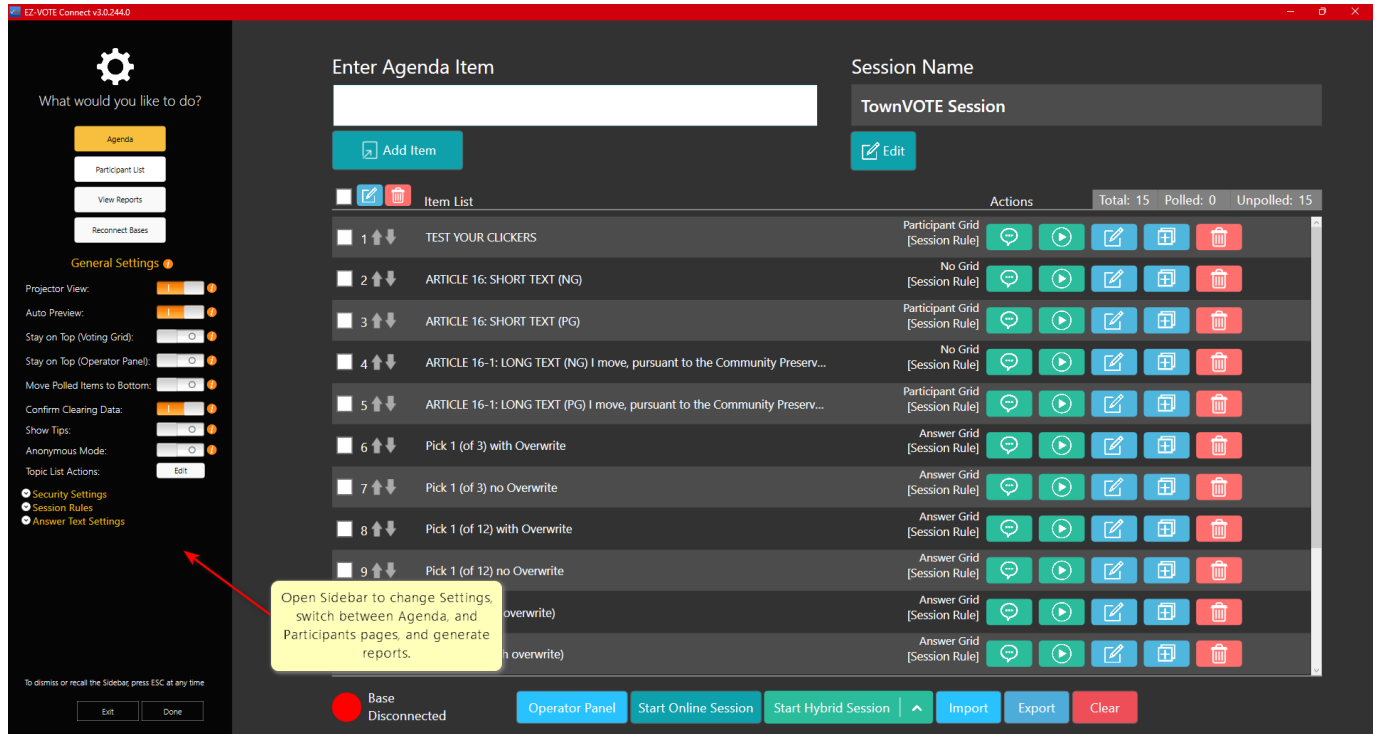


Figure 1 - Select Voting & Elections from the Connect Dashboard



QUICK OVERVIEW

On the left, the **Sidebar Settings** can be opened by clicking the white arrow in the bottom-left corner, or pressing the ESC key on the keyboard. This is where you change your General (session-wide) settings, Session Rules, Answer Text, and Security settings.



To run a voting session in TownVOTE, you'll need:

- **Agenda (Articles/Motions/Resolutions)**
- **Participant List (Keypad Roster)**

Agenda page lets you create motions/articles, export and import an existing agenda, and do an ad-hoc vote. Once you have the motions entered, you can open the Pre-Vote screen or open any Article/Motion in voting mode.

Participants page (Participant List button) lets you create an identifiable or anonymous roster, import and export an existing participant list and manage your online participants.

The **View Reports** button takes you to the list of previous sessions with voting data, so that you can generate (Excel) reports and screenshots from them.

Reconnect Bases button allows you to manually reconnect the base receiver(s) in case they fail to auto-detect.

TIP: Use the Base Connectivity Indicator to monitor your base receiver connection. The base connection will be attempted automatically when the TownVOTE app starts, and as soon as it is plugged in.

You may have issues connecting to the base if another program is using (already connected to) the base – such as our PowerPoint Plugin, so shut down any other applications that may interfere with the hardware first.



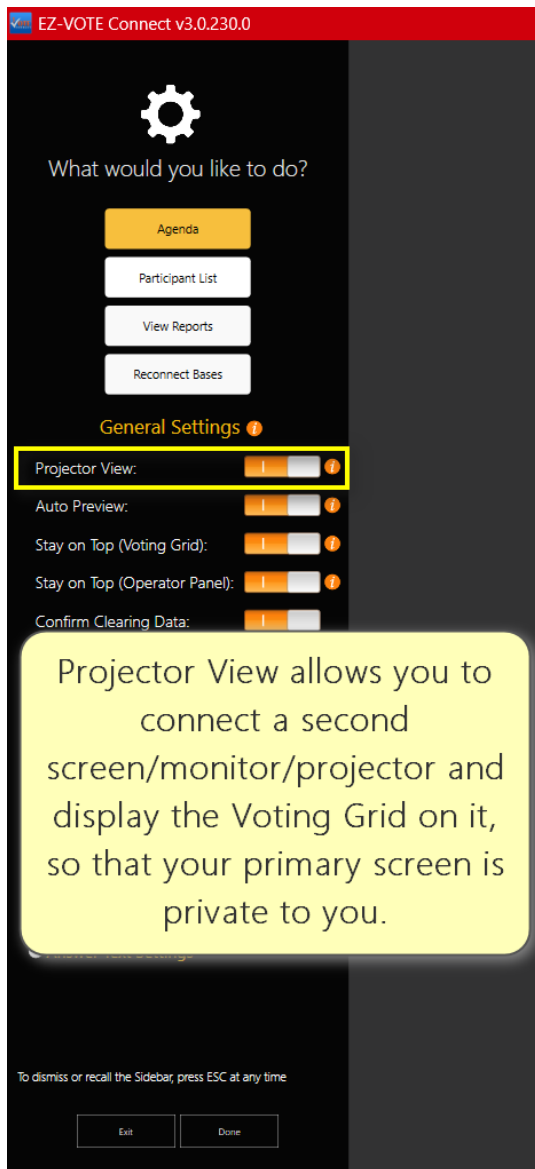
SIDEBAR SETTINGS

PROJECTOR VIEW

Projector View allows you to setup your secondary screen (e.g., projector or monitor) as an Extended Screen and let the audience see the Voting Grid/Results, but keep them from seeing your Operator Screen (e.g., Agenda) where you type the Articles and click with the mouse.

With the Projector View turned on, when you click the Vote Now button, a new, movable window will open and you can drag it and move it to the second screen.

You have the option to turn on Auto Preview to show the results automatically after the vote is closed, or keep them from seeing the results until you click another “Review” button manually. See below for more information.



EZ-VOTE Connect v3.0.230.0

What would you like to do?

- Agenda
- Participant List
- View Reports
- Reconnect Bases

General Settings ⓘ

- Projector View: ⓘ
- Auto Preview: ⓘ
- Stay on Top (Voting Grid): ⓘ
- Stay on Top (Operator Panel): ⓘ
- Confirm Clearing Data:

Projector View allows you to connect a second screen/monitor/projector and display the Voting Grid on it, so that your primary screen is private to you.

To dismiss or recall the Sidebar, press ESC at any time

Exit Done



AUTO PREVIEW

When Auto Preview toggle is ON, your results will be shown automatically after the vote is closed. If you turn it OFF, the results will NOT be shown and you have to click the **Review** button manually to display them.

The screenshot shows the EZ-VOTE Connect v3.0.230.0 interface. On the left is a sidebar with a gear icon and the text "What would you like to do?". Below this are buttons for "Agenda", "Participant List", "View Reports", and "Reconnect Bases". Under "General Settings", there are four toggle switches: "Projector View:", "Auto Preview:", "Stay on Top (Voting Grid):", and "Stay on Top (Operator Panel):". The "Auto Preview:" toggle is highlighted with a yellow box and is currently turned ON. A red arrow points from this toggle to the "Review results" button in the "Actions" panel on the right. The "Actions" panel shows a table of session rules with various icons and buttons. The "Review results" button is highlighted in yellow. A yellow callout box at the bottom left contains the text: "Auto Preview automatically shows the results of the vote to the audience. If turned off, the vote will close and be recorded, and you have to click to show the results manually." At the bottom of the sidebar, there are "Exit" and "Done" buttons.

Auto Preview automatically shows the results of the vote to the audience. If turned off, the vote will close and be recorded, and you have to click to show the results manually.



STAY ON TOP

Stay on Top is helpful when you have other windows that keep ‘popping-up’ in front of the Voting Grid (Results) and you want to make sure that nothing is able to cover the Results screen.

EZ-VOTE Connect v3.0.230.0

What would you like to do?

- Agenda
- Participant List
- View Reports
- Reconnect Bases

General Settings ⓘ

Projector View: ⓘ

Auto Preview: ⓘ

Stay on Top (Voting Grid): ⓘ

Stay on Top (Operator Panel): ⓘ

Confirm Clearing Data: ⓘ

51.0% Change ⓘ

Ignore Non-Voters: ⓘ

Answer Text Settings

To dismiss or recall the Sidebar, press ESC at any time

Exit Done



VOTING RULES

This is a very important section of the application, because it saves time and ensures accurate

EZ-VOTE Connect v3.0.230.0

What would you like to do?

Agenda

Participant List

View Reports

Reconnect Bases

The Voting Rules section governs the Session-Wide rules: set one rule for ALL Articles at once. You can make rule exceptions on a per-Article basis later.

Topic List Actions: Edit

Voting Rules

Simple Majority

2/3 Majority

Custom

51.0% Change ⓘ

Ignore Non-Voters: ⓘ

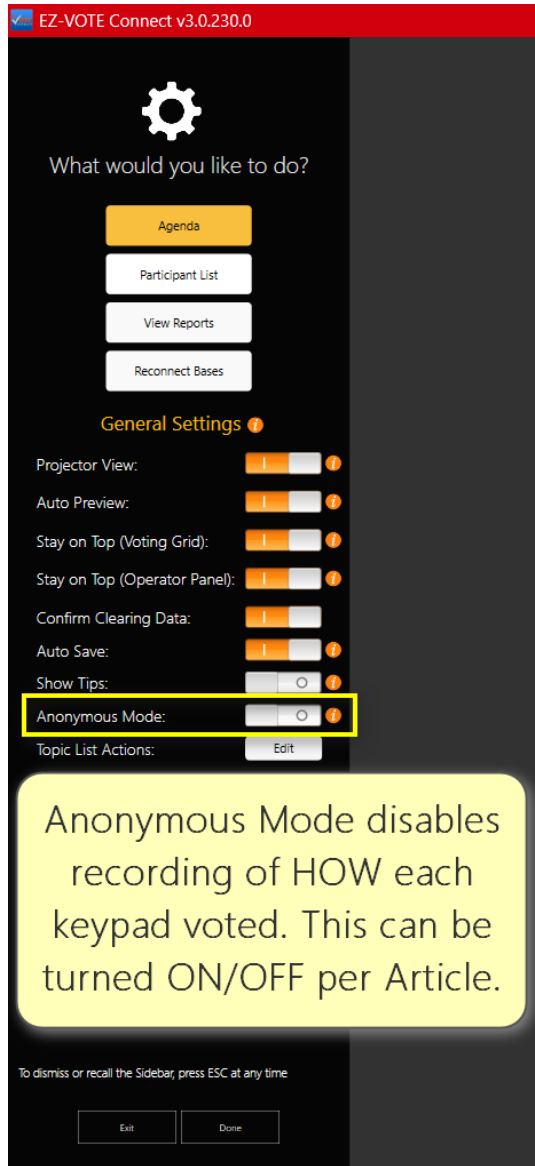
Answer Text Settings

Ignore non-voters should be on, so that ONLY the VOTING keypads are counted



ANONYMOUS MODE

Anonymous Mode allows you to control the complete anonymity of the vote. Even though the software doesn't need the names to be associated with the clickers and will only show "Keypad 1 voted Yes" or "Keypad 13 voted No", when needed, we can 'scrub' this information and only record "Keypad 1 voted" in the final report.



Starting the program for the first time, you will see only the Agenda page and the list of Articles will be blank:

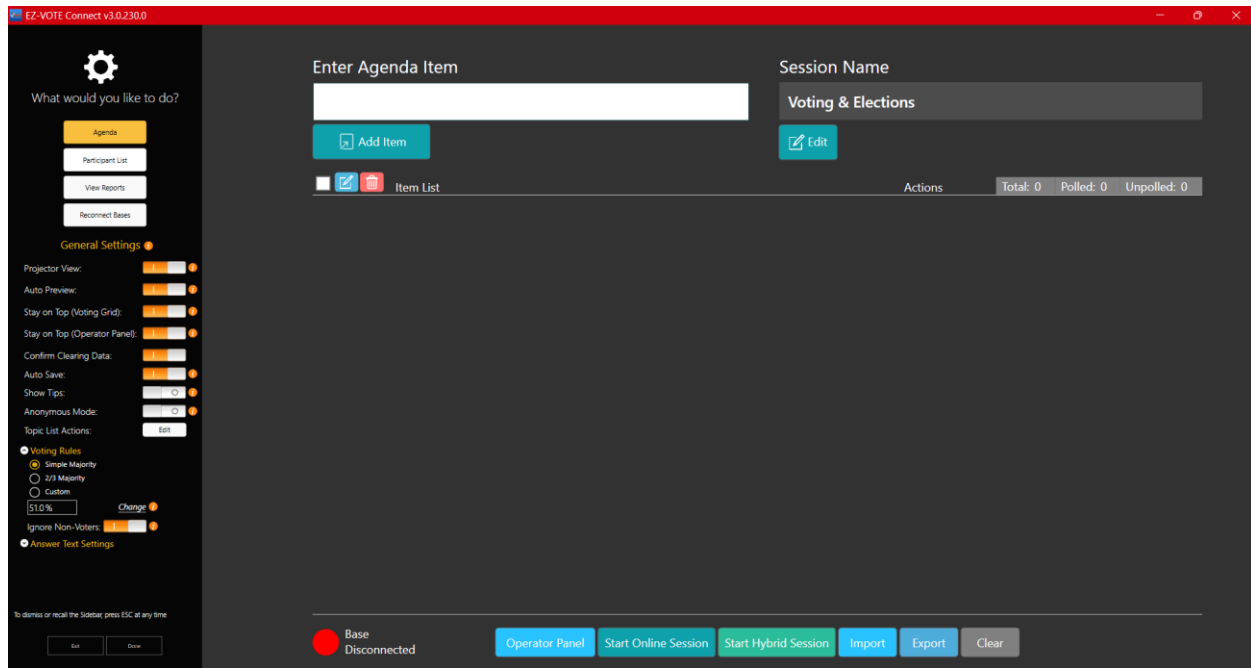


Figure 2 - Blank Agenda page. Enter your Motions at the top (white box) and press Enter.

However, if you are starting the program for the second or any subsequent time, you will see a prompt that makes your life easier by restoring all the previous content of the Agenda and/or the Participant List.

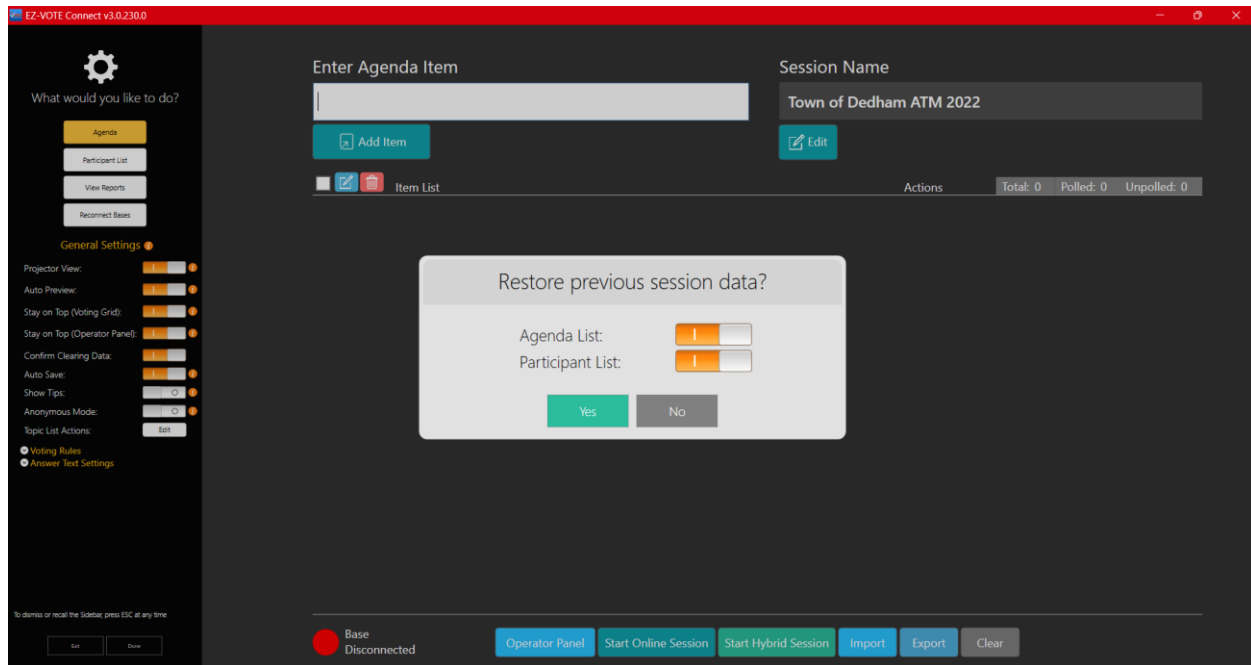


Figure 3 - If you already worked on your Agenda before and are restarting the TownVOTE app, you can restore any previous work you've done, including the Agenda and Participants.



Once you restore the session, it will have all your Articles/Motions, their respective Voting Rules and the Voting Grid settings (No Grid vs Participant Grid) that you set up before.

Agenda page allows you to pre-load all your Articles/Motions ahead of time, organize them in the order that you expect to vote on them, and edit them on the fly, if needed. Simply press Enter after each topic text and start typing the next one. You can also copy and paste the Articles from your Warrant, or other document that contains all of the voting items for your meeting.

This section also offers a **Pre-Vote Screen**, so that you can record who made the motion, who seconded it, who wants to speak for/against/comment on the Article, or you can use a Speaker Timer and even record a Voice/Hand vote if needed. And of course, after the debate, you can click the Start button to initiate an electronic vote. If you have the Projector View toggle turned on, the Speaker Timer will appear on the 'extended screen' (second monitor, or projector).

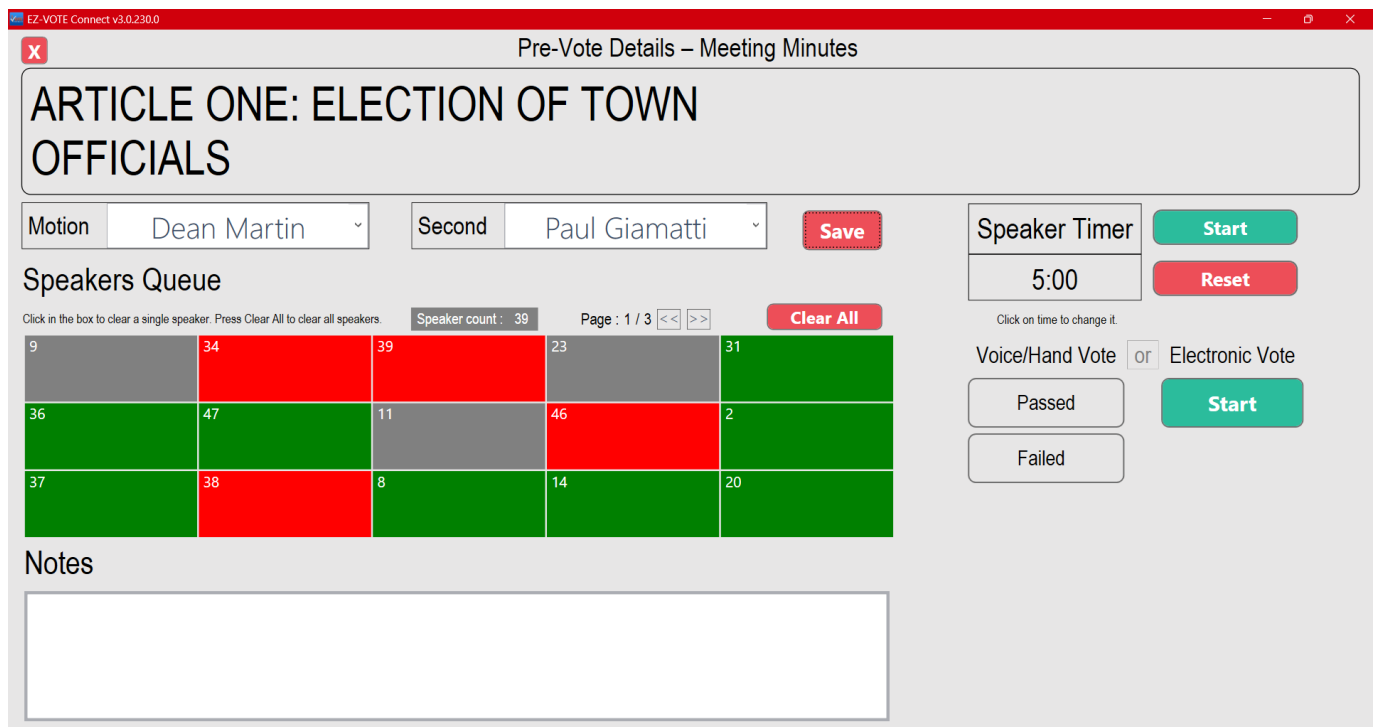


Figure 4 - Pre-Vote screen lets you record notes and information for your Meeting Minutes, so that everything becomes part of the final report.

Using a **Participant List** is a critical step that ensures only the people who are authorized to vote will be able to participate in the polling. Simply provide the information with linked Keypad ID and Name and TownVOTE will take care of the rest.

IMPORTANT: if you don't wish to link names to clickers – select the Keypad Range option and just enter the range of clickers you own, or those you wish to use, for example: 1 – 100 or 501 – 1000.

IMPORTANT: If you don't include a keypad in the Participant List, it will be ignored and NOT counted. For example, if you specify a range of 1 – 100, keypad 101 and higher will not work. Alternatively, if you remove a keypad #3 from the list, it will be ignored also.



DETAILED INSTRUCTIONS

AGENDA

When the app starts, you can start entering your pre-defined motions, amendments in the **Agenda** section:

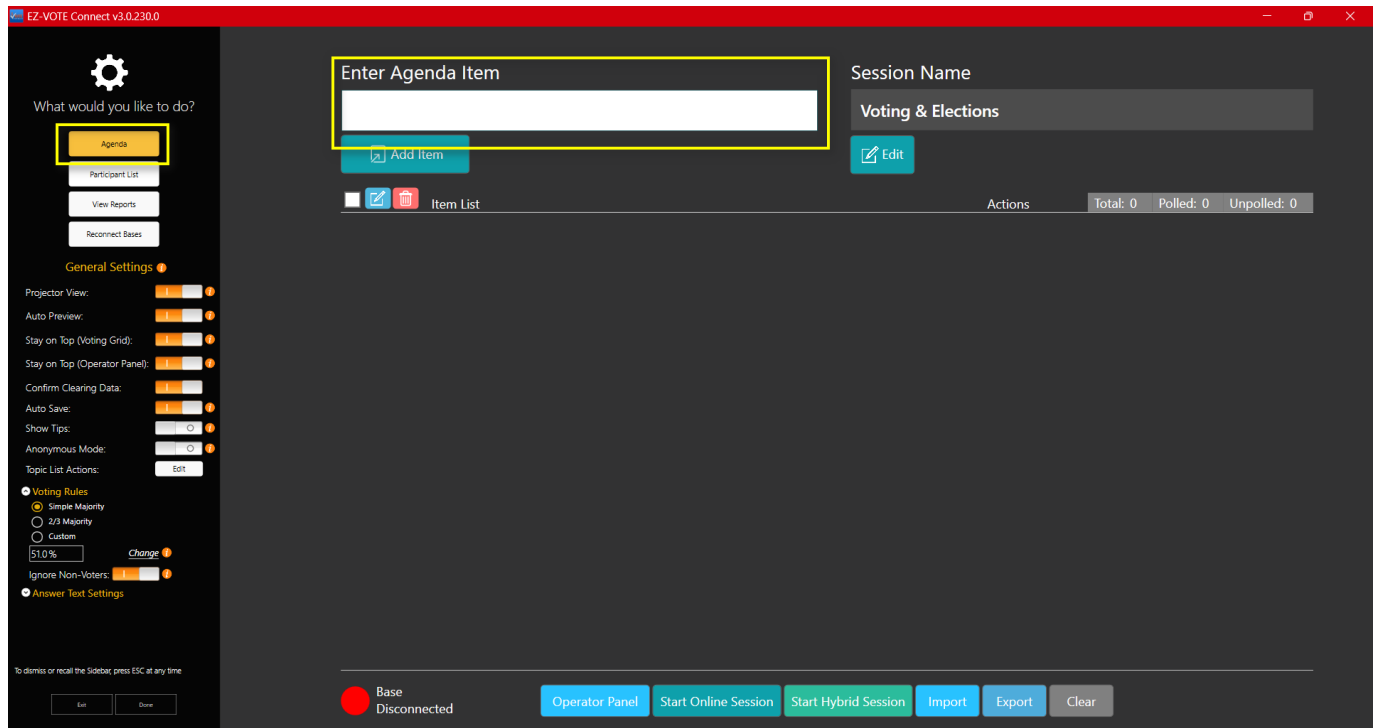


Figure 5 - Enter your motions and amendments on the Agenda page. Start by typing or paste text from another source (e.g. document) into the white box at the top and press Enter.

Type or paste text in the white box at the top and press Enter.

TIP: Copying and pasting from PDF will carry over some undesirable formatting that can be fixed easily, but you can avoid it by copying from a MS Word format instead.



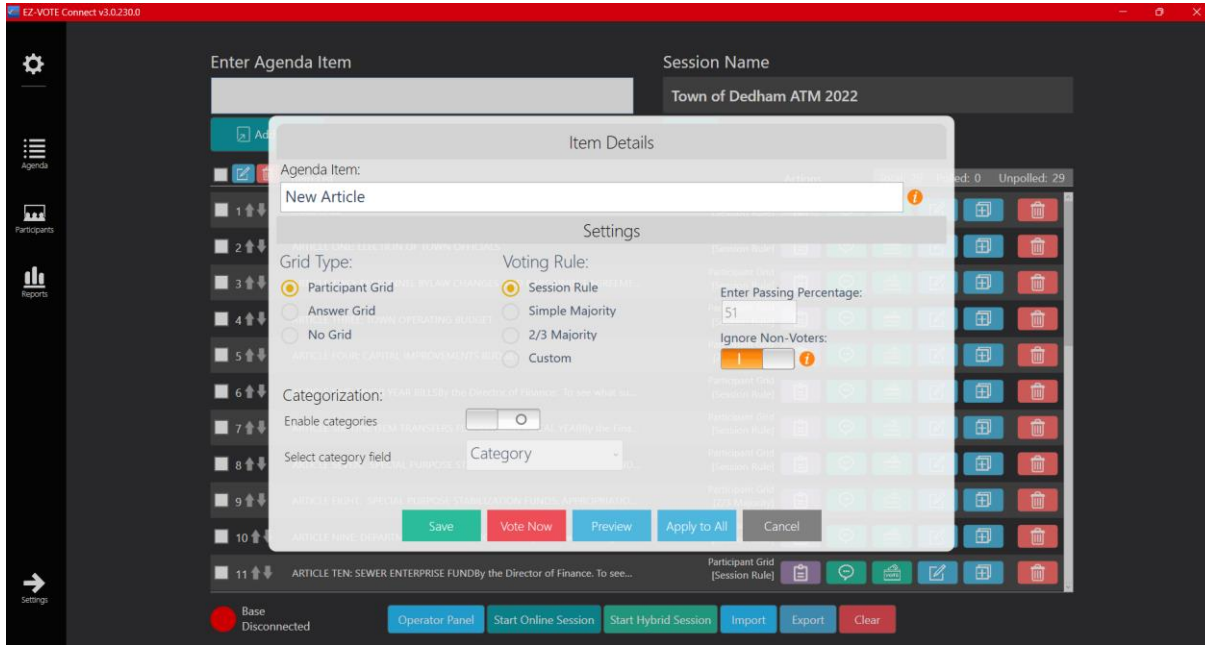


Figure 6 - Choose the Grid Type and Voting Rule. Click Save when finished, or Vote Now if you want to vote right away.

Choose a Participant Grid option if you want to see that each keypad voted, or if you need to associate the names of the voters with each clicker. You don't have to set up the answers – they are assumed to be Yes/No/Abstain, or just Yes/No.

Choose No Grid, if you want the voting to be completely anonymous. Again, no need to set up the answers.

The Answer Grid option is used for Elections, where you will need to type the names of the Candidates, or any other answer choices that are not Yes/No/Abstain.

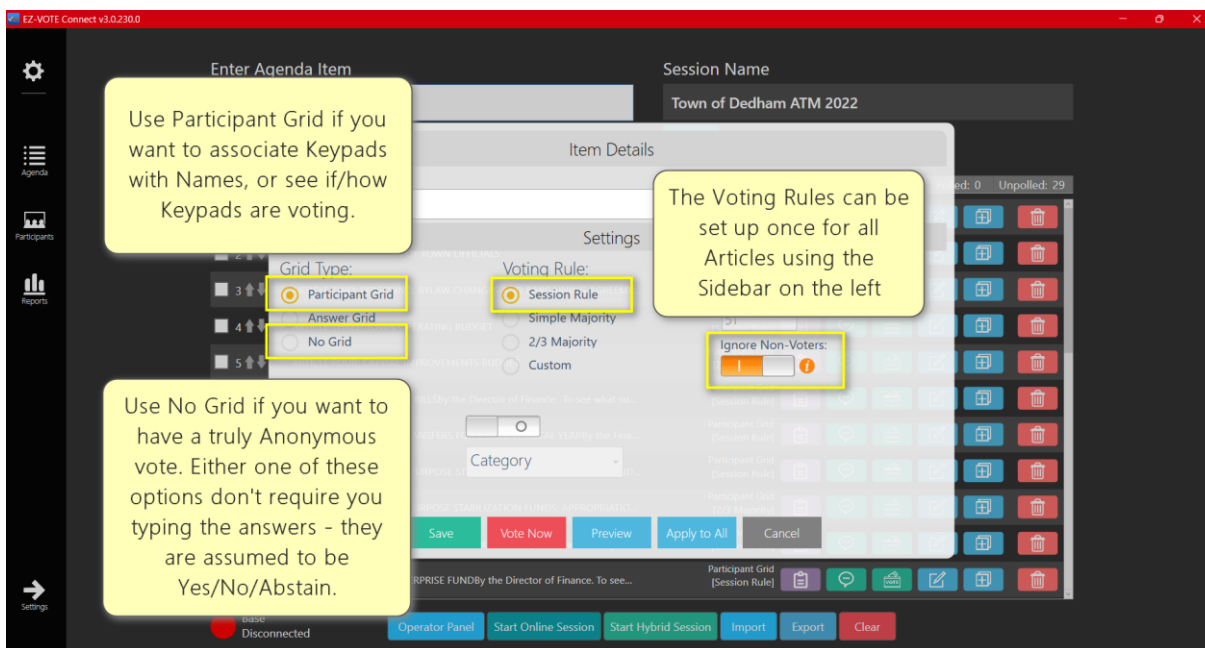


Figure 7 - Item Details screen lets you set up your Grid Type and individual Voting Rules



PRE-VOTE SCREEN

Right in the **Topic List**, you can edit, reorder and delete the upcoming topics to ensure the correctness of reporting. Feel free to switch back-and-forth between pre-defined **Topic List** and the **Ad-Hoc Polling**, and ‘open the floor’ to questions using the **Speakers Queue** feature.

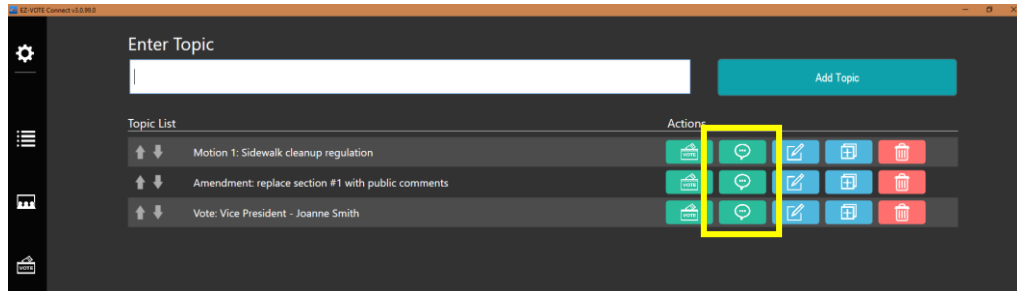


Figure 8 - Edit, Duplicate, or Delete your Topics easily from here.

On the Pre-Vote screen, you will find the ability to record who made the motion and the second. You can utilize the Speaker Queue where you’ll see who wants to speak in favor or against the motion, or just has a question or a comment. The participants can press 1 on their keypad to speak in favor, press 2 to speak against, or press 3 to just comment.

The Pre-Vote screen also has a space for notes that will be recorded and reported on in the final reports. Speaker Timer allows the Operator to start/stop/reset the timer for each speaker, and even change the duration of the countdown clock in between speakers.

Finally, when the debate is over, Operator can record a voice vote and just press the red X in the upper-left corner to go back to the Agenda page, or record an electronic vote as the natural next step in the meeting process.

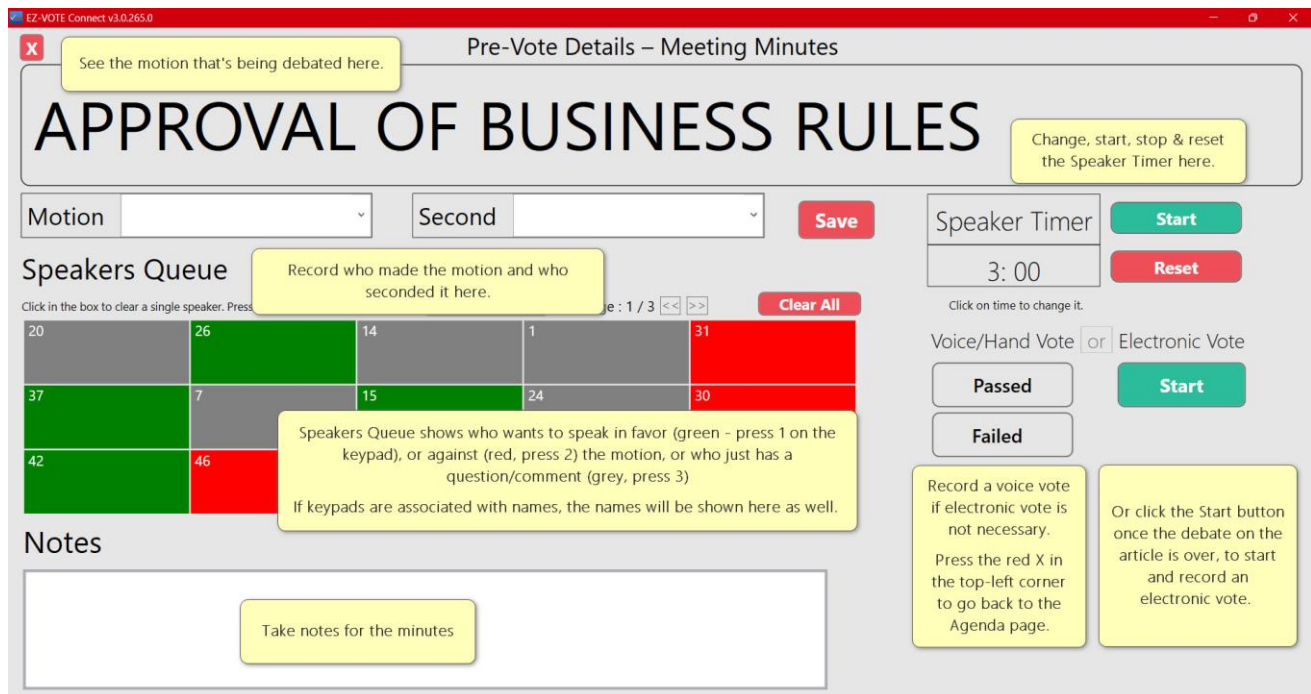


Figure 9 – Pre-Vote screen offers Speakers Queue, Notes, Speaker Timer, recording of a voice vote, or an electronic vote.



PARTICIPANT LIST

To start the polling session, you'll need to create, or import a Participant List (PL). Head over to the **Participant List** page to do that. You can set up an Offline Participant List with Anonymous or Identifiable participants, or an Online Participant List that (optionally) supports offline voting (clickers) in a hybrid session.

OFFLINE PARTICIPANTS - ANONYMOUS

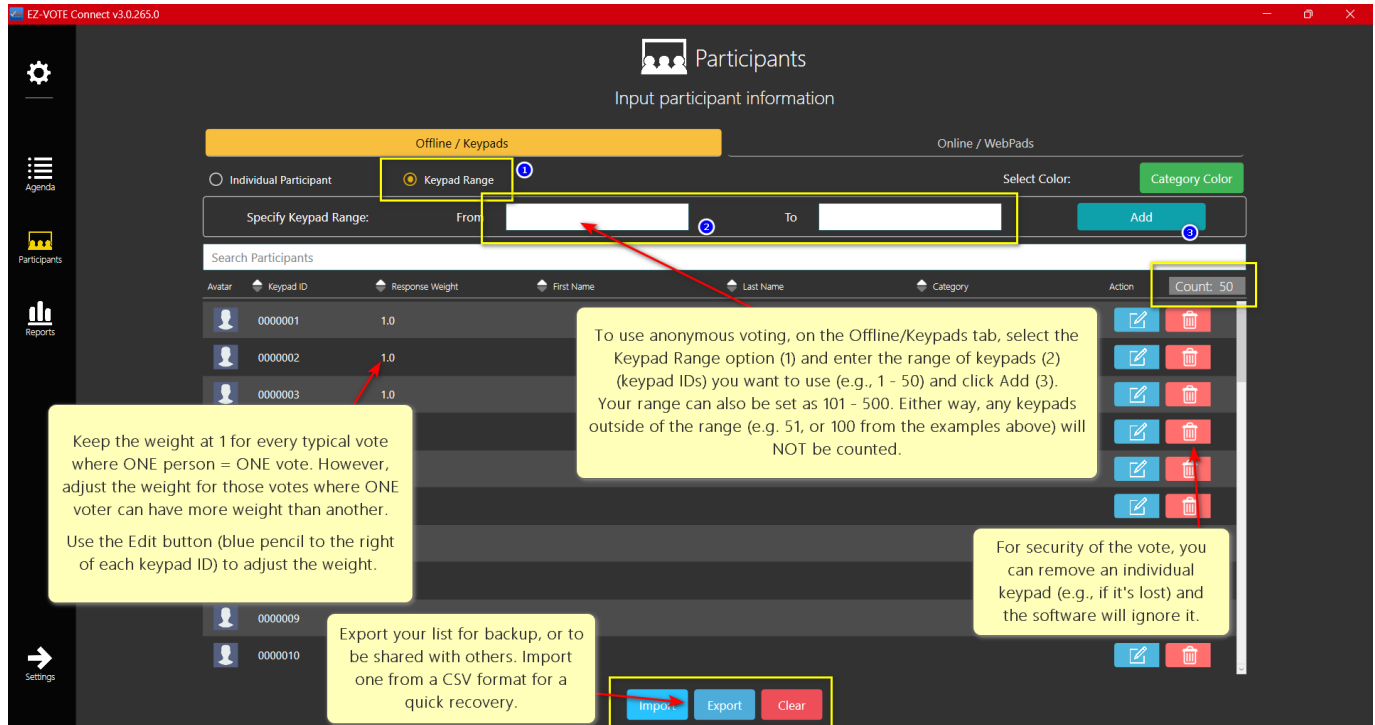


Figure 10 – Offline/Keypad Participants can be anonymous, or identifiable.

Anonymous participants can be entered using the Keypad Range option. Specify the range of 1 – 50, or 101 – 500, or any other sequential order. Only keypads in that range will register when voting is open. This is a security feature that prevents any keypad outside the range from voting in your session.

Typically, when voting in a standard business session, ONE person = ONE vote, but if your voting session requires ‘weighted voting’, you can adjust the weight of each vote by clicking the blue pencil icon (Edit button), or importing the custom weights using the CSV import file.

TIP: Import from a simple CSV file with the field structure: Keypad ID, Weight, First, Last. Please note that the file doesn't have to have column headers.

```

1,1,Aida,Alvarez,
2,1,Karen,Weber,
3,1,Jacqueline,Summers,
4,1,Lynda,Hilton,
5,1,Rudy,John,

```



OFFLINE PARTICIPANTS - IDENTIFIABLE

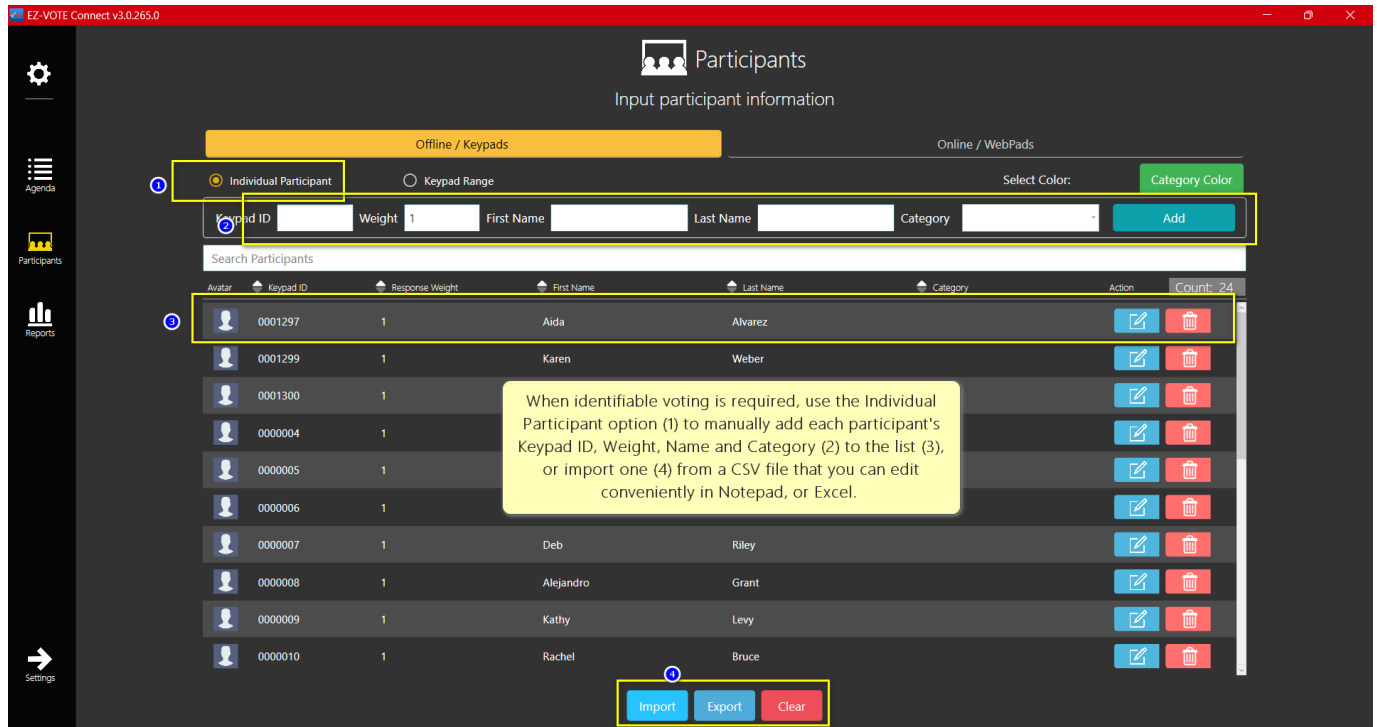


Figure 11 - If Identifiable voting is required, participants' names can be shown on the Voting Screen.

Identifiable Participant List can be set up manually using the Keypad ID, Weight and Name fields at the top of the screen, or by importing a finished list using a CSV file and the Import button at the bottom. Exporting your finished list is also a great way to save a backup file and/or sharing it with others for a quick import/recovery on a different computer.

TIP: Again, to restrict a keypad from voting, simply remove it from the list to maintain integrity of the vote.



ONLINE PARTICIPANTS

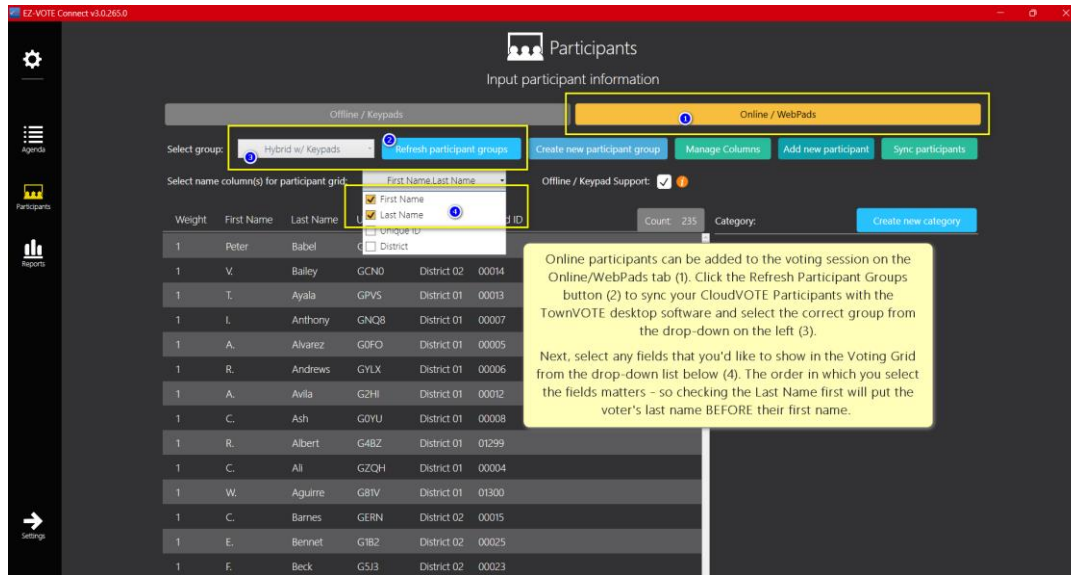


Figure 12 - Online participants can be added to have an online-only session, or add them to a hybrid session where their votes are added to the keypad votes.

Online participants can be added to the session either in a pure online session (everyone is voting remotely), or they can be added to an existing (offline) participant list of keypads, so that everyone votes at the same time.

Meridia does not provide any audio-visual tools to conduct your online/hybrid session, so feel free to use MS Teams, WebEx, Zoom, or another app to allow the remote participants to see and hear what’s going on in the meeting, so that they can participate in the meeting debate.

During the online vote, the remote participants will see the content (text of the vote) on their own devices and will be able to choose among the same options as the offline (in-person) participants.



AD-HOC MOTIONS/VOTING

If your voting session is not scripted and you don't know what topics will come up for vote, you can simply add an article/motion on the fly, using the white text box at the top of the Agenda page, click Add Item and after setting up the rules and type of display, click the Vote Now button.

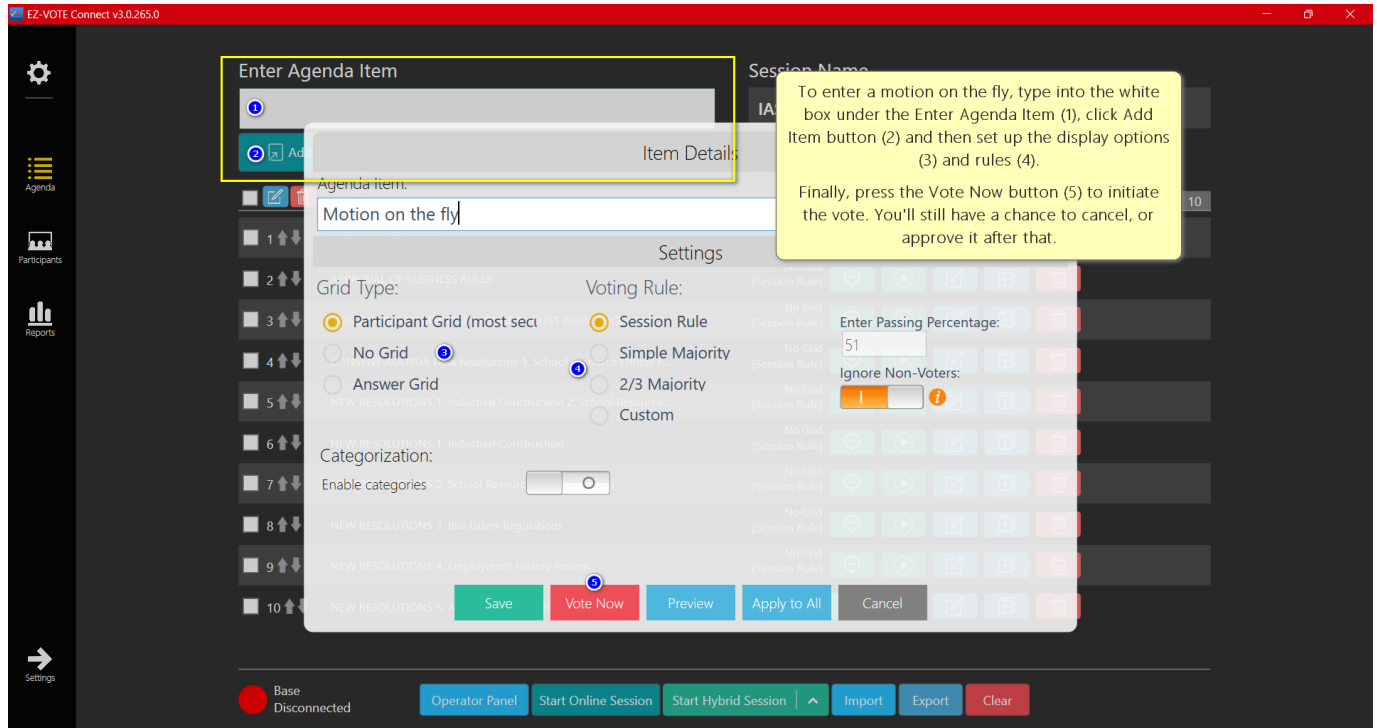


Figure 13 - Setup an Ad-Hoc vote within seconds.



VOTING DISPLAY

IDENTIFIABLE VOTING DISPLAY

If desired, TownVOTE can provide the voting results with the indicator of how each individual voted. By default, DURING the vote, you will only see THAT/IF the voter voted, and the TOTAL number of votes received.

Only AFTER the vote is closed, the individual vote value (Yes/No/Abstain) will be revealed along with the subtotals of Yes, No, and Abstain votes.

There’s also an option to suppress the individual vote value after the vote, so that it is never revealed HOW each voter voted.

The Voting Display can be customized in many ways, including the size (rows x columns) of the grid and the size of the Motion/Article text and its position.

The Status Bar just below the Total/Subtotal display is a color-coded indicator of whether the vote passed or failed, depending on the quantum of votes defined for the current vote.

TIP: Press ESC to access the Settings Panel and customize the Participant Grid display. Hover over the “I” icons to learn more about each setting and option.

TIP: When using the Participant Grid that doesn’t (cannot) show all the participants at once, navigate from one page (of names or keypad numbers) to another by pressing the right or left arrow (← or →).



Figure 14 - Identifiable Voting Display show the names associated with the Keypads in your Participant List.



ANONYMOUS VOTING DISPLAY

If you need to vote anonymously, you would set up your Participant List as a keypad range, without association of the keypads and voters' names, and then use the No Grid visual display.

There's also an option to use the Identifiable Participant List, but whenever needed, turn on the Anonymous Mode from the Sidebar Settings, and you will be forced to No Grid visual display by default.

In this mode, the article/motion text size can be displayed in the biggest possible manner by dragging the dotted line at the border between the text and the Yes/No/Abstain/Total block.

The subtotals are also displayed in large, bold text so that everyone can see them clearly on the projected screen.

TIP: Press ESC to access the Settings Panel and customize the No Grid display. Hover over the "I" icons to learn more about each setting and option.

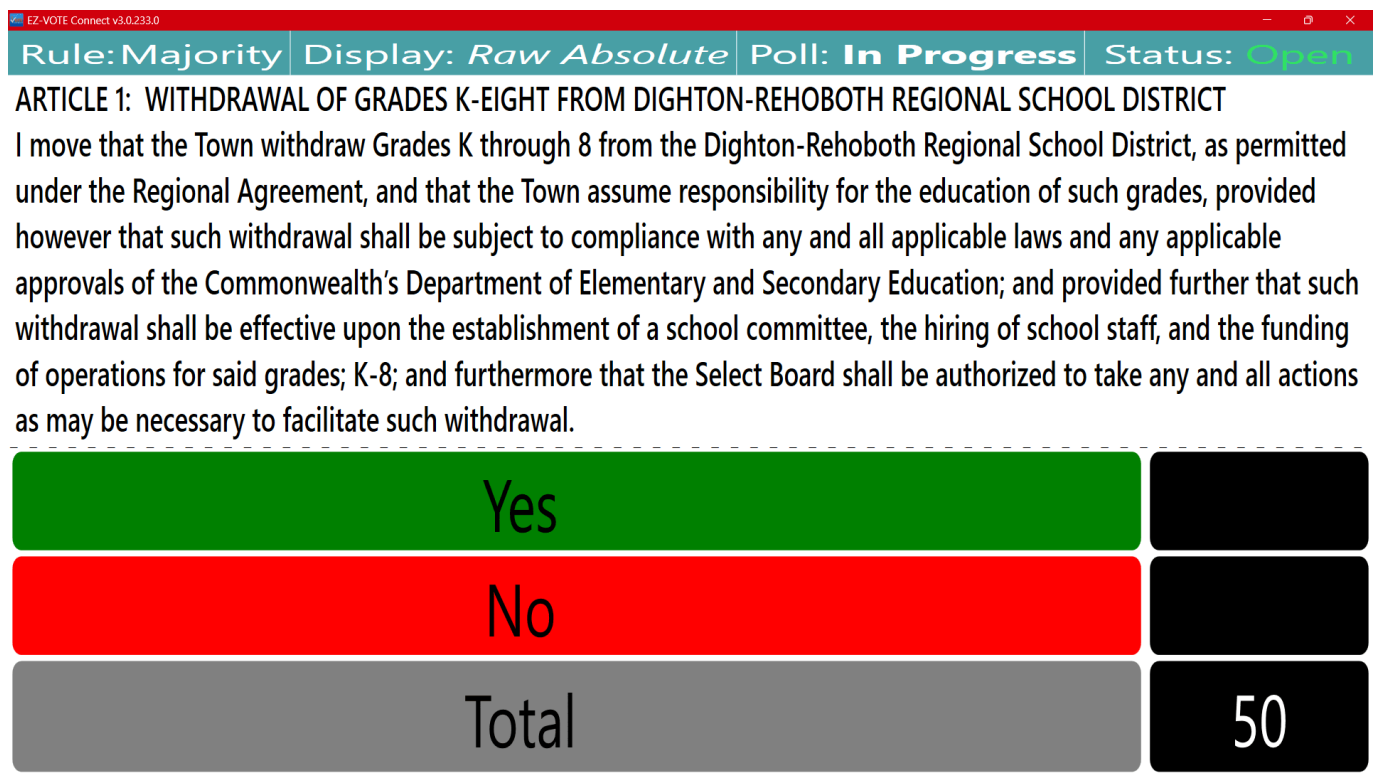


Figure 15 - Anonymous No Grid display shows only the motion/article text and subtotals and total of received votes.



ELECTIONS DISPLAY

During an election vote, using the Answer Grid display option, you can show up to 99 names on a single screen by configuring the grid size to fit your display size and other needs.

When displaying voting options other than Yes/No/Abstain, the voting options are shown to the audience, so when they press 1 on their keypad, they’re not voting Yes; instead they’re voting for the first option shown on the screen.

If more than 10 answers are required, you should be using our 10-button keypad, such as EZ-VOTE 10 so that the voters have the easiest possible time voting. If the voter needs to choose an item #11 or higher, they will press the double-digit number they chose and then press “Send” (the paper plane) button on the keypad.

TIP: Press ESC to access the Settings Panel and customize the Answer Grid display. Hover over the “I” icons to learn more about each setting and option.

PROVINCIAL WOMEN'S BOARD - WESTERN REGION (Vote for up to 1)		Total: 100
1	Teresa Holzhueeter	39
2	Jan Russell	30
2	Nancy Chandler	31

Figure 16 - Answer Grid option lends itself to voting for candidates in an election, or other items that need to be listed instead of Yes/No/Abstain.

BASIC OPERATIONS

Start the vote by clicking the Vote Now (Play) button on the Action Bar next to the article you need to start voting on. Confirm the intention by clicking the Open Vote button again. If you initiate the vote, but press ESC afterward, the Open Vote confirmation will be dismissed. You’ll need to open the vote by pressing Spacebar.

Once the voting is over, initiate the Close Vote by pressing Spacebar again and confirm by clicking Close Vote or pressing Enter.

Once the voting results are reviewed, press Spacebar again to return to the Agenda page.



SUMMARY OF KEYBOARD SHORTCUTS

- CTRL + P: Toggle between Percentage and Absolute Votes
- CTRL + A: Toggle Names ON/OFF
- CTRL + W: Toggle between Weighted and Raw Data
- CTRL + T: Toggle Yes/No Subtotals ON/OFF
- CTRL + G: Toggle Show Vote Value ON/OFF
- CTRL + C: Clear Data (prompt)

