KCITE MEETING CHECK-IN THOUGHTS (by Ray):

KCITE / STARCHAPTER Website Election Guidance

Creating an election

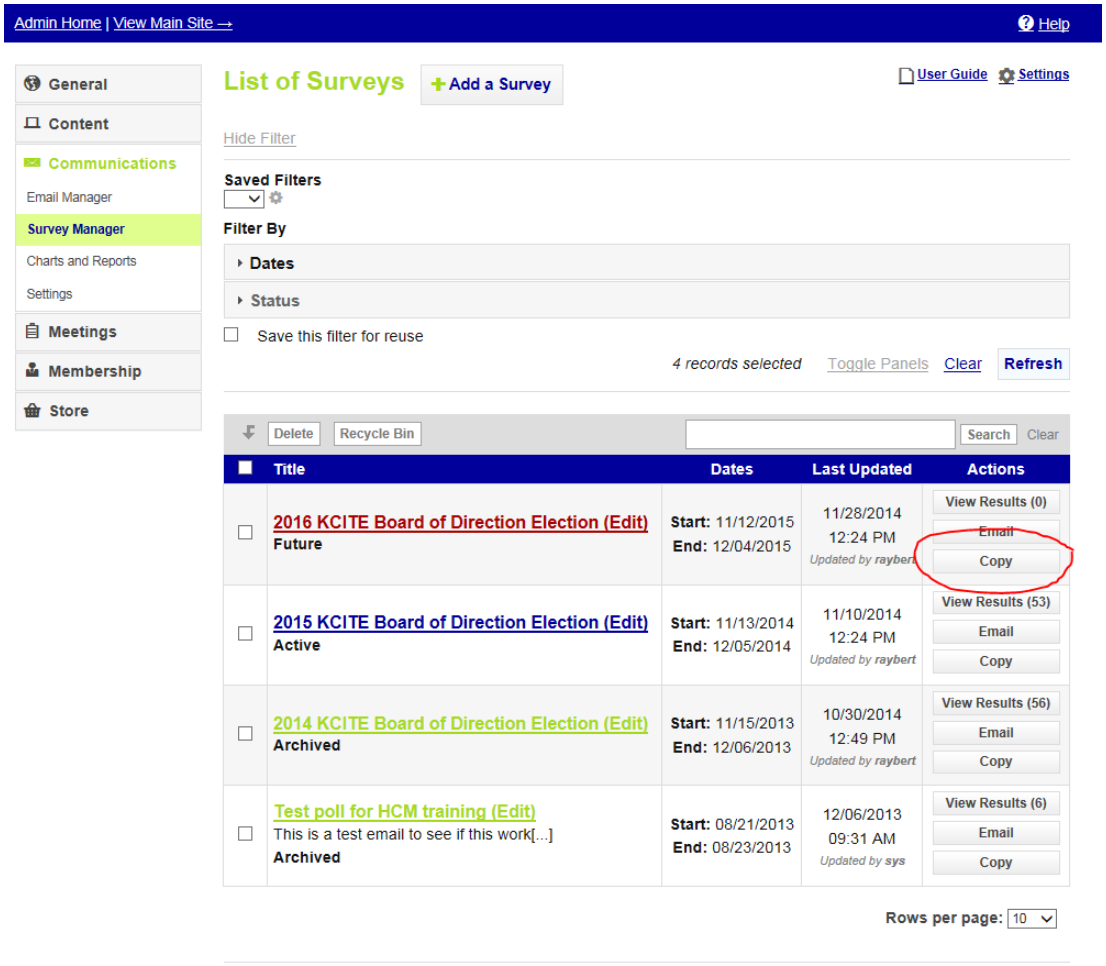
Creating and election is a two-step process. You must first create the election under the communications tab then click survey manager. Once the survey is complete, you must send it out with an email. You can find old emails by selection email manager and find in the filter archived filter and find the time frame in November the email would have go out. Use this for the text portion as you could cut and paste. However do create a new email.

The part that is difficult is in survey itself, under the survey heading, click edit; you will have to edit the URL tab. This tab creates the text of the candidate, link to the bio and the spacing on the page. You will be able to cut and paste from the past items.

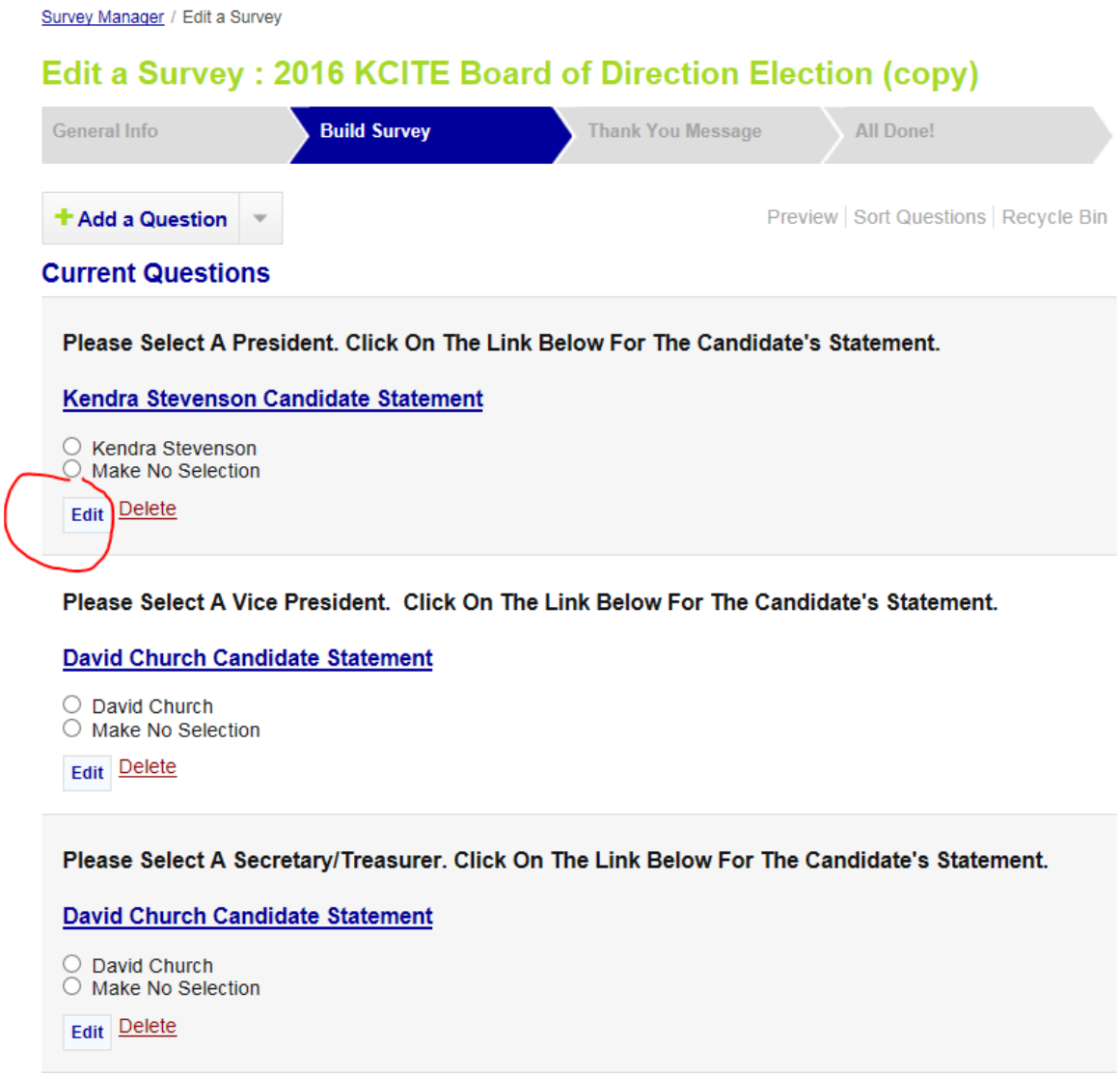
You will also need to have the election candidates bios created and uploaded. The bios can be uploaded to the content / media manger /documents tabs. There are pages of documents but you can go to the end and find where past election bios are however that may change since this document is written. Thus you can find them from the past as they are stored by folder “2015_Election”. When you upload new bios you will go to +add a file and will have a chance to create a folder to load which you will call “201X election”.

1). Setting up the Election survey

Go the the communication tab. Under that is the survey manger, click on this to bring up the list of surveys. Under the most recent election survey, click under actions “copy”. This will copy the most recent survey which you can edit.



The new survey should open. You will need to edit the name of the survey, start and end dates and any restriction. Click on “restrict access” and add “all members”. Go to next and you will begin to edit each candidate.



In the “edit” tab of each section this is where you will edit the hyper link of the candidate, name of the candidate and the HTML info. It works best to use the info starting with the president position, taking the info from the vice president position and pasting this into the president position.

Below is the HTML from the vice president to edit and copy into the president. In this case Kendra is to move into the president role and thus copy her info from the vice president info into the president section area for “question title”.

1) Change Bio link:

Please select a Vice President. Click on the link below for the candidate's statement. David Church Candidate Statement

____ the area above in yellow if the link you will copy once the bio is uploaded. You will copy the link when you open the bio and paste this link into this yellow area.

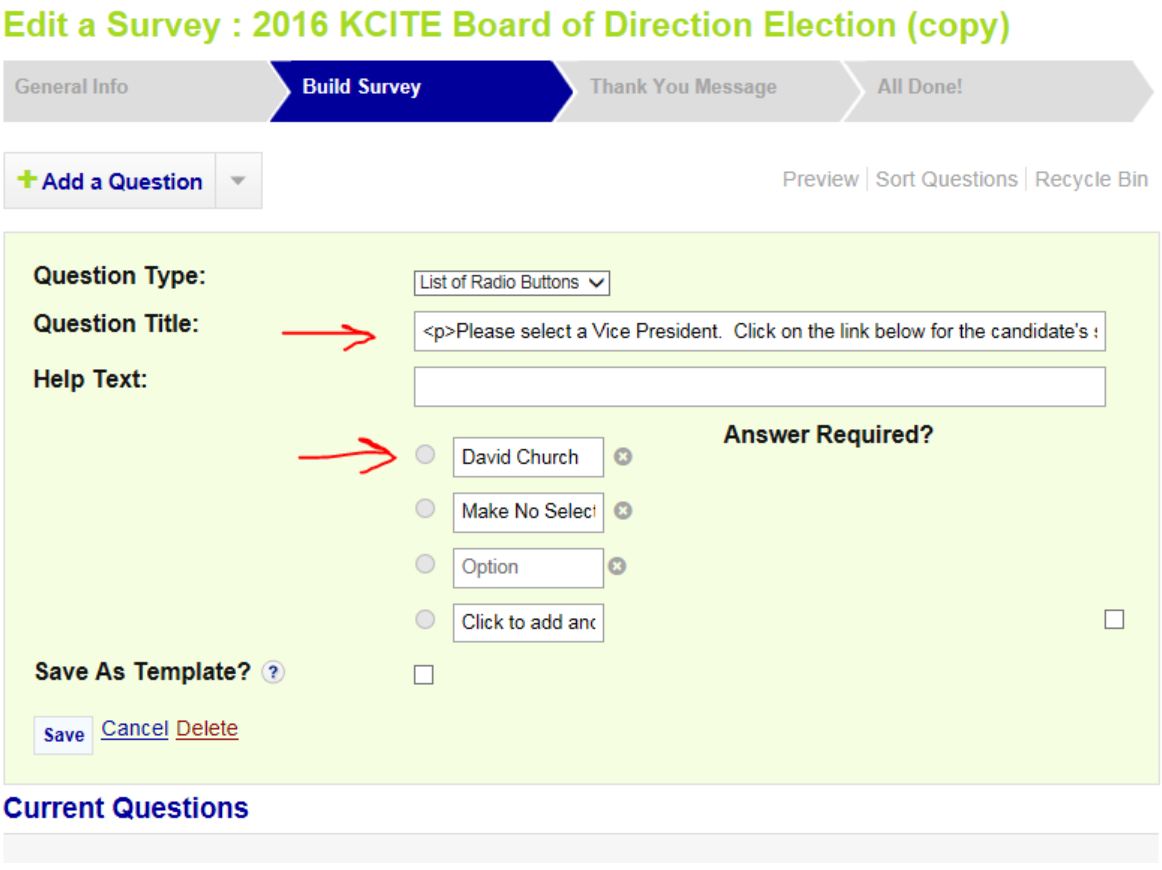
2) change candidate:

Please select a Vice President. Click on the link below for the candidate's statement. David Church Candidate Statement

___ the area above in yellow is where you change who is the candidate for the section you are editing.

Below is the screen shot that shows the area to edit the title of the candidate and where the rest of the HTML info is you cut and paste.

The red arrow pointing to David Church simply gets changed to the name you need for the position you are setting up.



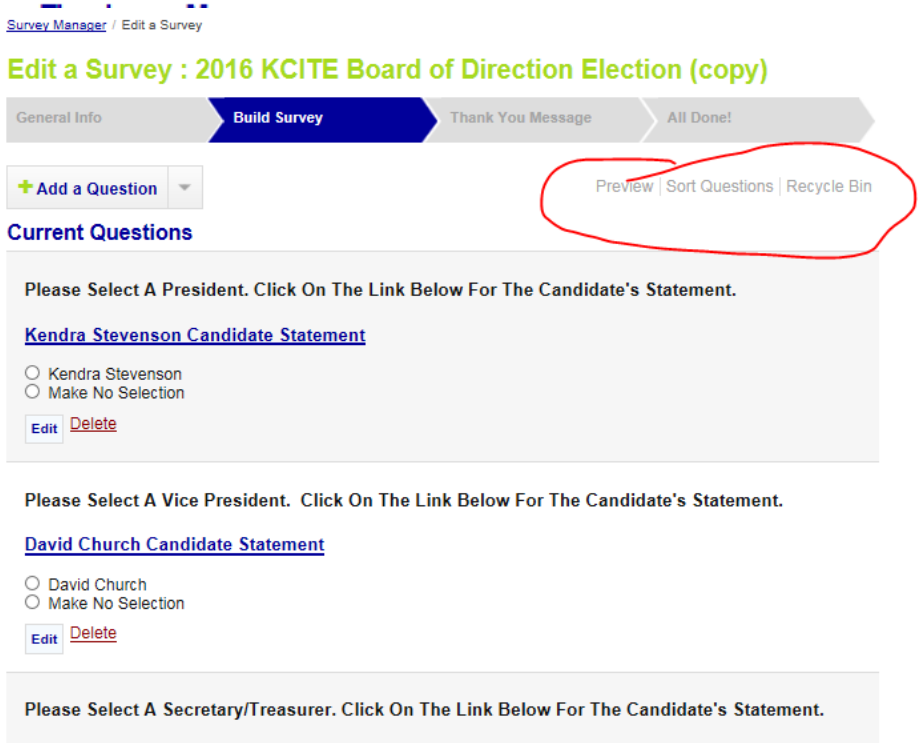
This process is repeating for the candidate moving up the ladder and for the Member director position you will create these but in the same manner

editing the HTML. Note that once you are complete with edits you need to save this work or if you made and error you can cancel and reenter.

When done with this page you can click Next or save or cancel to take you back to editing. If next you get a thank you message you can leave blank as you will provide that info in the email.

NOTE: the way you can preview your edits is while in the election survey, while in the survey, click on edit and when in the edit a survey below the area circled in red you can preview / sort / recycle.

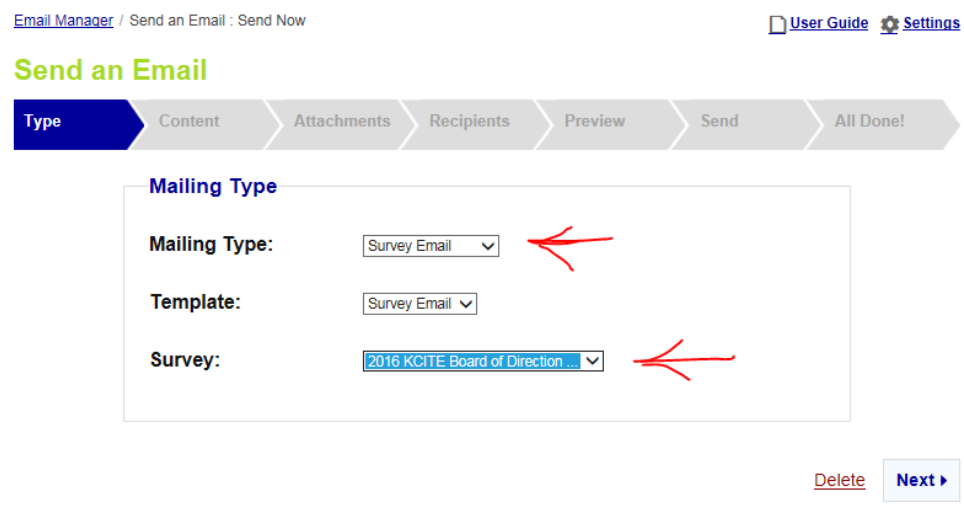




2). Setting up the Election Email

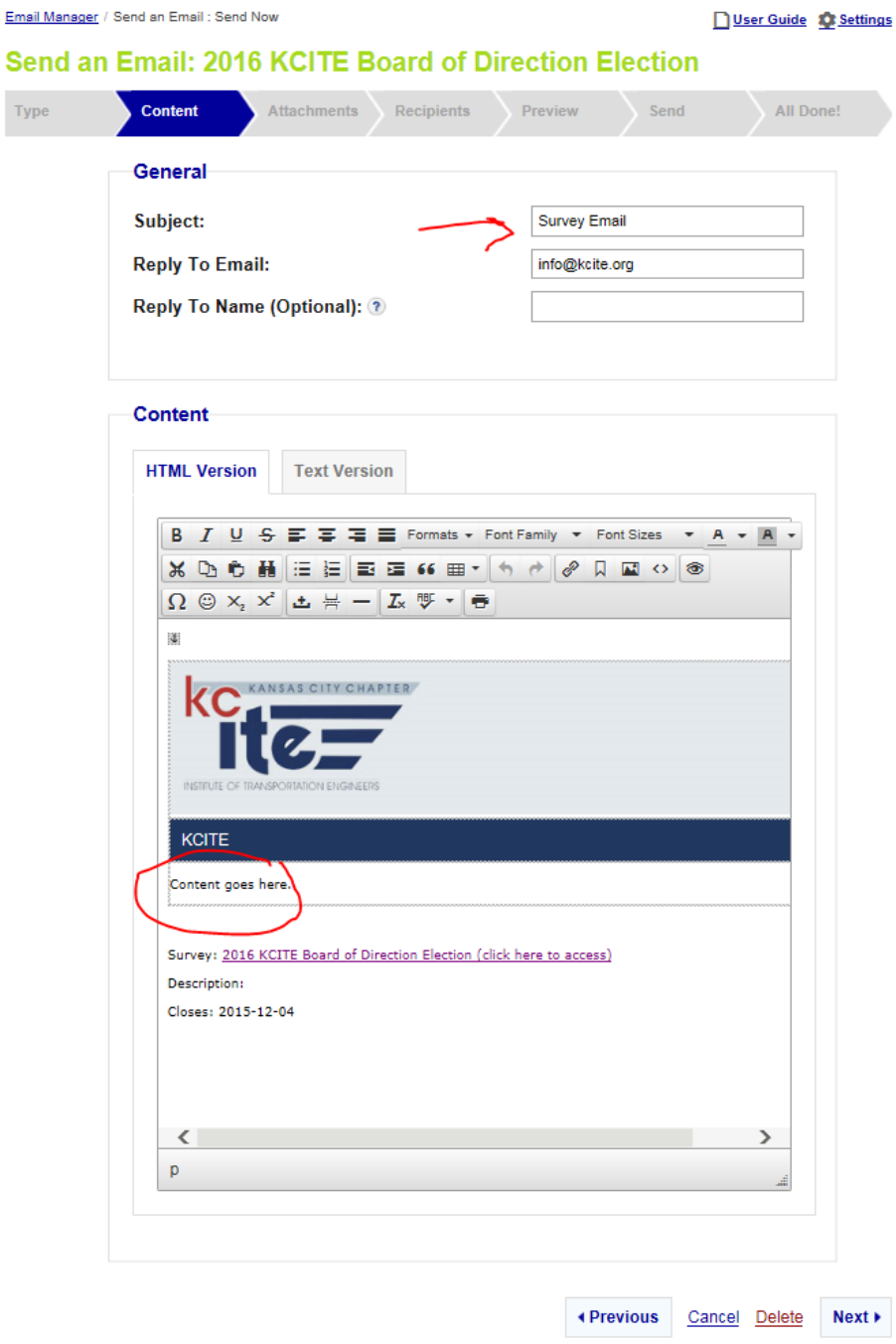
In this area this is not different than any other email. Start by clicking “send an email” in the email manager.

Below shows needing to select the mailing type and the survey drop down selects the survey you just created.



In the section below you will need to change the subject to the election title ie “2016 KCITE Board of Direction Election” as an example.

Also in the area circled in content this is where you can cut and paste from the last year election text.



NOTE: we have discovered if you paste the URL of the election survey directly into the email, it works and allow the member who receives the email to get the election survey screen immediately, it appears this also allows the member to vote from different IP addresses more times that one. Thus, only use the link to the content area the setup gives you. It will take the member to a page they must log in and then instruct them to click on the tab to the left to start the survey. The rest of the setup is straight forward.