TallySpace Documentation

Release 1.43

Nathan Jovin

January 01, 2014

Contents

TallySpace provides secure online & SMS voting & surveys. This guide includes everything you need to know to use the system, from setting up and administering votes to voting.

The documentation is organized into two sections: Ballot Administration and Voting. We suggest that accont & ballot administrators read both sections to thoroughly understand how the system works.

Support is always available via support@tallyspace.com.

Ballot Administration

1.1 Overview

There are a few concepts you should be familiar with to understand how to set up and administer your ballots on TallySpace.

1.1.1 Ballots

The first thing you'll do when setting up a vote or survey is create a ballot. A ballot is simply a collection of one or more Categories. It's useful to group categories into a ballot because you can set security requirements on a per-ballot basis, which will allow voters to log in once to vote on multiple cateogories.

1.1.2 Categories

Categories (or questions) are individual things voters vote on. Each category may contain multiple choices or candidates (or none at all, in the case of a write-in category).

Categories on the same ballot *can* have different security settings, which allows you to set up a single ballot where some voters can see/vote on some categories, but not others.

1.1.3 Choices

Each category can contain one or more choices (or candidates). These are the options voters choose from when casting their votes.

1.1.4 Contacts

Contacts most typically contain a list of approved voters. Importing or entering a contact list allows voters to log in with information they already know, without the hassle of having to sign up for an account on their own.

For categories with a large number of choices, you can also populate the choices from your contacts list.

Contact Custom Fields

TallySpace allows you to import or track any information about your contacts you like. This makes it a breeze to control who can vote on each category in a very granular way. "Grade Level" is an example of a cusotm field - in many cases a school will only want to allow 12th graders to vote for 12th grade president. Custom fields are what makes this possible.

1.2 Frequently Asked Questions

1.2.1 How does the SMS voting work?

It's simple: you pick a 10-digit phone number to receive SMS votes at. You set up a ballot with categories and then choices for each category. You assign each choice an *SMS Option* which can be a number or word. Voters send a text message to your SMS phone number with their choice, and it's counted immediately. This is explained in more detail

1.2.2 How do voters vote online? Do they need a special link? Do they need to register?

When you sign up for an account, you're automatically assigned a custom link for your voter's to log in at. This can be viewed and changed from the *Custom Voting Address* page.

Note: If your voters end up on tallyspace.com without using your custom link, they can still log in to vote. They'll be prompted to find your organization (by name), once they'll selected it, they can log in

From your organization's voting page, voters will see a list of all open ballots. They can click on any of them and they'll be taken to a login page where they log in with the information you selected when you *set up the ballot*.

The beauty of TallySpace is that voter's don't have to sign up or create their own account - they log in with information they already know, using information you *import for them*.

1.2.3 Why is TallySpace so much less expensive than some other SMS voting providers?

Many other SMS providers use shortcodes (4 and 5 digit phone numbers). These are very expensive and you usually have to share the code with all of that provider's accounts.

TallySpace allows voting using standard 10-digit phone numbers. Because these are less expensive, we can assign a dedicated number to each account.

1.2.4 Why is TallySpace more expensive than services like Google Forms, Survey-Monkey, or Wedgies?

Those services are great for setting up quick surveys where security isn't critical. For election-type surveys where you need to be certain that voters aren't gaming the system, TallySpace is the right tool for the job.

1.2.5 How do I make sure each voter only votes once, or how do I let them vote more than once?

When voting online, voters only get one vote, by default. You can allow voters more than one vote in the *Category Settings*.

For SMS voting with the *Require ID* option set, the same rule applies. Voters' identity is verified by their ID number - they will be able to vote either online or via SMS, but not both.

For SMS votes with the *Limit Votes by phone number* option selected, the number of votes can still be set on *Category Settings*, but no contact information is cross-checked. The system allows X votes per phone number.

1.2.6 Can I let voters vote once per day, week, or month?

Yup - when you set the number of votes allowed on the *Category Settings*, you can specify whether that applied to their total number of votes, or votes per day, week, or month.

1.2.7 Can I send a response back to voters when their SMS vote is succesful?

Yes - on the *Advanced Settings* tab of the *Edit Ballot* page you can specify a message to be sent back to voters when their SMS vote is succesful.

1.2.8 How do I replace my contact list with all new contacts?

When importing your contact list, there is an option to delete all existing contacts and replace them with the new ones. See *Importing Contact Lists* for details.

1.2.9 I want somebody else in my school/organization to be able to use the service, can I do that?

Absolutely! You can manage additional users from the *User Management* section of your account. You can even set it so that they only have access ot view and manage the ballots that they set up, and no one else's.

1.2.10 It doesn't look like my SMS votes are being counted, what do I do?

There are a few things that you should check if SMS votes aren't being counted as expected:

1. Check the *SMS Security* options for the ballot. If you're requiring an ID number, make sure that the voters are including the ID number before their choice. You can view the incoming messages from the *SMS Activity* page

2. Make sure your Ballot is accepting votes, by checking the *Ballot Overview Page*.

3. Make sure voters are sending their messages ot the correct phone number, which you can check on your *SMS Setup* page.

1.3 Ballots

Ballots are the containers for categories and choices. Before you can conduct any vote or survey, you need ot create a ballot.

1.3.1 Creating a Ballot

On the *Ballots* page click the green *Create Ballot* button to get started. This will open the 'Ballot Setup Wizard' which will guide you through the process of setting up a ballot, including Category setup and security options.

1.3.2 Ballot Overview Page

Once you've set up a ballot, you'll be taken to the *Ballot Overview* page. This gives you a quick view of the status of your ballot (accepting votes, scheduled, etc.), categories, and voting options (SMS, online, etc.).

1.3.3 Basic Settings

- **Ballot Title:** This is what displays in the list of available ballots before a voter logs in
- **Online Voting:** Check this box to allow voters to vote online
- **SMS Voting:** Check this box to allow voters to vote via SMS (text-message)
- **Result Viewing:** Check this box to allow logged-in voters to view the results in real-time

Note: If you don't see the SMS voting option, you need to choose an SMS voting phone number from the *SMS Setup* page

1.3.4 Security Settings

TallySpace allows you to control exactly how voters are authenticates whether they're voting on line or via SMS.

Online Vote Security

Check the box for each field that you want to require voters to fill in prior to being allowed to vote. Whenever a voter wants to vote online, they'll need to enter the information for each of these fields *as it appears in your contact list* before they can vote

Note: TallySpace does not offer a voter self-registration process. Only voters you've imported or entered manually will be able to log in. Make sure you've imported or entered all of the information you're requiring or else nobody will be able to vote.

SMS Security

You have three ways to restrict who votes via text-message:

- **Require users to enter their ID number:** If you choose this option, voters need to begin their text message with their ID number (as shown in the contact list). For instance, if a voter with ID 87989 wants to vote for a choice with SMS Option 3, they would send:

```
87989 3
```

Note: TallySpace allows you to run 'mixed-mode' online & SMS votes. If you set up a ballot to allow online & SMS votes, be sure to select this option - this will prevent users from voting online and via text. Since they are authenticated by their ID number no matter how they vote, this allows us to ensure they only vote once.

- **Allow X votes per phone number:** This will allow anyone to vote (*not* just contacts in your contacts list), but only allow X votes per category. You set what X is in the *Category Settings*.
- **Only allow votes from known contact phone numbers:** If this is selected, only votes from phone numbers associated with contacts in your Contacts list will be counted.

1.3.5 Advanced Settings

The *Advanced* tab provides additional controls over the way your ballot behaves

Scheduled Opening/Closing of Polls

If you'd like a ballot to start & end accepting votes at a specific date & time, you can set that here.

Publicly Viewable Results

Clicking the *Generate URL* button will generate a unique web address. Anybody with this address will be able to view the results of your vote without logging in.

Hide Votes/Voters

By default, all information about every vote cast is available to the account administrator. This includes who voted for whom, when, and some additional technical info.

In some rare cases, due to privacy requirements, you may wish to hide the voter or their specific choice from the vote logs.

Note: If these options are selected you will not have access to specific voting results, only totals. TallySpace does keep a record of this information for technical and auditing needs, but it will not be released to the account administrator without a legal order if these options were selected while the votes were cast.

Respond to Failed SMS

By default, if a user's SMS message can't be authorized or matched to a valid SMS Option, the system will respond to them with an error message. If you'd like to disable this behavior, uncheck this box.

Respond to Succesful SMS

By default, no message is sent back to users when a vote is submitted succesfully. If you'd like to change this, check this box and fill in the message you'd like sent back to voters.

Respond to Failed SMS

By default, if a user's SMS vote is succesful, the system does not send any response. If you'd like to send a response when a vote is counted succesfully, check this box and type in the message you'd like sent back to voters.

Warning: Response messages to voters count against your account's SMS messgae allotment. This means if you're on a plan that allows 5,000 message, you'll only be able to accept 2,500 votes (2,500 incoming votes + 2,500 confirmation responses sent back to voters).

Archiving & Deleting Ballots

You can *archive* a ballot by clicking the archive button. All this does is move the ballot from the *Current Ballots* tab to the *Archived Ballots* tab. It does not delete results.

Clicking the *Delete this Ballot* button will permanently delete a ballot and all results.

Resetting Results

The *Reset Results* button allows you to permanently delete all votes for a ballot.

1.3.6 Viewing Results

The *Results* tab will take you to the Results page for a ballot - showing the totals for all choices in each category.

Exporting Results

The green 'Export Results' button at the top of the *Results* page allows you to export detailed results as an Excel CSV file:
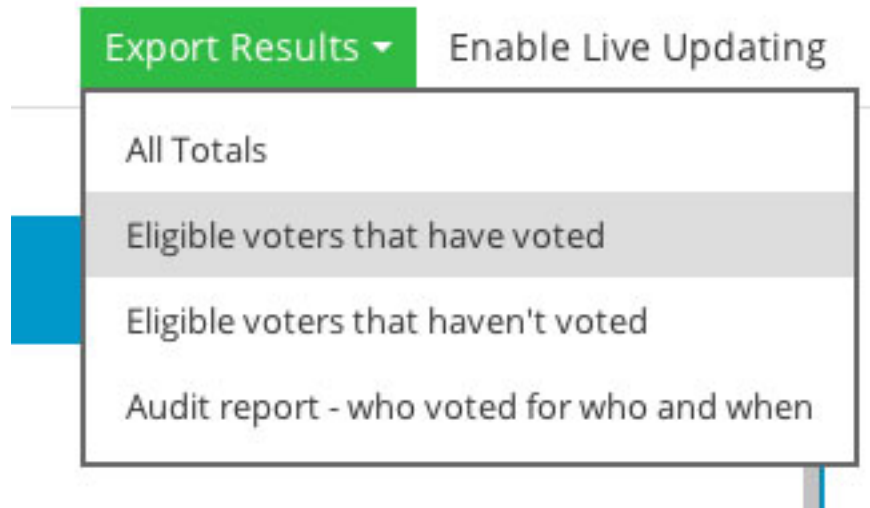
- **All Totals** exports a list of all categories and totals for each choice
- **Eligible voters that have voted** exports a list of just voter names who have voted
- **Eligible voters that haven't voted** exports a list of eligible voters who haven't yet submitted any votes
- **Audit Report** is the most detailed report - it shows exactly who voted for who, when, and from which IP address.

Live Updating

Whether somebody votes online or by text message, the results are counted immediately. It's usually less than five seconds from the time a message is sent to the time our system received, parses, and saves a vote.

However, by default, you need to refresh the results page to get the most up-to-date data. If you're at a live event or monitoring the results and would like the results to update in real-time without having to manually refresh the page, simply click the *Enable Live Updating* button on the results page.

1.4 Categories

Category settings can be accessed by clicking the*Edit* button (with the pencil icon) in the *Categories* list from the *Ballot Overview Page*.

1.4.1 Creating a Category

Simply click the *Add Category* button on the *Ballot Overview Page* to create a new Category.

1.4.2 Basic Settings

- **Category Title:** The title (or question) that will show above the choices on the ballot.
- **Vote Quantity:** This sets the number of votes each voter is allowed to cast in this category. You can restrict the total number of votes, or allow each voter a specific amount of votes per day, week, or month.
- **Show Choice Photos on Ballot:** If set, you'll be able to upload a photo for each choice, which will be displayed on the ballot.

- **Show Choice Description on Ballot:** If set, you'll be able to enter a long-form description (details, platform speech, biography, etc.) which will be displayed next to the choice on the ballot.

1.4.3 Entering Choices

There are three ways to populate the choices on the ballot for each category:

Candidate Selection Method

- ◉ Enter specific candidates/choices
- ◯ Populate ballot based on criteria (grade, gender, etc.)
- ◯ Allow voters to write-in free-form answers.
  If this is selected, no tallying will be done on the results - you'll just be able to export a list of responses from voters.

Manually Enter Choices

This is the default setting. Simply click the green *Add Choice* button to add choices to the ballot for thie category.

If you've enabled SMS voting on the ballot, you'll need to enter an SMS option for each choice.

Note: For ballots with SMS enabled, this is the only available option since each choice must be manually assigned a unique SMS code

Populating Choices from Contacts

Select the *Populate ballot based on criteria* option to auto-populate the ballot from your contact list, optionally filtering the choices. This is a typical setting for schools who, for exampke, want to list all 12th grade females as choices for Homecoming Queen.
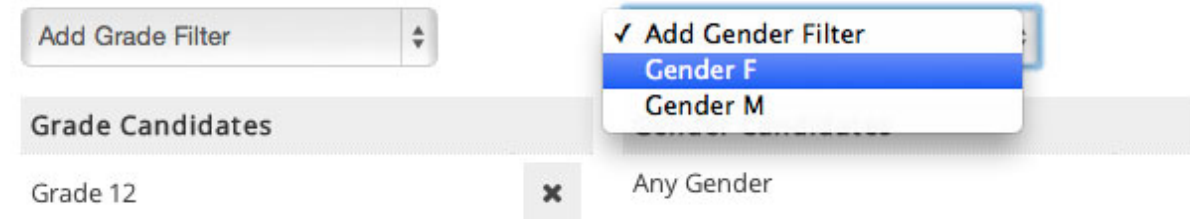
Write-In Choices

Select this to not display any choices and alllow voters to write in their own choice. No tallying will be done on the results, but you'll be able to export the votes and tally them manually.

1.4.4 Restricting Voters

If you've imported contacts, the *Who Can Vote* tab allows you to restrict who can vote on any specific category. You can restrict voting using any custom fields you've set up for voters. This setting is commonly used by schools to restrict voting to specific grade levels.

1.4.5 Advanced Settings

The *Advanced Settings* tab on the *Edit Category* page has some additional, lesser-used controls:

Choice Ordering

You can choose how the choices are displayed on the ballot. Choices can be displayed alphabetically, in a custom order, or in a random order each time the ballot is loaded.

Excluding Specific Contacts as Choices

If you've chosen to populate the category choices from the contacts list, you can exclude specific candidates (such as previous winners).

Excluding Specific Contacts as Voters

If you need to exclude specific contacts from voting (such as candidates or previous winners), you can do so.

1.5 Contacts

Contacts serve two purposes:

- If you are creating a ballot with hundreds of choices, they allow you to easily populate the ballot from an imported contact list
- If you need to restrict who can vote, they allow you to restrict voting to known contacts

1.5.1 Importing Contact Lists

Note: There's a video walkthrough available for importing contacts: YouTube Vimeo

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The easiest way to get all of your contacts into the system is using TallySpace's import tool. Simply click the *Import Contacts* button at the top of the *Contacts* page to get started.

Uploading the file

Once you're on the *Import Contacts* page, simply drag & drop the CSV file containg your contacts' info (or click the *Choose File* button) to get started.

Note: If you get a message that your file isn't a CSV file, open it in Excel, then click File->Save As and under 'Type' select 'Comma Seperated Values' and re-save the file

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Labeling Columns

You'll be shown a list of columns from your uploaded file, and you'll need to tell us what data is in each column. In most cases the system will take a guess at the data.

If the data in the column is something you want to import but there's no field listed - don't sweat it! - you can create a custom field. Simply choose the *CREATE A NEW FIELD* option and label the field.

Fifth Column

This column contains the contacts':

CREATE A NEW FIELD

New field description:

Department

Your Data for Column Five

- Department
- Advertising
- Public Relations
- Asset Management
- Quality Assurance
- Accounting

Assigning global values

In some cases you'll need to assign a property to all contacts being imported (such as if you're importing a list of all 9th grade students, but the grade isn't included in the file). You can use the *Apply these properties to all contacts* fields to do this

Apply these properties to all contacts being imported

Grade:

9

Gender:

Choosing Import Method

The last step is choosing how your contacts list will be imported, you have three options:

- **Add these contacts to the existing list:** This will import all contacts in the new list and leave all of the existing contacts. No checking for duplicates will be done.
- **Update my existing list with the new list:** For each contact in the list, the system will look for an existing contact with the same *ID Number*. If one is found, that contacts info will be updated with the info on the CSV file. If none is found, a new contact will be created.
- **Delete all contacts:** Will delete all of your existing contacts and import the CSV file.

1.5.2 Adding Individual Contacts

If you need to add individual contacts (such as adding new voters once your voter list has been imported), simply click the *Add Contact* button on the *Contacts* page.

1.5.3 Viewing & Editing Contacts

You can view & search contacts from the *Contacts* page of your account. Use the *Search* box at the top of the contact list to quicly search for contacts by name.

To edit or delete existing Contacts, simply click the *Edit* or *Delete* button in the *Contacts* table.

1.5.4 Custom Fields

To view and edit custom fields for contacts (such as grade, gender, team name, etc.) click the *Custom Fields* button on the *Contacts* page.

1.6 Account Administration

1.6.1 Organization Info

Your organization name, billing address, and time zone can be set from the *Organzation Settings* link on the *Settings* menu.

Note: It's important to set the correct timezone if you're scheduling voting times.

Custom Voting Address

You account includes a custom link that voters can log in at. This can be viewed and changed from the *Organization Settings* page.

1.6.2 SMS Setup

You can enable SMS voting and export SMS voting activity from the *SMS* link on the *Settings* menu.

Choosing an SMS number

The first time you visit this page, you'll be prompted to select an SMS voting phone number - this is the number voters will send their votes to. Simply enter your area code and click *Search* and you'll be given a list of available numbers in your area to choose from.

Once you've selected an SMS number, this page will show you your SMS number and show how many messages are remaining in your current SMS plan.

SMS Activity Reporting

To view a detailed log of all messages that have been sent to your SMS number, click the *Export Activity* tab on the *SMS* page.

1.6.3 Billing, Service, & Payment Setup

You can view & change your payment settings, plan, and invoices from the *Billing* page.

1.6.4 Adding & Managing Users

Users are other people in your organization who you want to let view results, create ballots, and manage billing settings.

You can add, edit, and delete users by choosing *Manage Users* from the *Settings* menu.
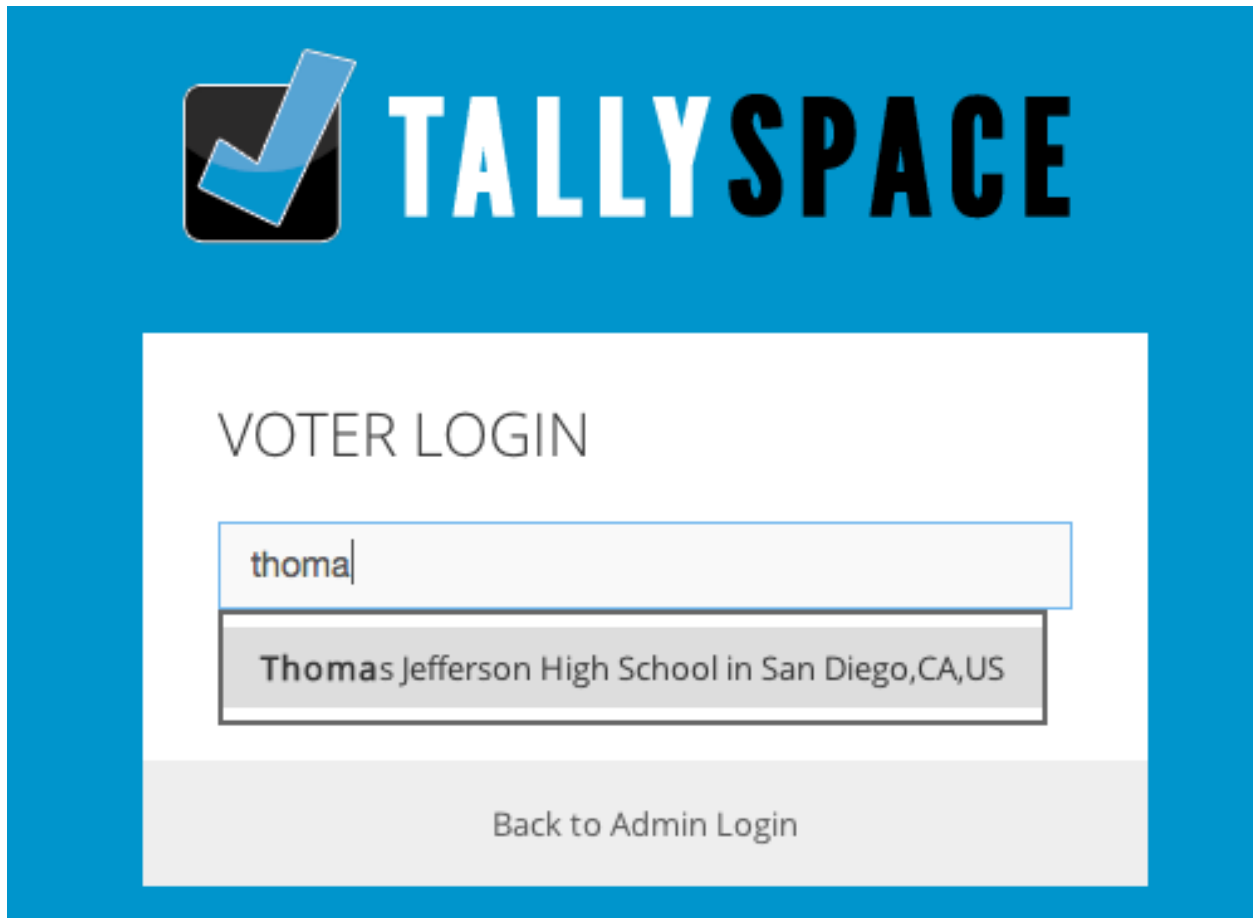
1.7 Video Walkthroughs

- Importing Contacts YouTube Vimeo
- Yearbook standouts ballot YouTube Vimeo

Voting

2.1 Voting

2.1.1 Voting Online

To vote online, start by going to your organization's TallySpace address (http://vote.tallyspace.com/your_organization). If you don't know it, go to vote.tallyspace.com and search for your organization.

Once there, you'll see a list of all open ballots for your organization. Click 'Vote Now' next to the one you'd like to cast your votes for. You'll be required to enter your info to log in. Once you've done so, you'll see a list of categories you're authorized ot vote on. Select your choice from the dropdown in each category.

Once you're finished, click the 'Finalize Vote' button at the top of the page. This will lock your vote so that it can't be changed.

2.1.2 Voting via SMS (Text-Message)

Your organization should provide you with a phone number to send your vote to, a list of choices, and their corresponding SMS codes. It will look something like this:

CATEGORY	CHOICE	SMS OPTION
President	John Smith	1
President	Jane Doe	2
President	Kevin Patrick	3
Vice President	Bob Williams	4
Vice President	Keith George	5
Vice President	Cindy Brady	6

If your organization required you to include your ID number in the text message, you want to include it before your vote.

For example, if your organizations SMS number is 858-555-1212, your ID number is 87879 and you'd like to vote for Kevin Patrick, you would send the message "87879 3" to that phone number.
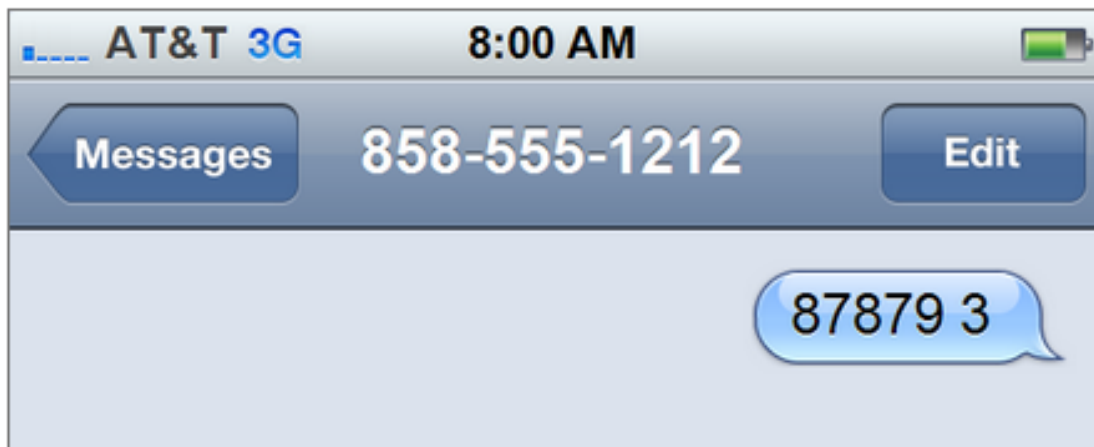
If you want to cast votes for multiple categories (or your organization allows you to vote more than once in a category) simply separate your votes with spaces. For example, if you wanted to vote for Kevin Patrick and Cindy Brady, you would send the text message "87879 3 6".
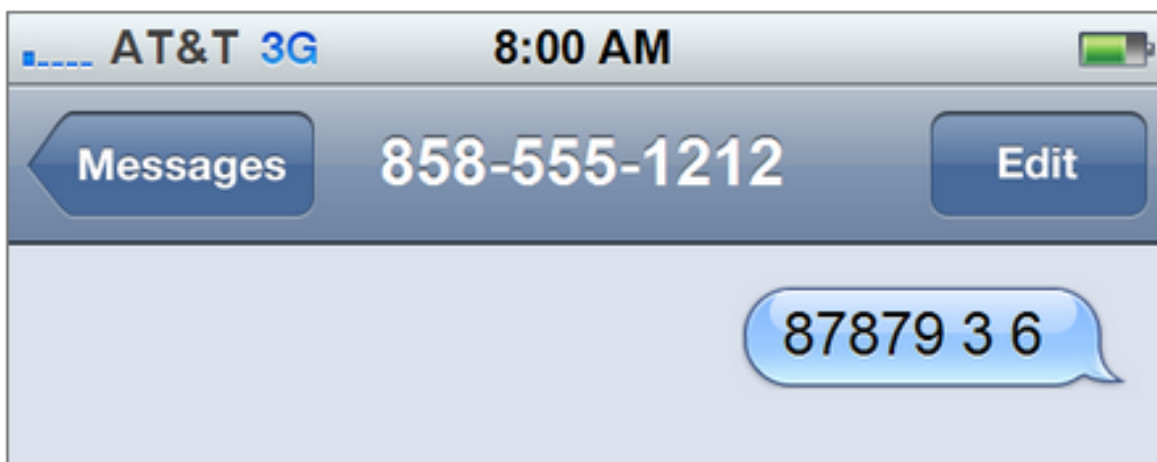
If your organization does *not* require an ID number, simply send your choices, separated by spaces, without including your ID number..