

and its Modules

Presentation to the AMCTO Zone 3 Municipalities

April 12, 2018





The Election Event Dashboard

Online Voter Services

Voter Registration

Election Worker Management/Portal

VoterView Express

Candidate Portal



Election tools available:

VoterView

an elector management system providing election officials with an electronic view of their Voters' List and the capability to make changes

Modules:

Online Voter Services (formerly IVL)

allows electors to determine if they are on the Voters' List directly from the Municipality's website

provides an option for electors to register online to have their name

Voter Registration

allows candidates to view real-time data for eligible electors via a basic search capability

VoterView Express

Candidate Portal

(formerly Mobile)

a windows-based application that can be installed onto any laptop or desktop to support electronic voter strike-off

Election Workers

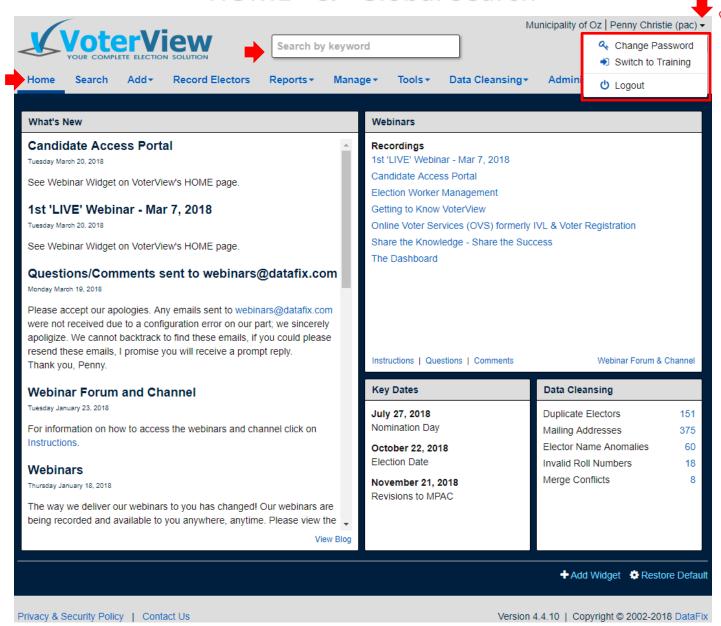
this module provides the functionality necessary to manage election workers and staffing requirements, including an online application and integrated quiz functionality

Election Event

helps the Municipality manage and monitor in real-time all of the key **Dashboard** activities of your electoral event and provides 2-way communication between the voting locations and the Municipal Office **DataFix**

added to the Voters' List

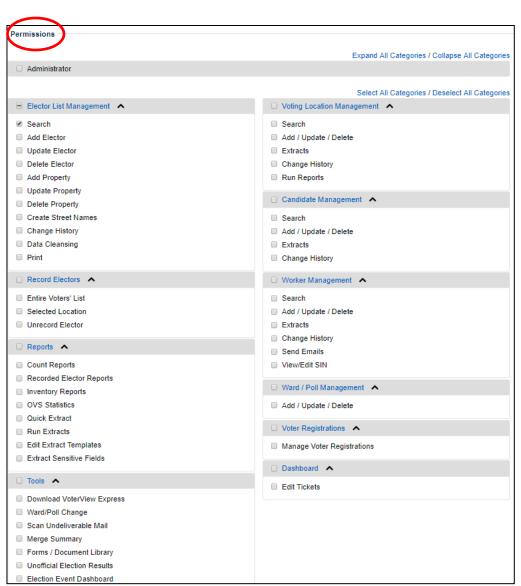
'HOME' & 'Global Search'





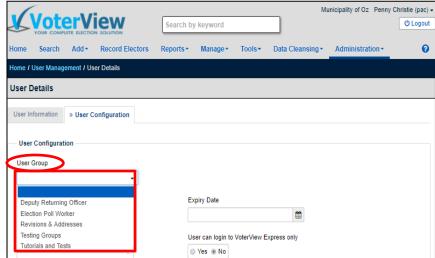


User Management



After creating the User ID, assign the individual **Permissions** to that user, or, assign the user to a **User Group** you previously created; here they will automatically adopt the permissions you've assigned to that group.





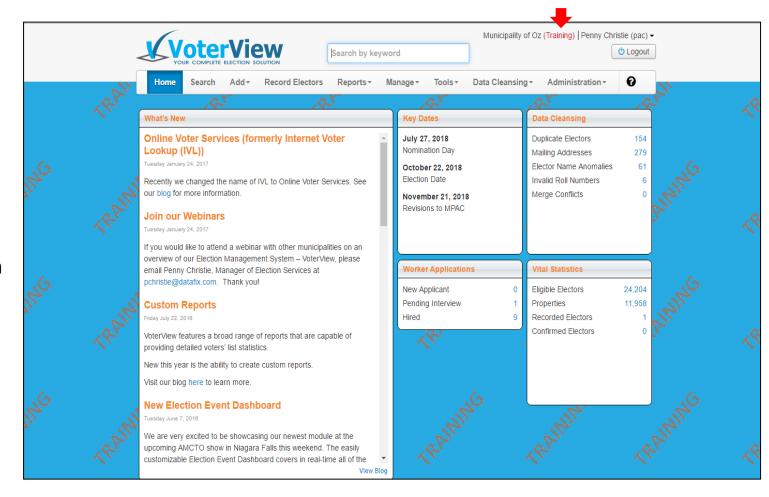




Training Database

The **Training Database** is a separate database and any actions performed <u>do not affect</u> the Production Database in any way.

The Home Page and all subsequent screens show a blue border with the words 'TRAINING' to indicate that you are now working in the Training Database and not in the Production Database.







Data Cleansing

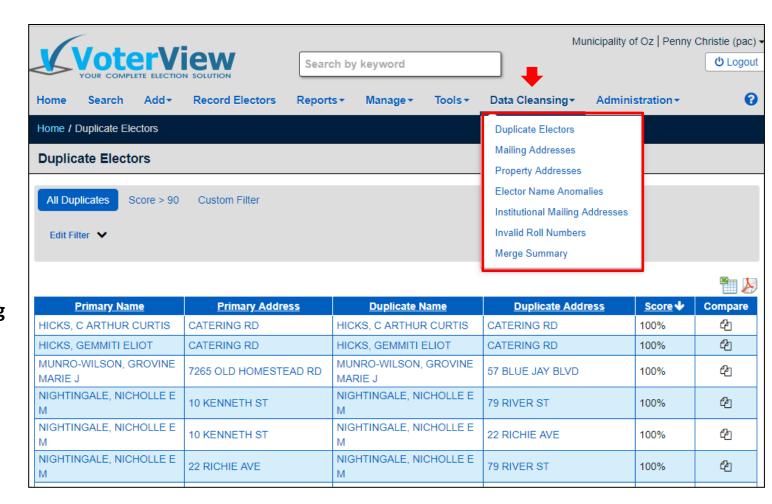
Helps you to identify and correct any possible errors with the Voters' List as well as maintain the data integrity of the List.

Remove duplicate electors.

Correct elector name anomalies.

Standardize your street index.

Cleanse mailing addresses according to Canada Post standards to achieve the maximum postage discount.







Elector Details Screen

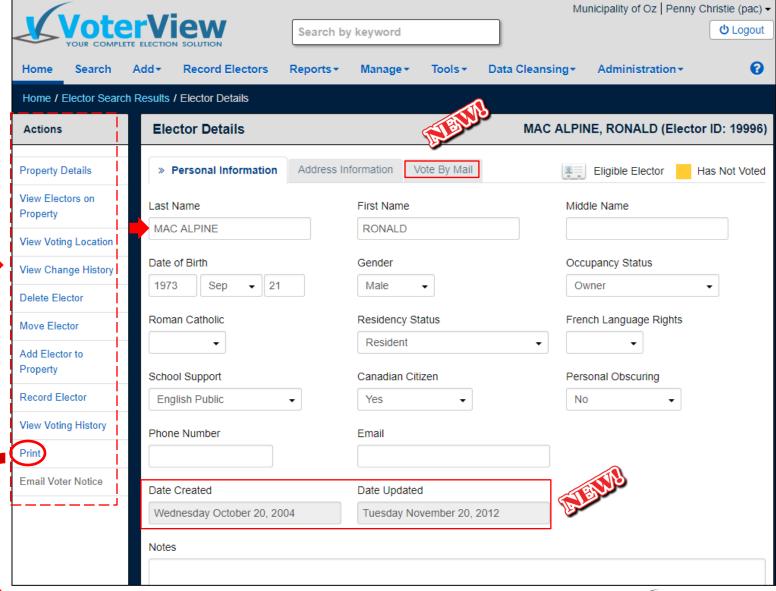
A powerful screen in VoterView!

You can do all these actions with this elector from 1 screen!

Vote-by-Mail:

DataFix

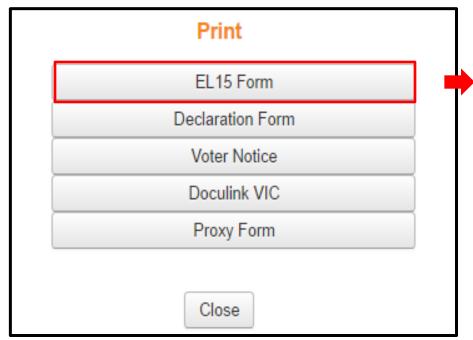
Now you can keep track of VBM kits requested, mailed and received!





cont. from the Elector Details screen

Click 'Print' on the Elector Details screen brings you to the 'Print' popup. Example # 1



Selecting one of the above options will display the pre-populated form with the elector's information; you can print or send to the elector via email; side example, the **EL15 Form**.

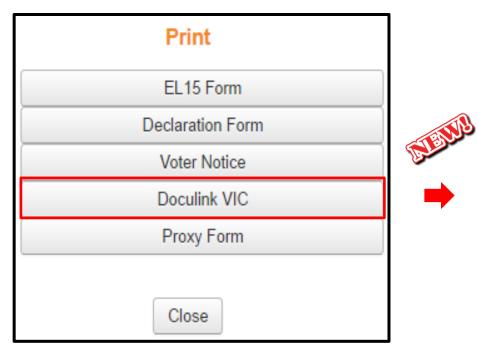
APPLICATION TO AME DEMANDE DE CHANGE Manigul Florian AU, 1986 (LT), CEL, CE	MENT À LA	Form/Formulaire EL15								
Manisipal Elections Aut, 1996 (s.17, s.24, s.25) Les de 1996 sur les dischem manispales (s.s. 17, sr.24, ast.25) Check only one / Cocher one came del applicant's name to list i ajouter le nom du demandeur à la liste										
correct applicant's information	tion on list/cor	riger les teracigne	ments sur le demande							
delete applicant's or family member's name from list / supprimer le demandeur ou le membre de sa famille de la liste deceased / décédé moved / décéde other / autre										
Please confirm that you are a Veuillez confirmer si yous êt MAC ALPINE	Canadian Ci es citoyen can	RONALD		Date of birth Date de naissance Vant/Annie Month/blois Day/lour						
Last name/ Nom de fa	31-		e / Prénom	Middle name / Prénom						
Last name/ Nom de ti	mue	rint nam	e / Frenom	Middle name / Frenom						
Qualifying address on voting	g day					At qualifying address, applicant is:				
Adresse admissible le jour d	es élections	1			A l'adi	resse admissible, le demandeur est:				
1001 BARTON AVE	l	000800012	2604000000	401	04	propriétaire depuis				
Street number & name	Apt. # N°. d'app.	Roll number	200400000	Voting subdivision	Ward	locataire depuis				
Numéro et nom de rue	Nº. d'app.	Nº, du role		Section de	Salle	other since				
				vote		chambeeur depuis spouse/conjoint(e)				
	l	l				unqualified (deleted name only)				
						non qualifié (non supprimé soulement)				
City Ville	Postal code Code postal	(of house apartment (si app. dans la mai	, indicate floor level-e.g ison, indiquer l'étage)	, basement, I* Sc	sor, etc.)					
Previous applifying address	(if amplicable)					At previous address, applicant was:				
Adresse admissible précéder	tte (si tel est le	car)			À l'adre	sse précédente, le demandeur était:				
						owner / propriétaire tenant / locataire other / chambreur spouse/conjoint(e)				
Street number & name						other/chambreur				
Numéro et nom de nue	Apt.# Nº. d'app.	Roll number N°, de role		Voting subdivision	Ward Salle	spouse/conjoint(e)				
				Section de vote						
						1				
City	Postal code		, indicate floor level-e.g							
Ville	Code postal		ison, indiquer l'étage)	, basement, 1" b.	ear, etc.)					
Current mailing address of	annlicant.	67 Allerent des	qualifying address a	abanci.		At mailing address, applicant is:				
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						owner/propriétaire				
			1.45.050		other/chambreur					
1001 BARTON AV	RR 2	KESWICK	L4P 3E9		owner / propriétaire ternant / locataire other / chambreur spousséconjonn(e)					
Numéro et nom de nue				Code postal						
School Support / Soutien see										
Applicant is Roman Cat Le demandeur est catho	holic									
Applicant has French L.	anguage Educat	ion Rights (does n	ot include French im	mersion nor Fre	mch as a so	cond language)				
Le demandeur a druit à	Penseignement	en langue françai	se (n'inclut pas les po	ogrammes d'imi	mension ou	de français langue seconde)				
Applicant wishes to be an el										
Le demandeur désire être un English-Public anyone co			nivant:	English-Sep	arate must	t be a Roman Catholic				
Public anglais toutes les	personnes sont a	dmissibles		Séparé angl	ais scules l	t be a Roman Catholic les personnes catholiques				
☐ French-Public must have	French Langua	ge Education Right		French-Sept	arate must	be Roman Catholic and have French				
Public français scules les langue française	personnes ayan	t droit à l'enseigne	ment en	Language Re Séparé fran	fucation Ri	les nervouses catholicaes avant droit				
				à l'enecigner	nent en lan	ghts les personnes catholiques ayant droit gue française				
Little undersigned, benefit dealers that I are	a Canadian citizen,	that I have altered the a	ge of righten (1) years or							
I, the undersigned, brothy doclars that I am a Canadian citizen, that I have attained the age of eighteen (15) years on or before Varing Day, and that on Voting Day, I am estable to be an elector in accordance with the five or information submitted on this time, and that I understand the effect thereof. I having apply to have my man or included an accordance made on the Voter's List in accordance with such fields or differentiates. As unsupporty, declare the only only in particular, and a series attend T gas de dischait (15) and is now an accordance who continued on according to mix admirable to be not be the set of the continued of the continued of the continued on the continued of the contin										
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sonorignaments.						09-Mar-2017				
Signature of applicant / Sign	nature du dese	andear				D9-IVIAIT-2U I /				
Certificate of Approval (to b	Certificate of Approval (to be completed by Clerk or designate) Certificat d'approbation (à être complèté par le greffier ou la personne désignée) Refused (state reason)									
	it completed by	on to another and	a management different							
Approved / Approuvé	être complété p	ur le greffier ou l	a personne désigné	e)	L	Refused (state reason) Rejeté (précisez la raison)				
Approved / Approuvé	être complété p	ur le greffier ou l	la personne désigné		ith the	Rejeté (précisez la raison)				
Approved / Approuvé	être complété p	ur le greffier ou l	la personne désigné		ith the _	Refused (state reason) Rejeté (précisez la raison)				
Approved / Approuvé I haveby certify that the Voters' Lisa: statement of facts or inflormation com le diclare que la liste électorale pour renseignements déclarés ci-haut	être complété p	ur le greffier ou l	la personne désigné		ith the	Rejeté (précisez la raison)				
Approved / Approaré I hereby certify that the Voters' List is statement of facts or information con le déclare que la little diectorale pour renseignements déclarés ci-baut	être complété p for said voting sub- nimed heroir. In dite section de v	ur le greffier ou l division in this munic rote de cette municipe	la personne désigné ipalny shali be amendeé alité sets amendée selon	d in accordance w les faits et 09-te	lar-2017 T	Refused (state reason) Rejeté (précisez la raison)				
Approved / Approuvé	être complété p for said voting sub- nimed heroin. la dite section de v Signature du gre	ur le greffier ou l division in this municipa rote de cette municipa ffier ou de la perso	la personne désigné ipality shall be amende alté sets amendée selon mue désignée	d in accordance w les faits et 00-M date	tar-2017	Refused (state reason) Rejeté (précisez la rasson)				



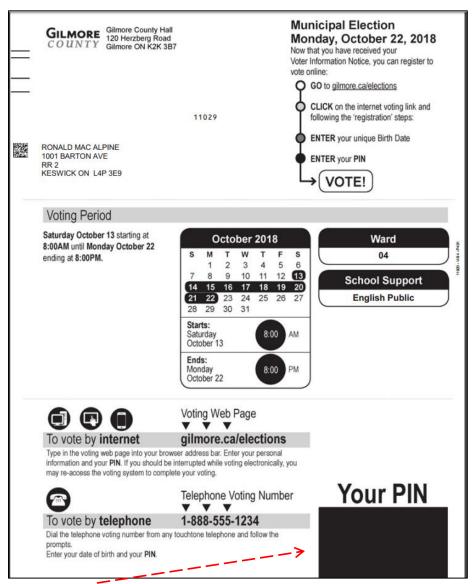


Example #2 is applicable only for Municipalities who use Doculink

Click 'Print' on the Elector Details screen brings you to the 'Print' popup. Example # 2



Every eligible elector in the Municipality has a **VIC**PDF *(Voter Identification Card)* hosted on the
Doculink portal; this allows Municipalities to see an
exact copy of what was mailed to each elector; using



Online Voting in this example, you'll see a box on the PDF for a PIN, this box has been blacked-out for security reasons, ensuring no one can cast a vote for another elector.



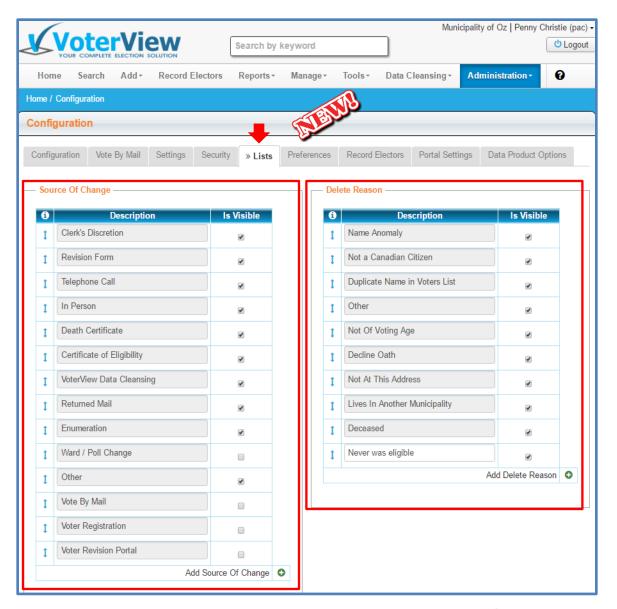


'Source of Change' and 'Delete Reason' Lists

Customize your own lists:

Source of Change and the Delete Reason lists.

Build your 'History of Changes' with meaningful reasons and sources defined by you.





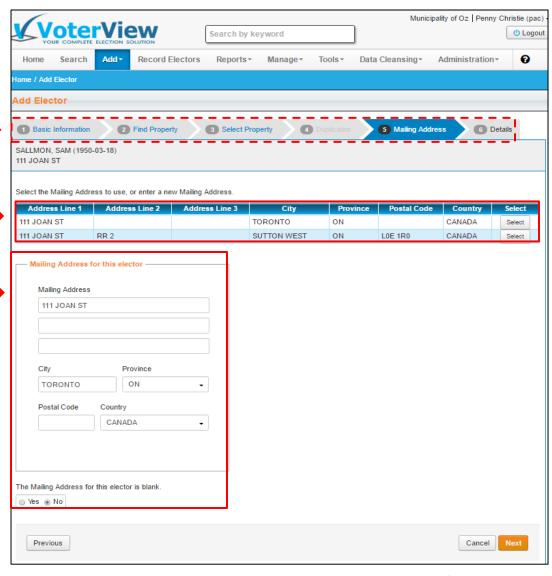


'ADD an Elector' Wizard

6-step wizard to add a new elector:

You now have the option of selecting a mailing address from existing voters on the property or adding a new mailing address for the elector.

Saves time keying!





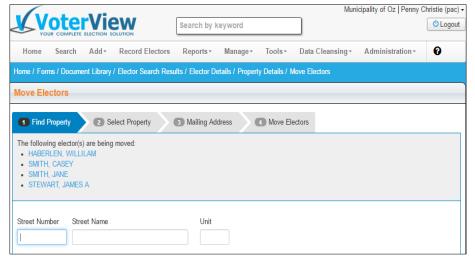


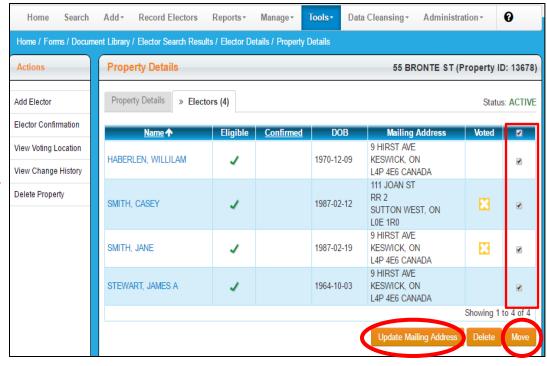
'Move' Elector(s) 4-step wizard!

Using the 4-step wizard for one or more electors, you can move them to another property, delete them, and now you have the option to change their mailing address, all in one step.



Example: 'Move' the electors





Action = 'Update Mailing Address'



Action = 'Move'



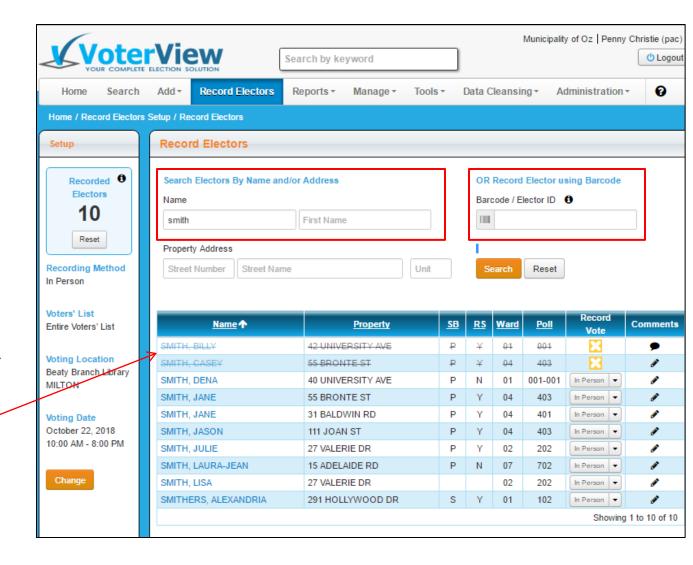


Record Electors

Real-time Electronic Voter Strike-off:

Search electors by name and/or address, or, record electors using barcode technology.

Once the elector has been recorded as voted, the elector will have a 'strike-through' their information on any future extracts and flagged with an 'X' throughout VoterView

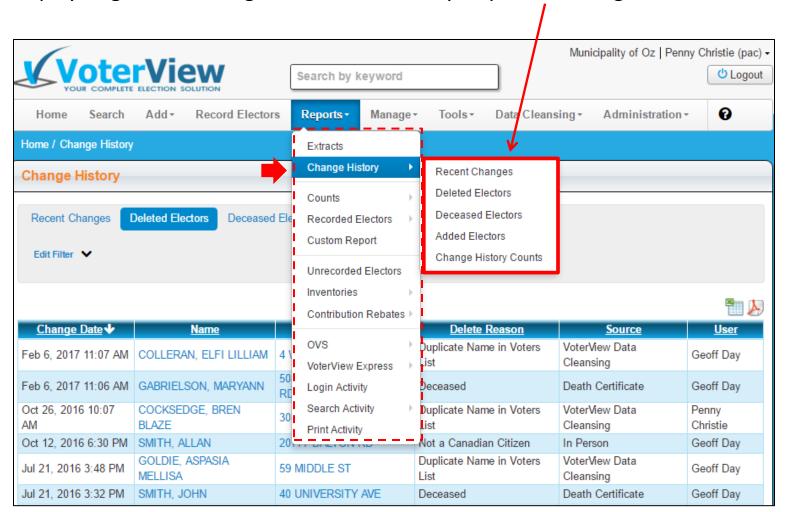






Change History

A complete inventory of all changes made in VoterView is maintained. The **Change History** screen displays a grid containing the most commonly requested changes.







Extracts

Extracts:

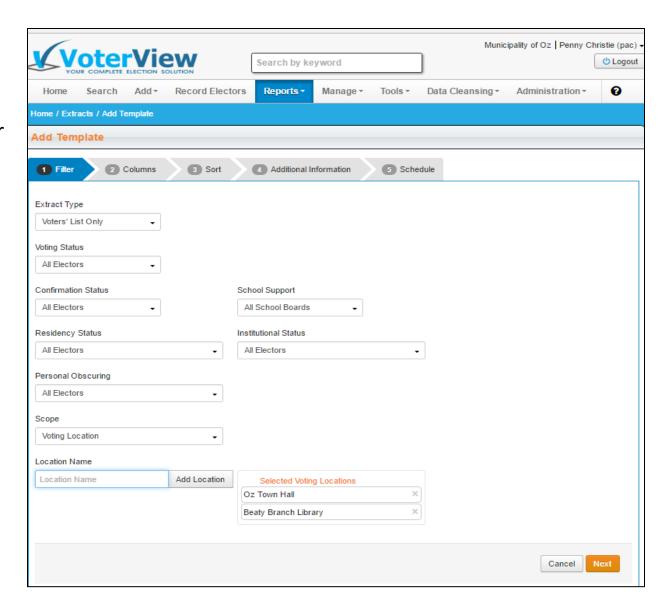
The extract facility can produce customizable elector list extracts and revision reports for on-demand printouts of elector information.

Allows you to:

Select your columns of information and the order of those columns.

Save and name extract templates for future use.

Schedule extracts to run automatically.



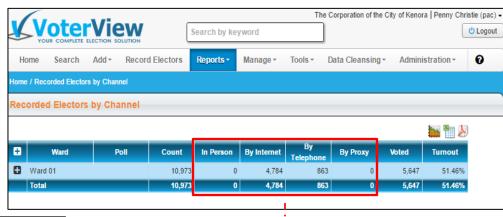


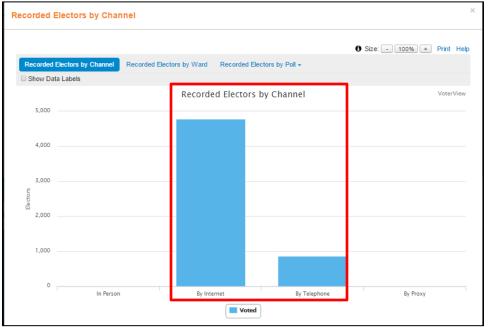


Reports in Chart Format and Graphs

Most reports in VoterView can be viewed/printed in chart format or as a graph.

Example: Recorded Electors by Channel





The above chart displays the channel, the method of voting, and for this example, 4,784 electors voted 'by Internet' and 863 electors voted 'by telephone'.





Custom Report



VoterView also includes a **Custom Report capability** where multivariate reports can be created. Examples of data available for analysis are, gender, residency status, school support, age, electoral district, ward/district/poll, occupancy status, voting channel and voting date/hour.

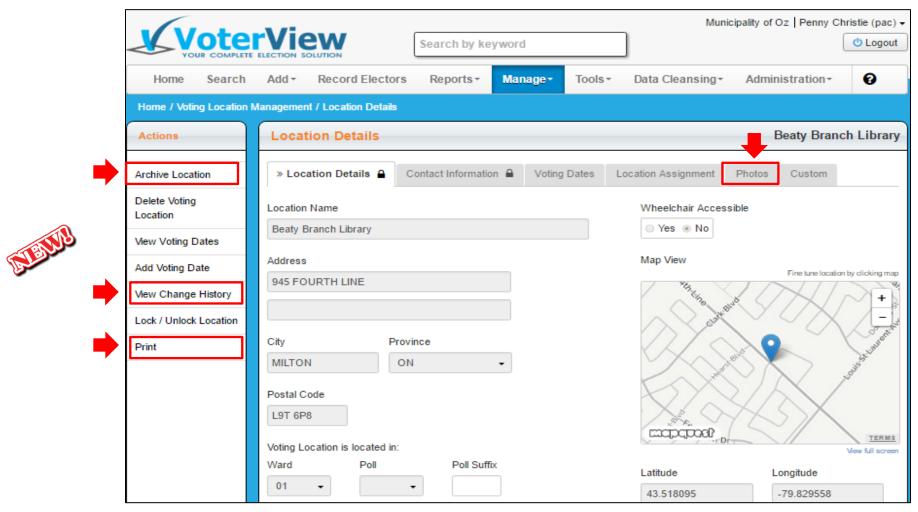
- (> c=		The Corporation of the City of Kenora Penny Christie (pac)								
VoterView YOUR COMPLETE ELECTION SOLUTION				Search by keyword							O Logout	
Home	Search	Add - Reco	rd Electors	Rep	oorts •	Manage +	Tools	; -	Data Cleansing •	Administration •	0	
Home / Cus	tom Report											
Custom I	Report											
Table	Y	Age v Age Group v Gender v Poll v Residency Status v School Support v Voting Date v Voting Hour v Voting Location Name v Vote Record By User v Ward v										
		Voted ▼ V	oting Channel	•								
Occupancy Status *			Voted	false		true						
			Voting Channel	null	By Internet	By Telephone	Totals					
		Occupancy Status										
	Boarder Owner Spouse		1,261	403	33	1,697						
				3,226	3,596	685	7,487					
				159	246	37	442					
	Tenant Totals			680	539	128	1,347					
				5,326	4,784	863	10,973					
Refresh	Export											
Kellesil	Ехроп											





Voting Location Management

VoterView provides the ability to manage the inventory of Advance and Election Day voting locations and to easily assign the associated electoral districts and polls to those locations.









Actions

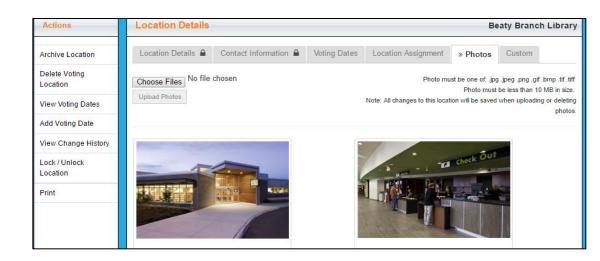
Archive: allows the municipality to archive a location and restore it at a later date

View Change view all changes made to this location, when and by who **History:**

allows the Municipality to print information about this location, such as, the location details, contact information, voting dates, district/ward/poll information, any photos or floor layout diagrams that were uploaded and any customized fields like a 'checklist' for this location

Location Details tab 'Photos':

Allowing municipalities the ability to upload photos and floorplans that will be helpful for Election Staff and Workers at the voting locations.



Individual locations can be classified as <u>both</u> Advance and Election Day (and Special Voting Opportunity SVO).

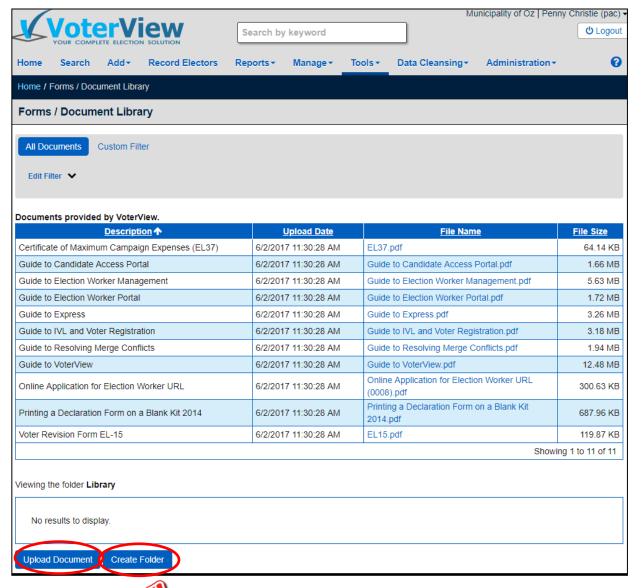


The Forms/Document
Library function is used
to access forms and
documents that have
been uploaded for use by
the Municipality.

You can now create directories to manage those documents.

You can also use this function to access **User Guides** provided for VoterView and its
Modules.

Forms/Document Library











Modules

Enhancing Your Election Experience

A look at our modules and introducing our new 'Dashboard' module!





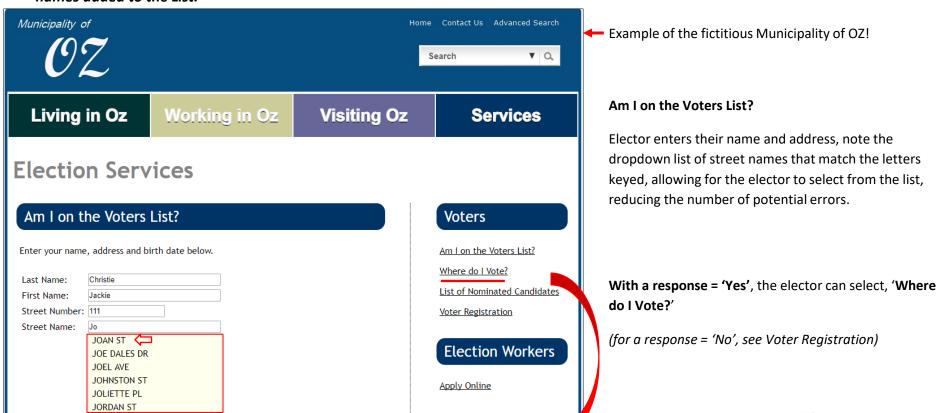
Online Voter Services

The Online Voter Services allows electors to determine if they are on the Voters' List directly from your election website as either a web service or an iframe implementation. Using the elector-supplied name and address information, the search request provides a positive or negative status indication for each request.

Provides three key functions:

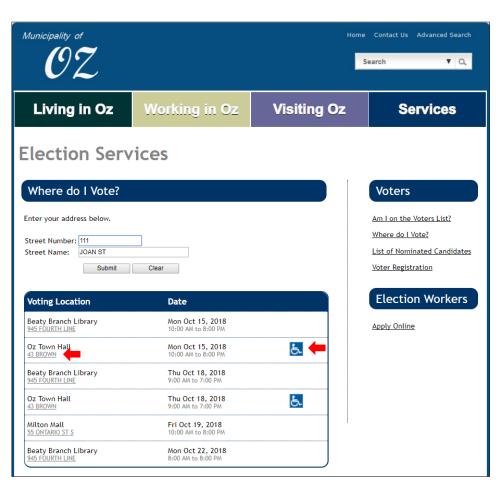
'Am I on the Voters' List?'

Electors enter their full name and property address and will receive either a positive or negative response. For negative responses, the voter will receive the messaging necessary to have their name added to the list. When the Voter Registration module is integrated with the Online Voter Services - those electors with a negative response can be directed to the online, self-serve option for having their names added to the List.



'Where do I Vote?'

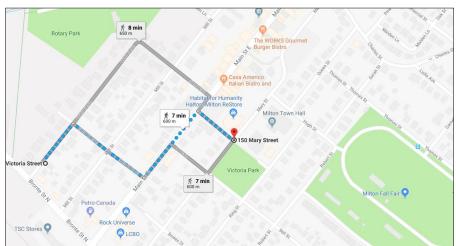
Based on either a successful 'Am I on the Voters' List?' search or by directly entering a property address, the 'Where do I Vote?' function will display the appropriate voting dates, times and locations applicable to the address entered. For customers that implement Vote-Anywhere, this can be configured to display the nearest voting locations to either the <u>elector's address or an elector-supplied postal code</u>. In addition, Google Maps links can be displayed to show both the map of the location of the voting place as well as directions from the elector's property to the voting location.



Your voting location information is automatically pulled from VoterView; if you make a change to a location in VoterView, this will immediately be reflected in 'Where do I Vote?'.

Note the 'wheelchair accessible' icon, this is an entry you've made in VoterView to identify which locations are wheelchair accessible.

The elector clicks the address link for a location, it will display where the Voting Location is located in relationship to their address, it also provides an option for directions from their address to the location as seen below





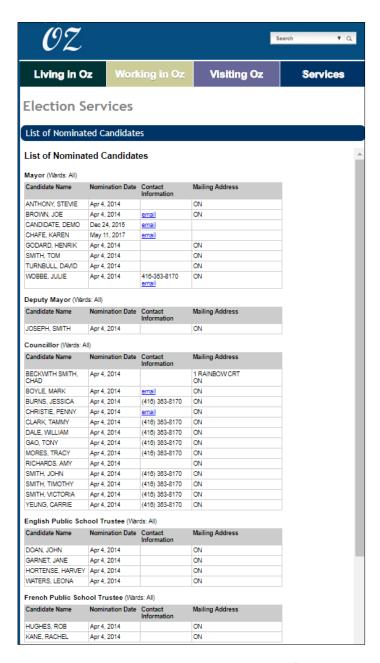


3. 'List of Nominated Candidates'

From #1 'Am I on the Voters' List?' or #2 'Where do I Vote?', when 'List of Nominated Candidates' is selected, this optional service provides a list of candidates applicable to the elector based on the supplied property address. Alternatively, sample ballot faces can be provided in the responses to, 'Am I on the Voters' List', or, 'Where do I Vote?' functions.

List of Nominated Candidates:

In VoterView, if you make a change to a candidate's information, it will automatically be reflected in 'Who are my Candidates?'





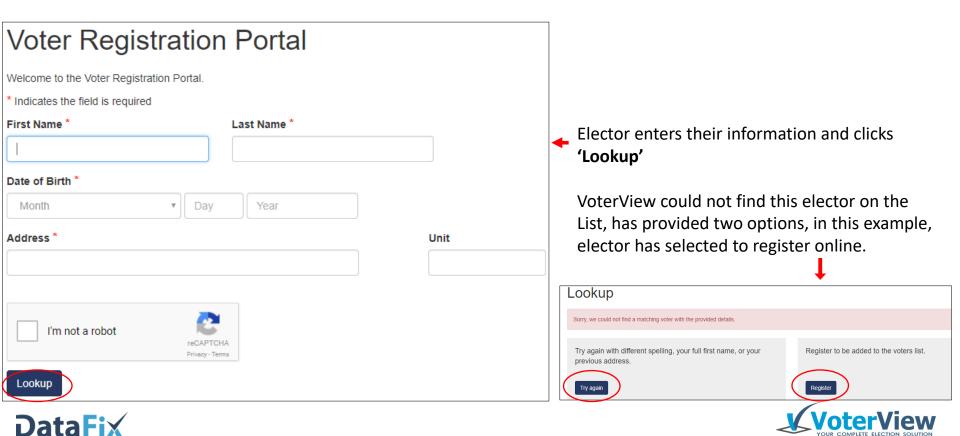


Voter Registration

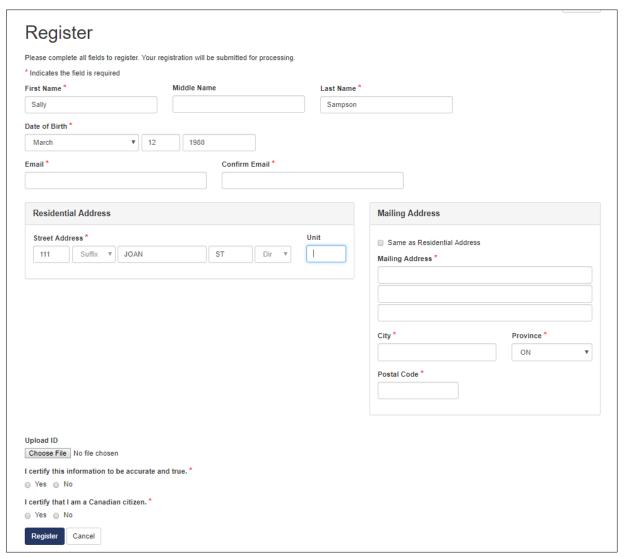
'Am I on the Voters' List?' Response = 'No', the elector has chosen to register online . . .

The **Voter Registration module** extends the Online Voter Services functionality by enabling electors to **register online to have their name added to the Voters' List.** Voter Registration captures online registration requests and automatically generates pre-populated Revision Forms, for example, an EL-15, that can be printed and signed by the prospective elector and brought to their voting location.

Registration requests submitted online are available for viewing in VoterView where Election officials can process the requests in order to add, decline, or request additional information from the registrant.



The Online Registration Form (example only)



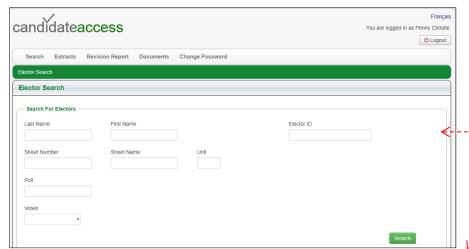
Registration requests submitted online are available for review in VoterView. There, election officials with the appropriate permissions can process the requests in order to add, decline, or request additional information from the registrant.





Candidate Access Portal

With the **Candidate Access Portal** candidates can view real-time data for eligible electors in their electoral district via a basic search capability. The municipality can upload documents or forms to the candidate's portal for them to download. The <u>Municipality has full control</u> over which information the candidate can view, as well as, whether or not the candidate can extract a Voters' or Revision List, and how often.



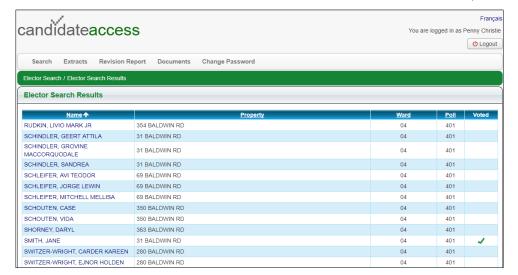
This is an example only, the customer decides what candidates can actually see or not and whether or not they can extract Revision Lists and if yes, how often. They have full control and decision making.

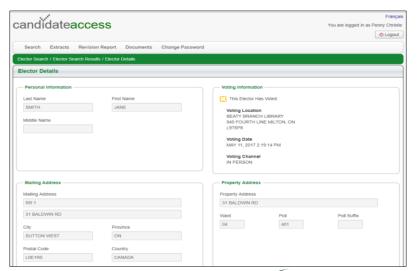
The Candidate can:

Step 1: Search for an elector name, property address or street.

Step 2: Elector Search Results – select elector to view details

Step 3: Elector details of when they voted, where and the method.









Election Worker Management (and Worker Portal)

The **Election Worker Management** module accepts applications online and manages workers throughout the election cycle. This module provides all the functionality necessary to manage election workers and staffing requirements:

- Design online application and test using a "WYSIWYG" editor; automatic 'scoring' of the online test for review by the Municipality
- Applicant status tracking for interviews, training, and work assignments
- Allocate election workers to voting locations and confirm staffing levels at each location
- Generate export files for election worker payments
- Automated email notifications, reminders, and alerts

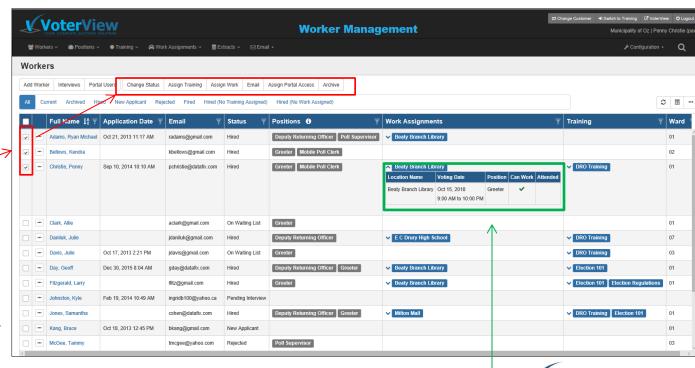
The Election Worker Management module also includes an **Election Worker Portal** that allows applicants to view their individual interview and training schedules and accept or decline work assignments. From their portal they can also download training materials and election documents.

Each user can customize their own HOME screen for Workers, Positions and Training: add columns, change the order or the columns and create a 'custom column' having the information displayed on the screen.

Can select one or more electors and apply the same filter, eg., assign training, send an email, etc.

Available filters: Column filters, filters at the top of the grid, can create, name and save Custom Filters to use again.

Can 'expand' **Work Assignments** or **Training** to view the dates below.





The Election Event 'Dashboard'

The easily customizable **Election Event Dashboard** covers in real-time all of the key activities of your electoral events and helps Election officials manage and monitor statistics in parallel to providing alerts.

During an electoral event, the **Dashboard** will display: **Real-time statistics** and alerts; **Monitor voting location** status; Highest and lowest **activity by voting location**; Current overall **vote rates**; **Potential issues** such as, voting locations not recording votes; View **turnout by ward** on a municipality map; Create, monitor, and **manage tickets**; **Monitor social media** feeds; **Tickets and Messaging** – 2-way communication between Voting Locations and the Municipal Office and **Chat.**

Screenshot view of a few of the many components available with the Dashboard:



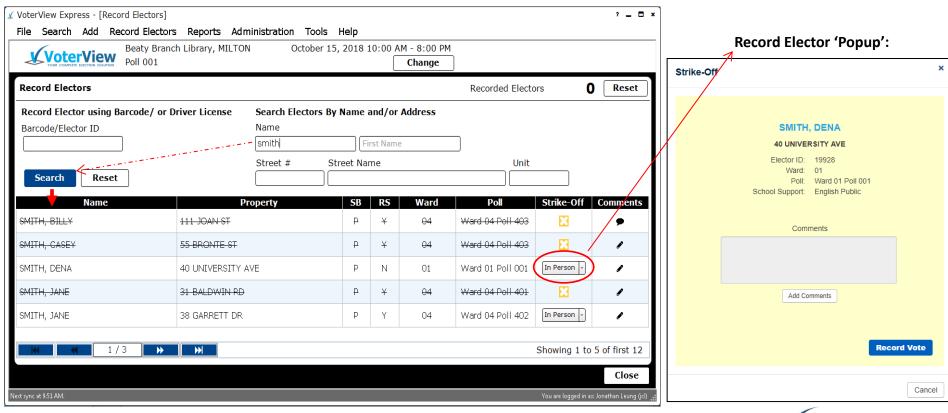




VoterView Express

VoterView Express is a Windows-based application that includes a local copy of the Voters' List in a strongly encrypted format. When Internet connectivity is available, **VoterView Express** will continuously synchronize voting location activities, strike-offs and revisions with the back-end VoterView servers. The synchronization methodology in **VoterView Express** is two-way, activity from the local device is pushed up the back-end servers, and activity from polling locations that was uploaded to those servers is pushed down. With **VoterView Express**, voting location activities can continue uninterrupted should Internet connectivity be lost. This functionality also permits the use of **VoterView Express** at Special Voting Opportunity (SVO) locations that may not have any Internet connectivity.

Functionality is the same with Express and Record Electors in VoterView but each have a different look so the user can easily differentiate between the two and be more aware of which application they are using.



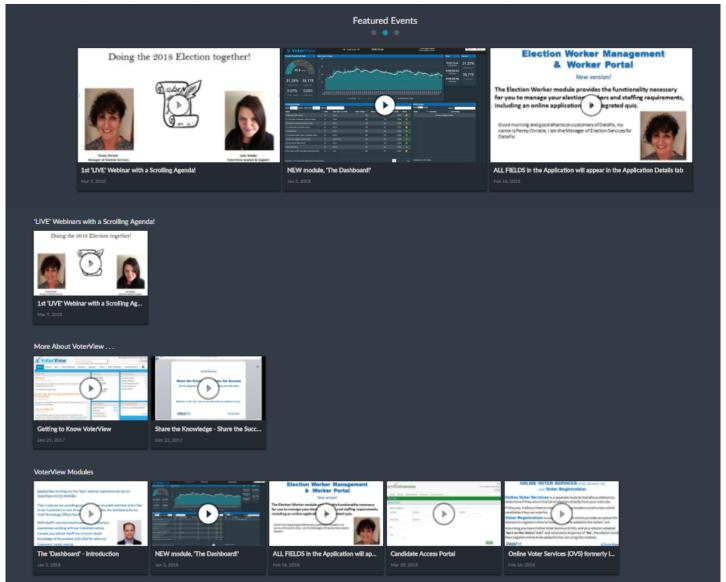




DataFix's Webinar Channel!

A new way we are delivering our webinars to you! Review them as many times as you like, whenever you like.

A perfect training tool: pause - quiz - continue; Your meeting Assistant: pause - discuss - continue - review.







Webinars for the 2018 Election!

Webinars Recorded?

Posted on Channel

Getting to Know VoterView

First-time users of VoterView

If you have never used VoterView, this webinar is for you! Come join us in our overview of VoterView and all the tools within; have an opportunity to ask questions, live demos and with our VoterView User Guides you will be well on your way!

Share the Knowledge – Share the Success

Posted on Channel

For the Beginner – the Election Schedule and VoterView

This webinar series provides an insight into a 'sample' 2018 Election Event Schedule and how a Municipality can use VoterView for all these events.

Online Voter Services (previously IVL) & Voter Registration

Posted on Channel

Online Voter Services: allows electors to determine if they are on the Voters' List directly from the Municipality's website; **Voter Registration:** provides an option for electors to register online to have their name added to the Voters' List

The Election Worker Module and Portal

Posted on Channel

We've listened to you! Based on your suggestions from 2014 and on, we have re-vamped this module to better suit your needs. It's easier, it flows, it has it all!

The Election Event Dashboard

Posted on Channel

Helps the Municipality manage and monitor in real-time all of the key activities of your electoral event and provides 2-way communication between the voting locations and the Municipal Office.

Electronic Voter Strike-Off Using VoterView and VoterView Express

Coming soon . . .

Using the electronic voter strike-off functionality in VoterView supports vote-anywhere and ensures that an elector casts a vote only once in the municipality; the service can also be enhanced to include a mobile strike-off version; this is referred to as **Express** which enables you to work in locations with limited or no Internet connectivity.

Candidate Access Portal

Posted on Channel

Allows candidates to view real-time data for eligible electors via a basic search capability.

Bells and Whistles of VoterView!

Coming soon . . .

For the Advanced User

We've been busy! Join us for a webinar on all the new bells and whistles of VoterView. What's changed? What's better? What's been added? We have made improvements to VoterView since 2014, but watch, this webinar is intended for the experienced user!

'Sneak Peek' on how they use VoterView

Coming soon . . .

'They' being another Municipality; on how a few of the municipalities use VoterView as a one-stop Election tool!

'LIVE' Webinars: 1st one is now Posted on the Channel and more to come!

Posted on Channel



Thank you!

Questions?



For more information please contact:

Penny Christie
Manager/Trainer of Election Services
416 363-8170 ext. 318
pchristie@datafix.com

For information regarding DataFix, please go to www.datafix.com



