Integration Guide for ElectionsOnline and netFORUM

## Introduction

Integrating ElectionsOnline

At the highest level, integrating ElectionsOnline with netFORUM requires that the election administrator:

1. Purchase and have the netFORUM/ElectionsOnline integration from benel Solutions installed.
2. Set up an election at the ElectionsOnline website.
3. Set up an election in netFORUM's iWeb.

This documentation assumes that steps 1 and 2 above are complete, and the election administrator is now ready to set things up in netFORUM's iWeb.

Set up an election in netFORUM's iWeb

1. Log in to iWeb, then go *Modules → CRM* as shown below.
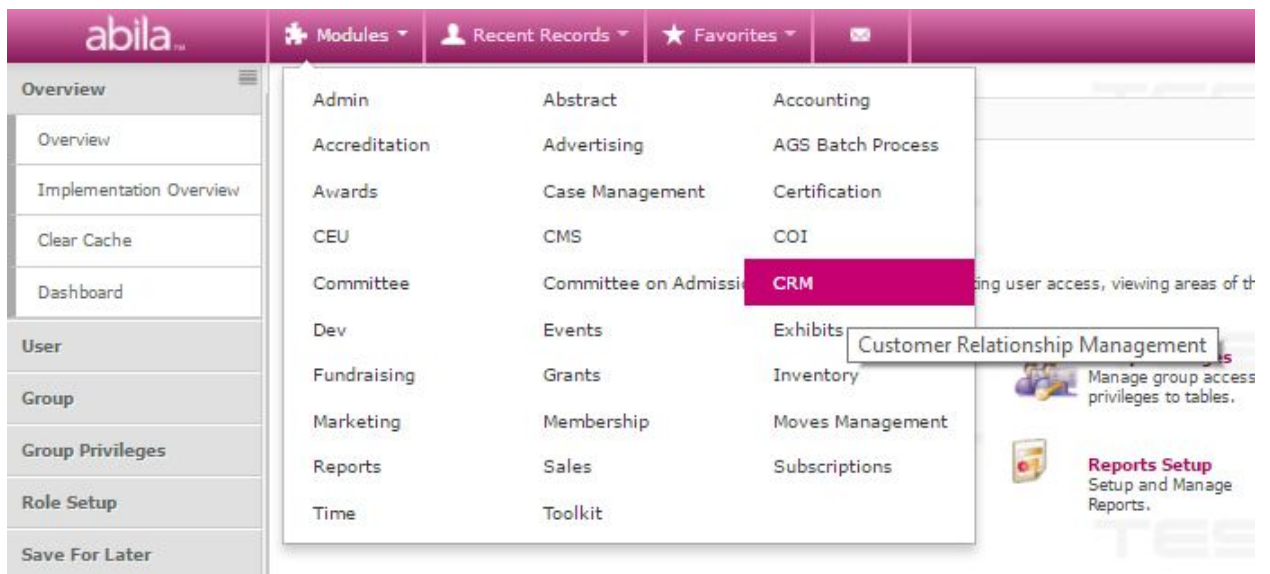
2. Within the CRM module, on the left-side navigation go *Elections → Add election* as shown below.

3. At the *Add - Election* form, shown below, you will need to provide:
   a. **The election ID** generated by ElectionsOnline for each election. To retrieve this ID, log in to your ElectionsOnline account and find the ID immediately beneath the election name. Provide it in the election ID field in netFORUM.
   b. **The election name.** For simplicity, this should be the same election name you specified in your ElectionsOnline account.
   c. **Election start and end dates** which should be identical to those provided when the election was set up in ElectionsOnline.
   d. **An optional description** of what the election is for.

Viewing elections

To view all elections saved in netFORUM, under the *Election* area of the CRM module, click either:
- List Elections
- Find Election
- Query Elections

Editing elections

To edit an election's settings:
1. Find the election to be edited.
2. Click the arrow to the left of the election name to open the edit window.
3. Make the desired changes and remember to always click Save.

Managing Voter Groups

If you've created voter groups for an election within ElectionsOnline, you need to create complimentary voter groups in netFORUM. The difference being:

- On the ElectionsOnline side, you specify which positions display to members of a group.
- In netFORUM, you specify which voters are included in a particular group.

This ensures voters who are members of a particular voter group will have the proper voter group code passed to ElectionsOnline to display the positions associated with that group.

Voter groups are specific to each election. Therefore, you may have one election underway where voter groups are in use and another where they are not. An individual who is eligible to vote in both elections would be placed into a voter group for one election, but then not in the other where they are not in use.

The steps below assume voter groups are already set up in ElectionsOnline.

Creating a new voter group

1. In iWeb, find the election for which to create voter groups and proceed to edit it.
2. At the edit election screen (the bottom half of which is displayed below), you will see two tabs--one for managing voter groups, the other for managing custom fields.

Ensure the voter groups tab is selected and click the plus sign near the right edge of the screen to create a new voter group.

3. A pop-up window appears as shown below.

You will be prompted to provide the following three pieces of information:
   a. **Voter group title**. For simplicity, this should be the same as the voter group name used in the ElectionsOnline system.
   b. **Voter group code.** This must be identical to the voter group code used in the ElectionsOnline system.
   c. **SQL criteria.** This is where you provide a SQL (Structured Query Language) SELECT statement to execute against the netFORUM database and select which voters are members of this voter group. The results are stored in a reference table created during the integration installation. As you will see later, this query may be scheduled to run nightly to keep the reference table up-to-date during the course of your election so voters who become members of this voter group during the election are added to the group's reference table.

   This SQL query may be anything you want it so it allows for the ultimate in flexibility. Organizations without a database writer on staff, may wish to retain the

services of benel Solutions to have that query written for them according to their own business rules.

Editing Voter Groups

To make edits to a voter group, follow the steps for creating a new one, but click the pencil icon to the left of the voter group name (displayed in step two above) to enter the edit window.

Placing voters into voter groups

The SQL statement you associated with a voter group when creating it, does not run in real time at the moment a voter accesses the ballot to determine what, if any, voter group code should be associated with that voter. Instead, the statement selects all records that should be placed into a voter group, then places those records into a reference table that is queried when a voter accesses the ballot. To do this:

1. In iWeb, go *Modules → Admin*.
2. In the *Admin* module's left-hand navigation go *Task Scheduler → Dashboard* and click the task named *BNE {XXXX} Execute Criteria.* (The {XXXX} will be replaced with your organization name.)
3. To run the task immediately, click Now as seen in the image below, then click Save.

You may also configure this scheduled task to recur by select the frequency from the *recurrence* select list and configuring when and how often it should run.
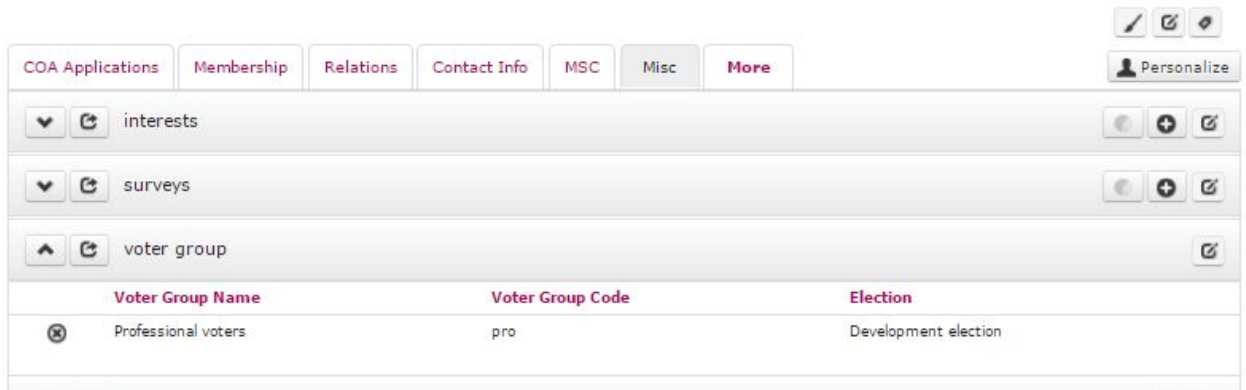
4. Upon successfully running the task, you will see the results of the run on the bottom half of the screen.

Verifying an individual is added to a voter group

To verify an individual is included in a voter group:
1. Find that individual in the CRM.
2. On that individual's profile page, select the More tab, then the MISC option.
3. That will add the *Misc* tab to the interface. Select that tab and notice the *voter group* pleat in the options. In the example on the following page, the voter has been placed in

the voter group *Professional voters* with the voter group code *pro* for the election named *Development election*.

4. If you wish to remove an individual voter from a voter group, click the circled X to the left of the voter group name for that individual.

Managing Custom Fields

For more about using custom fields, see
https://www.electionsonline.com/blog/post.cfm/enhanced-demographic-reporting

Custom fields are managed nearly identical to voter groups. The difference is that instead of providing a SQL SELECT statement to place voters into a group, you specify a field in netFORUM to use as the custom field value. In the *Add - Custom Field* pop-up window shown below:

- The value for *netforum field:* is the field in netFORUM to use as the custom field value.
- The value for *electionsonline field:* will always be one of the following four:
  - Custom1
  - Custom2
  - Custom3
  - Custom4

One special note about custom fields. In the ElectionsOnline system, it is possible to change a custom field's label to something that describes the data. Examples might be things like age, gender, state. That does not change the custom field name, it only changes the custom field's label. The name will always be one of the four names provided above and only those should be used when setting up custom fields in netFORUM.

Managing Special Interest Groups

For general information about using special interest groups and how they differ from voter groups, see
https://www.electionsonline.com/blog/post.cfm/voter-groups-versus-special-interest-groups.

Special Interest Groups (SIGs) are calculated using a stored procedure inside the netFORUM database named *ben_xxxxx_get_user_sigs*. ("xxxxx" will be replaced with the name of your organization.) When the integration is installed, you may request to have that procedure customized to select whatever value(s) you wish, but a typical use would be to select the committee codes for the committees a member belongs to and pass to ElectionsOnline. That is contingent on a committee code also being assigned to a position in the ElectionsOnline system.

Configuring the eWeb Ballot Pages

Voters will access the ballot through a netFORUM eWeb page. The steps for moving through the ballot are:

1. Visit the election landing page. This will be password-protected and you may be prompted to login if you aren't already. (benel Solutions will provide the address after the integration is installed.) Visitors to this page will fall into one of three categories and should see an appropriate message based on their category.
    a. Individual is an eligible voter and has not already done so.
    b. Individual is an eligible voter but has already voted.

        c.   Individual is not eligible to vote.

2. For those eligible to vote and who have not already done so, they may proceed to the ballot.
3. Once selections are made, the next page the voter sees is a ballot confirmation page where they may confirm the selections they made and submit the ballot.
4. Once the ballot is submitted, the voter sees a message to that effect.

Configure the election landing page

The factors influencing voter eligibility vary greatly from one organization to the next. You will need to customize, or have benel Solutions customize, the query that drives the message--and possible link to the ballot--displayed on eWeb's election landing page. Detailing that is outside the scope of this documentation, so consult with your internal technology staff, or benel Solutions handle this as part of installation.

Style the ballot

You have complete control over the style of the ballot once it's consumed into your own site so you may make it blend in with your own site's look and feel. The easiest way to do this is:

1. Visit the Sample Ballot at the ElectionsOnline website.
2. View the source code on the sample ballot and copy the style sheet from the <HEAD> section.
3. Paste the style sheet from the previous step into your own site's eWeb style sheet.
4. The ballot will now be styled using the CSS rules from the style sheet in the previous step. You may freely edit those CSS rules so they style the ballot in a manner that blends in with your own website.