

Board Elections Made Easy with an iMIS-Integrated ElectionsOnline

Presented by:

Association Technology Solutions
ElectionsOnline



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 Authorized iMIS Solution Provider (AiSP) of the Year

Hosted by



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org

About ElectionsOnline

- Founded in 2002
- 350+ clients from a variety of sectors and sizes, though primarily membership associations
- Distinguished by:
 - Innovation in product development
 - Expertise and research in usability
- More at www.electionsonline.com

Evote Intro

- Evote supports:
 - Voting on positions with candidate biographies and photos
 - Voting on referendum and/or bylaw changes
 - Mobile-friendly ballots
 - Personalized ballots based on voter profile
 - Ballot weighting
 - Multilingual ballots
 - Voter comments
 - Group accounts
 - Much more explained at www.electionsonline.com/online-voting-system

Evote Hosting Options

- **Fully hosted** where everything is hosted at the ElectionsOnline website and voters go there to both login and vote
- **Passed authentication** where voters login at the client's website, then are passed over to the ElectionsOnline website where they access and cast their ballot
- **SOAP-based web services** where the ballot is consumed into a client's website so the entire process from logging in, to casting a ballot, is done at the client's site. Ballot setup and accessing results is done at the ElectionsOnline site
- Details at [Evote API documentation](#)

Advantages of Evote Integration

- ***Voter roster stays current*** in real time
- ***Single sign-on*** experience for your voters since once they are logged into your site, they may be easily access the ballot without having to visit and log in to a second site
- ***Branded ballot pages*** are possible when using the web services integration method and consuming the ballot pages into your own site
- ***Record member engagement*** in real time, then use that data along with *social proof* to drive increased voter turnout

To Learn More...

Please submit the *Let's Talk* form at www.electionsonline.com/lets-talk.cfm to schedule a more in-depth examination of your association's election procedure and how ElectionsOnline can make it simpler.

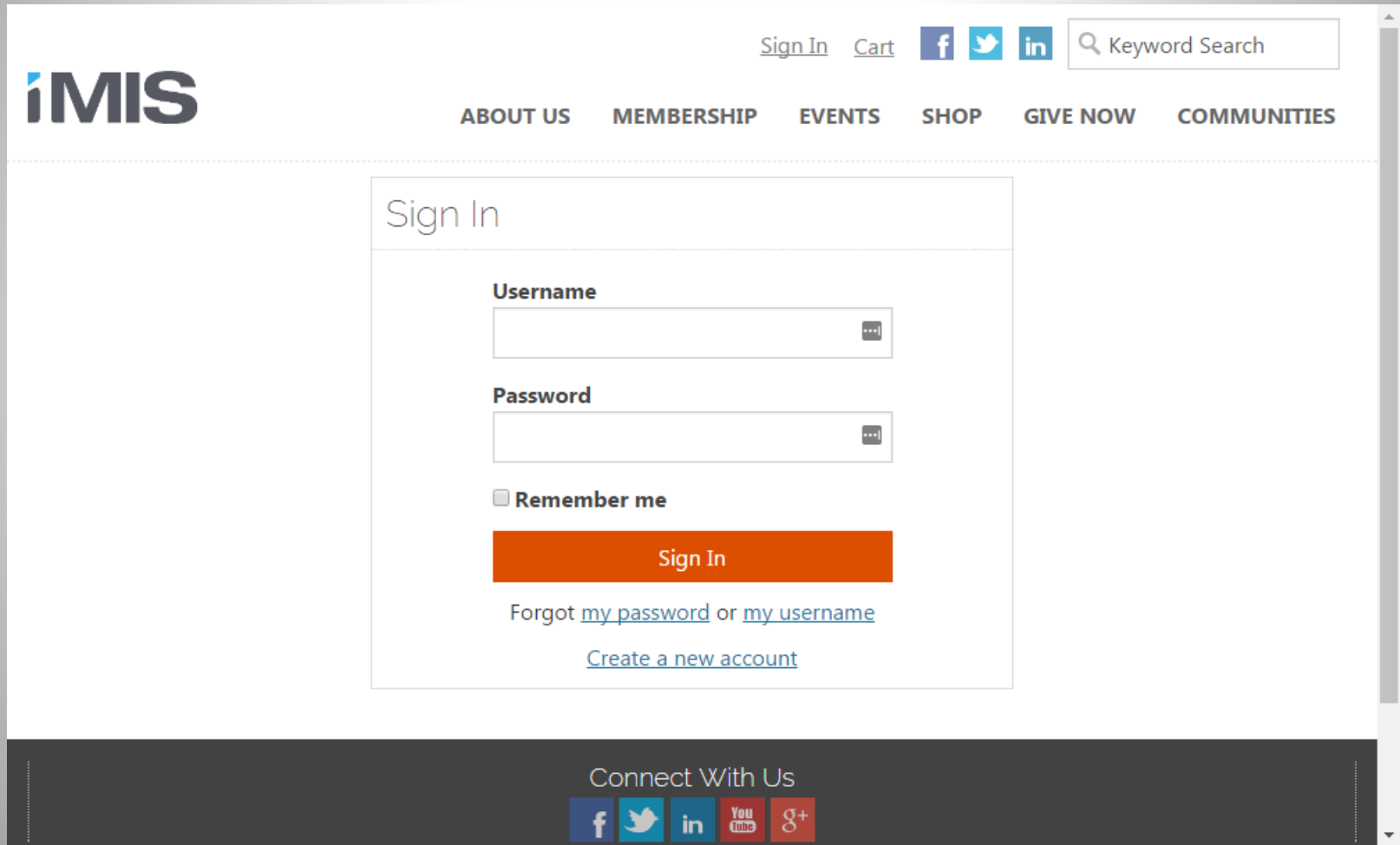
About the Integration

- Multiple deployment models
 - Passed Authentication
 - Accommodates three different options
 - Able to vote
 - Not authorized to vote
 - Already voted
 - iPart
- Open Elections are defined in a general lookup table
- Eligible Voters for each election are identified in an IQA Query
- All voting history (who voted not who they voted for) is stored in iMIS as an Activity Record

Passed Authentication

The screenshot shows the iMIS website interface. At the top right, there are links for "Sign In" and "Cart", followed by social media icons for Facebook, Twitter, and LinkedIn. A search bar labeled "Keyword Search" is also present. The main navigation menu includes "ABOUT US", "MEMBERSHIP", "EVENTS", "SHOP", "GIVE NOW", and "COMMUNITIES". The page title is "Elections Online Demonstration Page". Below the title, a paragraph explains that the page demonstrates how to integrate an online election into a RiSE site, mentioning the need for a unique election ID in the URL. A "Vote" section contains a circular "VOTE" button with stars and a link to "2016 Board of Directors". The footer features social media icons for Facebook, Twitter, LinkedIn, YouTube, and Google+, along with the text "Connect With Us", "Contact Us", and the email address "info@atsol.org".

Passed Authentication



The screenshot displays the iMIS website's sign-in interface. At the top left is the iMIS logo. To the right are links for 'Sign In' and 'Cart', followed by social media icons for Facebook, Twitter, and LinkedIn. A search bar labeled 'Keyword Search' is also present. Below the navigation is a horizontal menu with links for 'ABOUT US', 'MEMBERSHIP', 'EVENTS', 'SHOP', 'GIVE NOW', and 'COMMUNITIES'. The main content area features a 'Sign In' form with the following elements:

- Username**: A text input field with a clear button (X) on the right.
- Password**: A text input field with a clear button (X) on the right.
- Remember me**: A checkbox for remembering the user's login details.
- Sign In**: A prominent orange button to submit the login information.
- Forgot [my password](#) or [my username](#): A link for password recovery.
- [Create a new account](#): A link for new users to register.

At the bottom of the page, there is a 'Connect With Us' section with social media icons for Facebook, Twitter, LinkedIn, YouTube, and Google+.

Passed Authentication

The screenshot shows the top navigation bar of an iMIS website. On the right side, there are links for 'Sign Out', 'Douglas', and 'Cart', followed by social media icons for Facebook, Twitter, and LinkedIn. A search box labeled 'Keyword Search' is also present. The main navigation menu includes 'ABOUT US', 'MEMBERSHIP', 'EVENTS', 'SHOP', 'GIVE NOW', 'COMMUNITIES', and 'MY ACCOUNT'. The central content area displays a large orange error message: 'Sorry, you are not authorized to vote in this election!'. Below this, a paragraph explains that the election is only for members meeting bylaws requirements and provides a contact number: 555-555-5555. The footer contains social media links under 'Connect With Us' (Facebook, Twitter, LinkedIn, YouTube, Google+), a 'Contact Us' link, and the email address 'info@atsol.org'. At the bottom left, there are links for 'Benefits', 'Events', 'Shop', and 'Community List'.



[ABOUT US](#) [MEMBERSHIP](#) [EVENTS](#) [SHOP](#) [GIVE NOW](#) [COMMUNITIES](#) [MY ACCOUNT](#)

Sorry, you are not authorized to vote in this election!

We are sorry but you are not authorized to vote in this election. This election is only available to members who meet the requirements of our bylaws. If you think this is in error, please contact us at 555-555-5555.

Connect With Us



Contact Us

info@atsol.org

[Benefits](#) [Events](#) [Shop](#) [Community List](#)



Welcome

- To make your selection, select the button to the left of the option.

President

- | | |
|---|------------------------------------|
| <input type="radio"/> Bill Jones | <input type="radio"/> Thomas Baker |
| <input type="radio"/> Christine Smith | <input type="radio"/> Sarah Parker |
| <input checked="" type="radio"/> Make no selection. | |

Secretary

- | | |
|---|-----------------------------------|
| <input type="radio"/> Mary Ann Dewey | <input type="radio"/> Beth Harper |
| <input type="radio"/> Joshua Williams | <input type="radio"/> Samuel Hunt |
| <input checked="" type="radio"/> Make no selection. | |

Treasurer

- | | |
|---|---|
| <input type="radio"/> Amy Fallon | <input type="radio"/> Christopher Langley |
| <input type="radio"/> Bryan Hawk | <input type="radio"/> Donna Hayes |
| <input checked="" type="radio"/> Make no selection. | |

Referendum for by-law changes

- | | |
|---|--------------------------|
| <input type="radio"/> Yes | <input type="radio"/> No |
| <input checked="" type="radio"/> Make no selection. | |

Proceed



Confirm your selections

- If correct, click **Submit Ballot** to cast your votes.
- To alter your selections, click **Return to Ballot**.

President

Bill Jones

Secretary

Mary Ann Dewey

Treasurer

Amy Fallon

Referendum for by-law changes

Yes

[Submit ballot](#)

[Return to ballot](#)



Ballot accepted

Thank you. Your ballot has been accepted.

Encourage fellow voters to vote through email, LinkedIn, Twitter.



 Tweet

Was voting easy?

Rate it.

or

Give it a +1.



 973



Elections Online Demonstration Page

This page demonstrates how to integrate an online election into your RiSE site. On a production website you would create a webpage in RiSE and create a button or link to vote. Each election is setup with it's own unique election id. That election id must be incorporated into the url of the button or hyperlink.

Welcome

- To make your selection, select the button to the left of the option.

President

- | | |
|---|------------------------------------|
| <input type="radio"/> Bill Jones | <input type="radio"/> Thomas Baker |
| <input type="radio"/> Christine Smith | <input type="radio"/> Sarah Parker |
| <input checked="" type="radio"/> Make no selection. | |

Secretary

- | | |
|---|-----------------------------------|
| <input type="radio"/> Mary Ann Dewey | <input type="radio"/> Beth Harper |
| <input type="radio"/> Joshua Williams | <input type="radio"/> Samuel Hunt |
| <input checked="" type="radio"/> Make no selection. | |

Treasurer

- | | |
|---|---|
| <input type="radio"/> Amy Fallon | <input type="radio"/> Christopher Langley |
| <input type="radio"/> Bryan Hawk | <input type="radio"/> Donna Hayes |
| <input checked="" type="radio"/> Make no selection. | |

Referendum for by-law changes

- | | |
|---|--------------------------|
| <input type="radio"/> Yes | <input type="radio"/> No |
| <input checked="" type="radio"/> Make no selection. | |

Proceed

Dashboards

The screenshot displays the iMIS Elections Online Dashboard. At the top, there is a search bar and a user profile for 'MANAGER'. The main heading is 'Elections Online Dashboard' with a sub-heading 'Board of Directors Election Progress'. A progress bar shows 10% completion, with '71 Members Voted' and '71 Days Remaining'. Below this are two charts: 'Voters By Member Type' (a bar chart with a value of 3 for 'M') and 'Voters By State' (a pie chart with segments for 'CO' and 'TX'). The dashboard also includes sections for 'Elections Online Elections' and 'Elections Online Settings', each with a table of codes and descriptions.

Elections Online Dashboard
Board of Directors Election Progress

10% Members Voted
71 Days Remaining

Voters By Member Type

Member Type	Count
M	3

Voters By State

State	Count
CO	1
TX	2

Elections Online Elections

Code	Description
5368	\$/ATS/ElectionsOnline/BODVoters

Elections Online Settings

Code	Description
ACTIVITY TYPE	FI FCON INF

Communicate

The screenshot displays the iMIS software interface. On the left is a dark teal sidebar with the iMIS logo at the top and a list of navigation items: ATS Bridges, American Tradeshow Services, BlueSky, Boxwood, Bridge2Think, CommPartners, Elections Online, Highwire, iCoHere, Community, Membership, Fundraising, Events, Commerce, Marketing, and Certification. The main content area is titled "BOD Non Voters" and features a search bar labeled "iMIS Id Equals" with a "Find" button. Below the search bar is a table with columns for "iMIS Id", "Full Name", and "Email". The table contains five rows of data. Above the table is a pagination control showing "Page: 1 of 6" and "Item 1 to 5 of 28". Below the table is another identical pagination control. An "Email" button is located at the bottom right of the table area.

BOD Non Voters

iMIS Id Equals

Find

Page: 1 of 6 **Go** Page Item 1 to 5 of 28

size: 5 **Change**

[show all 28](#)

iMIS Id	Full Name	Email
1047	Bill Test_1	z@x.com
1051	Mike Hauck Test 01	mhauck@atsol.org
161	Albert Bachman	
176	Phillip Green	pgreen@atsol.org
198	Mr. Jonny Spot	jspot@nowhere.com

Page: 1 of 6 **Go** Page Item 1 to 5 of 28

size: 5 **Change**

[show all 28](#)

Email

Engagement Tracking

The screenshot displays the iMIS software interface for a member profile. The left sidebar contains navigation menus for Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main content area shows the profile for Mr. Glenn Leary, a Training Manager, with contact information and a photo. Engagement tracking is shown with a donut chart for a score of 98 and a bar chart for history. Membership details include ID, type, category, chapter, status, and dates.

Community

- Dashboard
- Find contacts
- Add contact
- Manage duplicates **PLDs**
- Committees
- Communities
- Volunteers
- Security

Membership

- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RISE
- Settings

Mr. Glenn Leary
Training Manager
[Version AP](#)
Mobile: 0452 959 739

Engagement score
98

Engagement history

Year	Score
2015	6
2016	4

Membership

IMIS ID	19047	Dues Amount	
Member type	Regular Member	Status	Active
Billing category	Billing Category 1	Member since	10/20/2001
Chapter	East Chapter	Paid through	
Member status	New	Billed through	5/1/2015
Status changed		Date added	11/5/2014
Last updated by	BRIANM	Last updated	2/4/2016 11:25 AM
Sponsor		CreditLimit	
Board	No	Advertiser	No

Addresses

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org



Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Who can see the results of the election? Can office staff see who has voted and who they voted for?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

What are the options for on-site voting at a convention? Can an election run during a single meeting and provide results within an hour?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can you record a voter's selections and store that information in iMIS?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Is there an abstain function?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

How easy is it to upload nominations on-the-fly (e.g. nominations from the floor)?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

My association does not use RiSE. Does ElectionsOnline require the use of RiSE?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can a voter choose multiple selections for an election involving several open seats?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

If you hover over or click on a candidates name, can you see their profile and bio?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can you add a photo next to the name rather than click for bio?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can the bio be pulled from iMIS?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

What version of iMIS is required to use the integration?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

How much control is there over the look and feel?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can you use this for a quorum collection?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

Can this be used in combination with other voting systems, for example, if people don't have their own laptop or phone to vote? Can we collect some ballots by paper and some online?

Questions & Answers



Presenter:

Randy Richter

Director of Technology Solutions, Partner
Association Technology Solutions, LLC

Direct: (720) 945-7256

Email: rrichter@atsol.org



Presenter:

David Simms, CUA

Elections Consultant

ElectionsOnline

Email: dsimms@electionsonline.com



Question

How do paper ballots get entered into the system?

More from ATS

Looking for more from the experts at ATS?

Upcoming Webinars

<http://atsol.org/Webinars>

schedule of upcoming webinars

Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and
downloadable presentation slides*

Other Questions?

Email: info@atsol.org

Online: <http://www.atsol.org>

Phone: (720) 945-7252