OnBase®
Foundation EP5

Agenda Voting

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Copyright

Information in this document is subject to change without notice. The software described in this document is furnished only under a separate license agreement and may be used or copied only according to the terms of such agreement. It is against the law to copy the software except as specifically allowed in the license agreement. This document or accompanying materials contains certain information which is confidential information of Hyland Software, Inc. and its affiliates, and which is subject to the confidentiality provisions agreed to by you.

All data, names, and formats used in this document's examples are fictitious unless noted otherwise. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright law, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Hyland Software, Inc. or one of its affiliates.

Hyland®, Hyland Software®, Hyland Healthcare, and Hyland product names are registered and/or unregistered trademarks of Hyland Software, Inc. and its affiliates in the United States and other countries. All other trademarks, service marks, trade names and products of other companies are the property of their respective owners.

© 2021 Hyland Software, Inc. and its affiliates. All rights reserved.

Document Name ..... Agenda Voting

Department/Group ..... Documentation

Revision Number ..... Foundation EP5

OVERVIEW

Applications **1**
Licensing **1**
Simplified Licensing 2
Legacy Licensing 2

INSTALLATION GUIDE

INSTALLATION

Requirements **4**
General Requirements 4
Licensing **4**
Upgrade Considerations **4**
Voting Client User Group Privileges 5
Installation **5**
Agenda Voting Installers **6**
Board Meeting Service Installation 7
Controlling the Installer from the Command Line 11
Using TLS/SSL with the Voting Service 13
Voting Client Installation 14
Controlling the Installer from the Command Line 17
Voting Display Client Installation 18
Controlling the Installer from the Command Line 21
Contacting Support **21**

ADMINISTRATION GUIDE

CONFIGURATION

Voting Client Configurations **24**
Configuring Standard or IdP Authentication 24
Configuring Voting Client Options 24
Voting Display Configurations **25**

USER GUIDE

USAGE

Voting Client **28**
Logging In to the Voting Client 29
Selecting Meetings 30
Understanding the Messages Displayed in the Voting Client 31
Voting Client Connection Messages 32

© 2021 Hyland Software, Inc. and its affiliates

Meeting Status Messages 32
Viewing Agenda Items 33
Viewing Agenda Details 34
Agenda Item Title 37
Documents 37
Motions 40
Speakers 41
Voting on Current Items 44
Moving or Seconding an Item 45
Voting on Items 46
Viewing Speaker Information 48
Speaker Controls 50
Voting Display 51
Logging in to the Voting Display 51
Viewing Meeting Information 53
Current Items 54
Motion Presented 55
Speaker Information 56
Motion Results 57

© 2021 Hyland Software, Inc. and its affiliates

Overview

Agenda Voting provides the ability to communicate the voting process of agenda items to the public. This solution allows voting members and support personnel the opportunity to electronically view items and supporting documentation on the agenda and to electronically cast votes on motions. The Voting solution also provides a more automated and effective approach to recording the events of the meeting to make it easy for the supporting personnel to follow along and manage the meeting as it is in session.

The Voting solution consists of six main applications that all work together to give you a seamless meeting process. The applications that work together include:

- **OnBase Agenda**. This is the application used to configure meeting members and meeting creation. See the **Agenda** module reference guide for more information.
- **OnBase Minutes**. This application allows the meeting administrator to run the meeting and voting processes. See the **Minutes** module reference guide for more information.
- **Voting Client**. This allows voting members and support personnel the opportunity to follow along with the meeting and to electronically cast votes on motions.
- **Voting Display**. This application provides the ability for the public to follow along with the meeting in the meeting room as it progresses.
- **Application Server**. This facilitates real-time communication among all the clients. See the **Application Server** module reference guide for more information.
- **Board Meeting service**. This facilitates real-time communication among all the clients.

Applications

Any organization that holds meetings can use Voting to revolutionize the meeting process. This solution allows members to submit their own votes, which reduces the amount of time spent by the meeting manager to solicit, record and save votes in the Minutes application.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Agenda Voting functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 2.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 2.

© 2021 Hyland Software, Inc. and its affiliates

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the OnBase Agenda add-on license is required to access standard Agenda Voting functionality.

Legacy Licensing

The **Agenda Voting** license is required.

Voting is used in conjunction with OnBase Minutes, so the **Agenda** license used to run OnBase Minutes is also required.

© 2021 Hyland Software, Inc. and its affiliates

OnBase®
Foundation EP5

Agenda Voting

Installation Guide

Foundation EP5

Requirements

Caution: If you are using a Sybase database with your Agenda Voting solution and require more than 32k of data in the agenda or section text fields, increase the TEXTSIZE server variable in your Sybase database.

The following sections outline requirement information specific to Agenda Voting in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Agenda Voting and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Supported Operating Systems
- Unity Client Web Browser Requirements
- Microsoft .NET Framework Requirements
- Databases Supported
- Database Client/Server Version Compatibility
- Microsoft Visual C++ Requirements
- Hyland Software - Microsoft Service Pack Statement
- About Virtual Environments
- Windows User Account Control Statement

Licensing

See Licensing on page 1 for licensing requirements.

Upgrade Considerations

The following information should be considered or noted when upgrading Agenda Voting deployments. Read this information prior to upgrading your version of the Agenda Voting application.

© 2021 Hyland Software, Inc. and its affiliates

Voting Client User Group Privileges

This version of Agenda Voting has additional Upgrade Considerations when upgrading to it from one of the following earlier versions:

- Any pre-Foundation releases prior to 18 SP 1, Build 250
- Foundation EP 1
- Foundation EP 2
- Foundation EP 3
- Foundation EP 4

When upgrading from any of these versions, you must ensure that all instances of Agenda Voting are also upgraded to the new version.

With this upgrade, privilege checks were added to the Voting service for security purposes. In order for the Voting Service to run, the User Group to which the Voting Service user is assigned must have the **Product Rights** |**Configuration** privilege enabled in OnBase Configuration. It should be the only product right needed.

Installation

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see http://msdn.microsoft.com/en-us/library/aa367988.aspx.

© 2021 Hyland Software, Inc. and its affiliates

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see http://technet.microsoft.com/en-us/library/cc759262(WS.10).aspx.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\"my value\" INSTALL_PROPERTY_2=\"my value 2\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Agenda Voting Installers

There are three installers available for Agenda Voting. Each installer must be run to ensure that all of the Agenda Voting functionality is available to Voting members and the viewing public.

- Board Meeting Service Installation on page 7
- Voting Client Installation on page 14
- Voting Display Client Installation on page 18

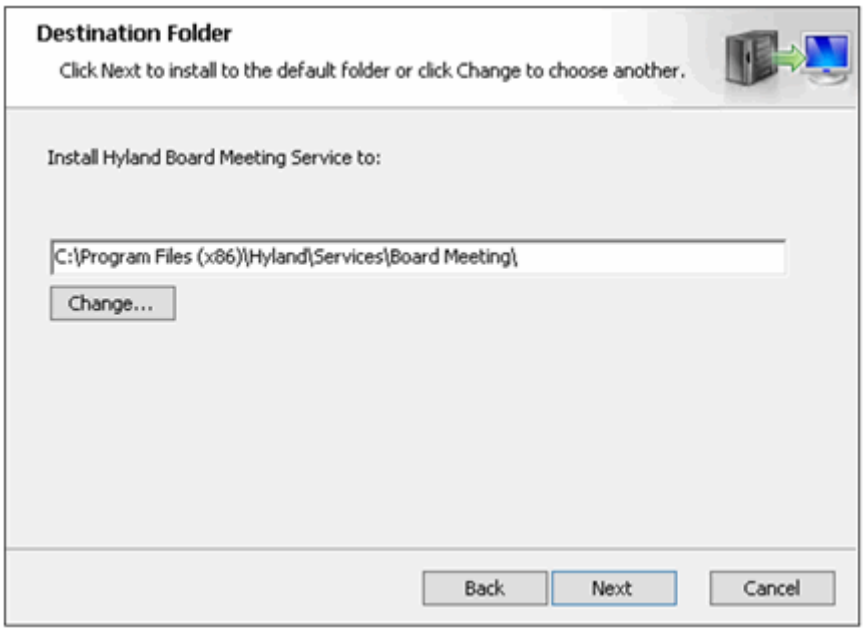
© 2021 Hyland Software, Inc. and its affiliates

Board Meeting Service Installation

The Board Meeting Service installer is located in the **install\BoardMeeting\Voting Service** folder of your OnBase Core Services build.

Note: This service should be installed in a location that the Voting Display client, Voting Clients and Minutes Clients can connect to. The official name of this service is **Hyland Board Meeting Service**, but is often referred to as the Voting Service.

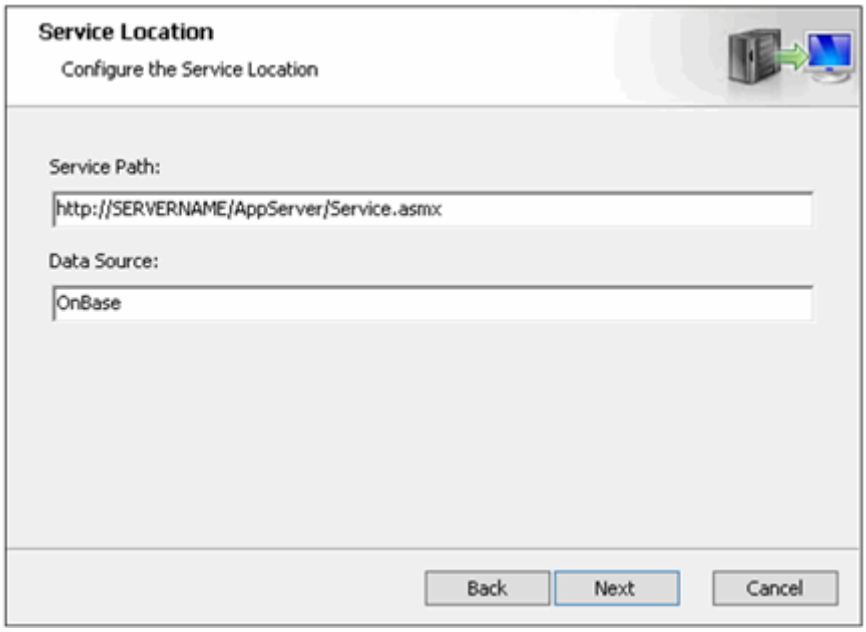
1. From the Voting Service directory, double-click the **setup.exe**.
2. Click **Next** at the **Welcome** dialog. The **Destination Folder** dialog box is displayed.



3. At the **Destination Folder** dialog box, select the local folder to which to install the components. By default, components are installed to **C:\Program Files\Hyland\Services\Board Meeting** (32-bit operating systems) or **C:\Program Files (x86)\Hyland\Services\Board Meeting** (64-bit operating systems). Click **Change** to select a different folder for the installation.

© 2021 Hyland Software, Inc. and its affiliates

4. Click **Next**. The **Service Location** dialog box is displayed.



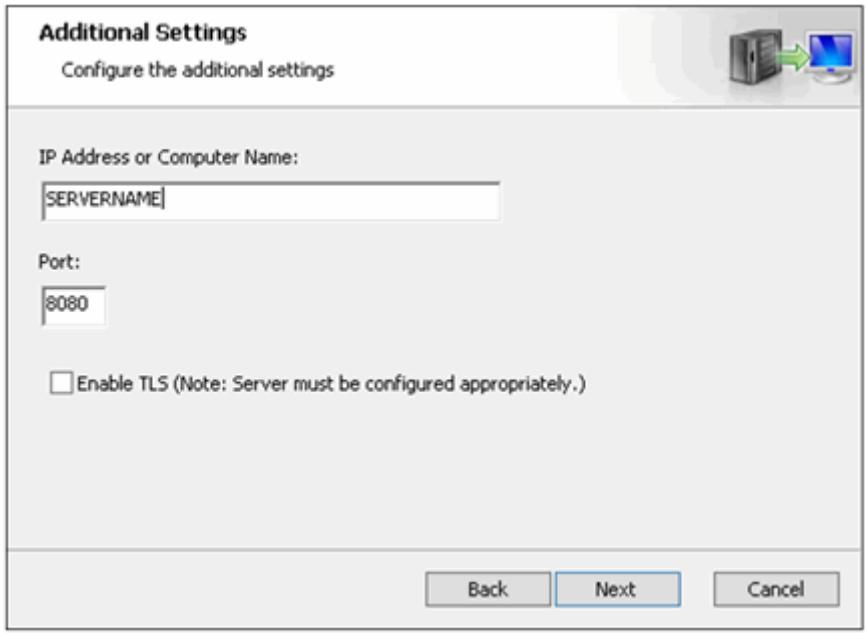
Specify the following:

Setting Name	Description
Service Path	Type the server name and the application server name to complete the path to the service.
Data Source	Type the data source name (configured at the Application Server) that Voting will connect to, for example, OnBase.

© 2021 Hyland Software, Inc. and its affiliates

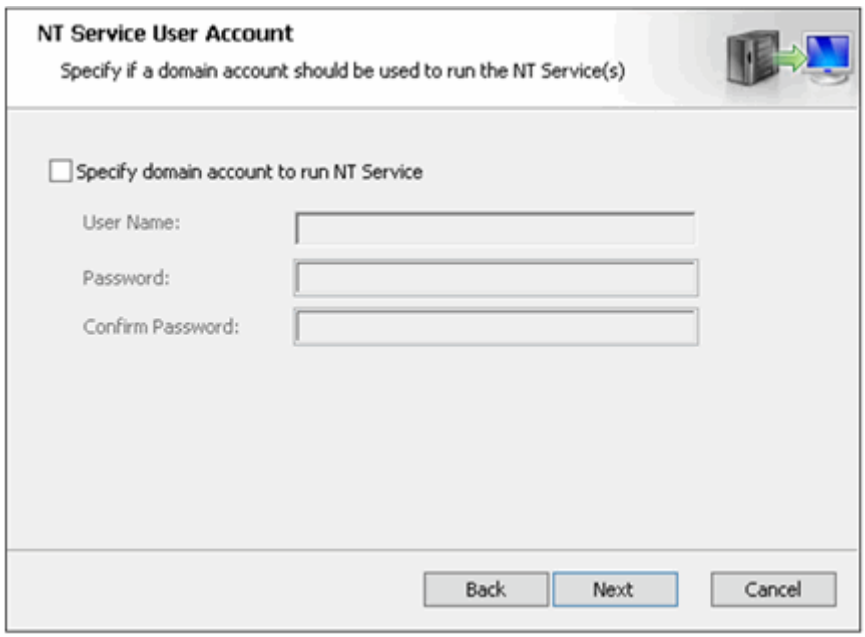
5. Click **Next**. The **OnBase Account** dialog box is displayed.

6. In the **User Name** field, type the name of a user that has been configured in OnBase. This user account is not a Service account, rather a regular OnBase user for which you can define the permissions. This user will be used to log in to the Board Meeting Service.
7. In the **Password** and **Confirm Password** fields, type the password for the OnBase user.
8. Click **Next**. The **Additional Settings** dialog box is displayed.



© 2021 Hyland Software, Inc. and its affiliates

9. Do the following in the **Additional Settings** dialog box:
   - In the **IP Address or Computer Name** field, type the IP address or computer name where the Board Meeting service will be installed.
   - Ensure that the port in the Port field is set to the proper value.
   - Select the **Enable TLS** check box to allow the connection between the Voting Service and the Voting Client/Voting Display Client to be configured securely. See Using TLS/SSL with the Voting Service on page 13 for more information on securing this connection.
10. Click **Next**. One of the following happens depending on if you selected the Use TLS/SSL option:
    - If the Enable TLS option is selected, the **NT Service User Account** dialog box is displayed.



Select the check box to specify a domain account to run the NT Service, and then type the user name and password in the appropriate fields. This step can also be skipped if necessary.

© 2021 Hyland Software, Inc. and its affiliates

- If the Use TLS/SSL option is not selected, the **Unsecured Connection Risks** dialog box is displayed.

  This dialog box lists the potential risks when not using TLS/SSL. Select the check box to acknowledge the risks and to continue with the installation.

11. Click **Next**. The **Ready to Install Hyland Voting Service** dialog box is displayed.
12. Click **Install**. The Voting Service is installed.
13. Upon completion, click **Finish** to complete the process and close the installation dialog box.

Note: To allow the Voting Client to connect with OnBase Minutes, the BoardMeeting Service must be started.

Controlling the Installer from the Command Line

The Voting Service installer can be run from an installation CD or a local drive. The following properties can be applied to the command line to configure Voting Service settings:

Property Name	Description
CREATE_DESKTOP_SHORTCUTS	Set this property to 1 to create a Desktop shortcut. If a Desktop shortcut should not be created, leave this property empty.
CREATE_MENU_SHORTCUTS	Set this property to 1 to create a Program Menu shortcut. If a Program Menu shortcut should not be created, leave this property empty.

© 2021 Hyland Software, Inc. and its affiliates

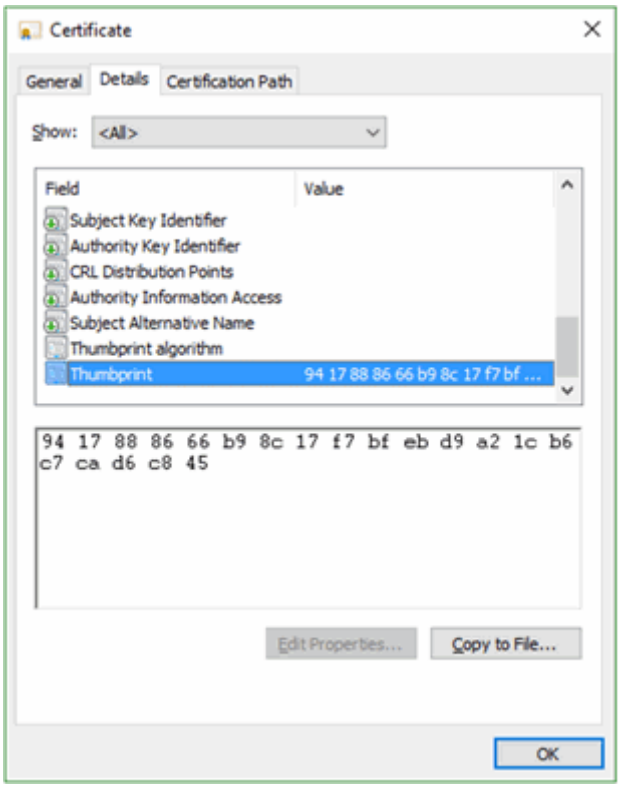
Property Name	Description
HOST_SERVER_URL	Set this property to the URL of the host server. The format is http://<servername>:<port number>.
OB_ACCOUNT_USER	Set this optional property to the name of the OnBase Account.
OB_ACCOUNT_PASS	Set this optional property to the password for the OnBase Account.
VOTINGSERVICE_SSL	Set this property to 1 to use TLS/SSL. Otherwise, set this to 0.
NTSERVICE_USE_DOMAIN_ACCOUNT	Set this property to 1 to use a specified domain account. If a domain account is not used, set this property to 0.
DATASOURCE	Set this property to the name of the ODBC that should be used. For example, OnBase.
APPLICATION_SERVER_URL	Set this property to the URL to the application server.
VOTINGSERVICE_ADDRESS	Set this property to the Server Address to be used with the Voting Service.
VOTINGSERVICE_PORT	Set this property to the Server Port to be used with the Voting Service.

© 2021 Hyland Software, Inc. and its affiliates

Using TLS/SSL with the Voting Service

Typically, the messages sent and received between OnBase Minutes and the Voting Client and Voting Client Display are in plain text, when not using TLS/SSL. You can securely configure the connection between the service and each Client application using TLS/SSL by doing the following:

1. Locate the hash or thumbprint of your certificate. This is found on the **Details** tab of the certificate, and is typically located by scrolling down to the bottom of the list.



Note: The hash/thumbprint can be copied from here, but be aware that to use this value, the spaces between the character pairs need to be removed.

2. Open a command prompt as an administrator.
3. Run one of the following command lines after inserting the hash/thumbprint:
   - `netsh http add sslcert ipport=0.0.0.0:8080 certhash=[insert hash/thumbprint value here] appid={acbeef11-b84f-4fe3-8359-ca6c28b107dc}`
   - `netsh http add sslcert hostnameport=[server name here]:8080 certhash=[hash/thumbprint value here] appid={acbeef11-b84f-4fe3-8359-ca6c28b107dc} certstorename=MY`

© 2021 Hyland Software, Inc. and its affiliates

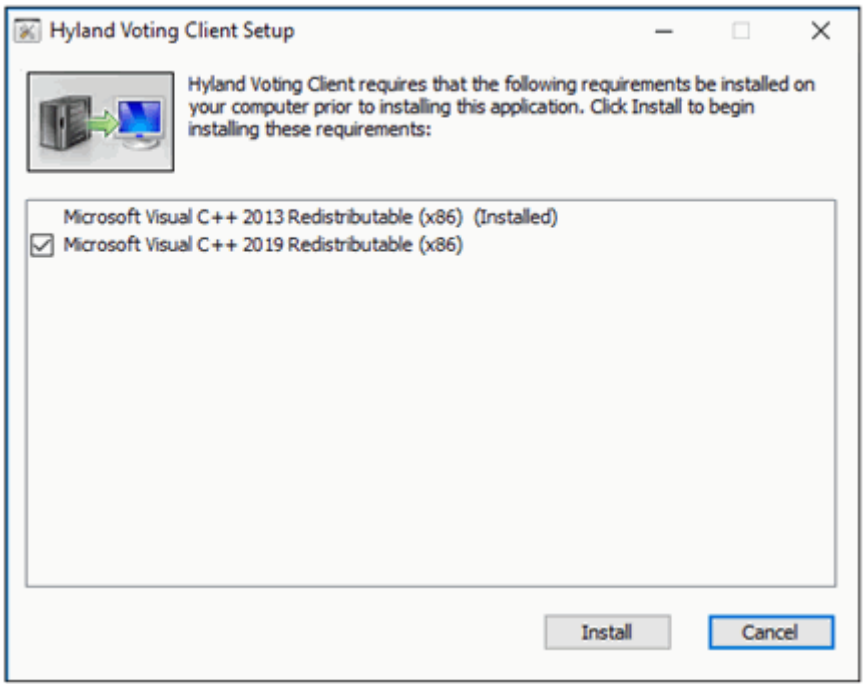
4. In the **BoardMeetingService.exe.config** file, locate the `Hyland.BoardMeeting.Service/Application` section and do the following:
   - Ensure that the ServerAddress matches the name of the server in the certificate.
   - Ensure that the `AllowInsecureConnections` setting is set to **false** (this is the default value, but only if the Enable TLS check box is selected during the installation).
5. Start the Hyland Board Meeting Service.
6. In the config file for each Client application, locate the `Hyland.Applications.PushNotification/HostServer` section and set the url setting to include https, along with the same server name from the certificate.

Voting Client Installation

The Voting Client installer is located in the **install\BoardMeeting\Voting Client** folder of your OnBase Core Services build.

Note: The client application must be installed on each board member's device used for voting during a meeting.

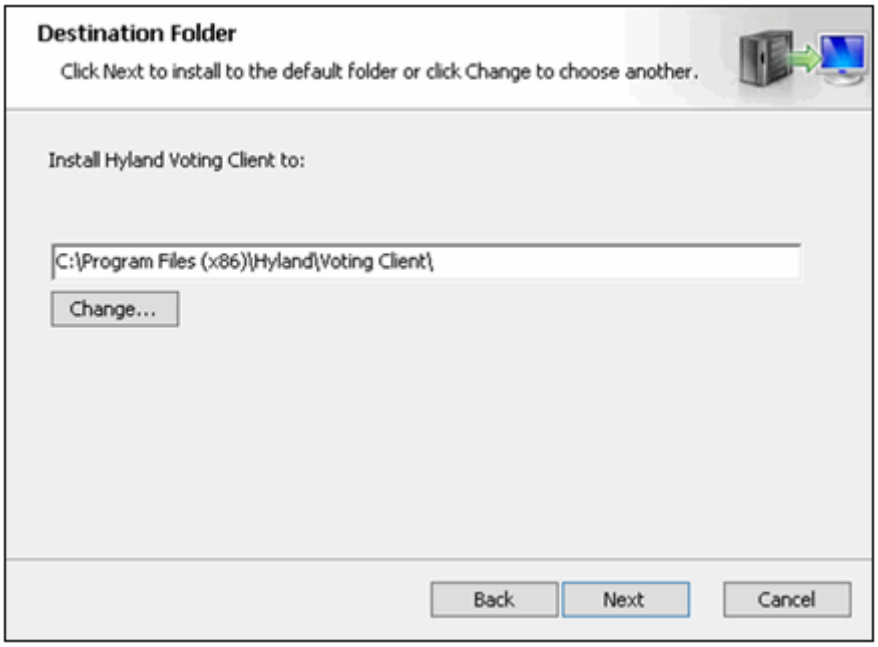
1. From the Voting Client directory, double-click the **setup.exe**.
   If Microsoft Visual C++ 2019 Redistributable (x86) is not installed on your machine, a dialog box is displayed allowing you to install the necessary component.



   Click **Install** to install the components.

© 2021 Hyland Software, Inc. and its affiliates

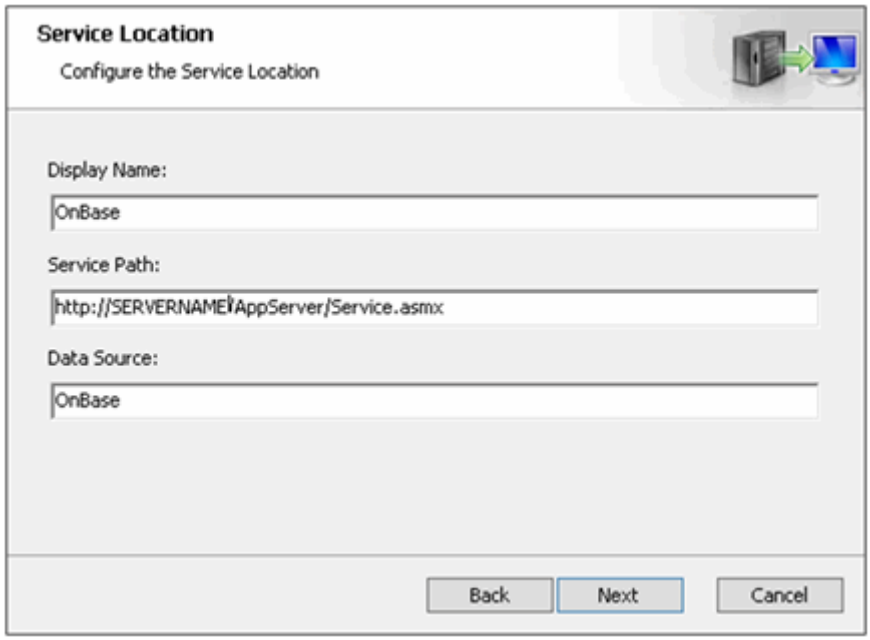
2. Click **Next** at the **Welcome** dialog. The **Destination Folder** dialog box is displayed.



3. At the **Destination Folder** dialog box, select the local folder to which to install the components. By default, components are installed to **C:\Program Files\Hyland\BoardMeeting\Voting Client** (32-bit operating systems) or **C:\Program Files (x86)\Hyland\BoardMeeting\Voting Client** (64-bit operating systems). Click **Change** to select a different folder for the installation.

© 2021 Hyland Software, Inc. and its affiliates

4. Click **Next**. The **Service Location** dialog box is displayed.

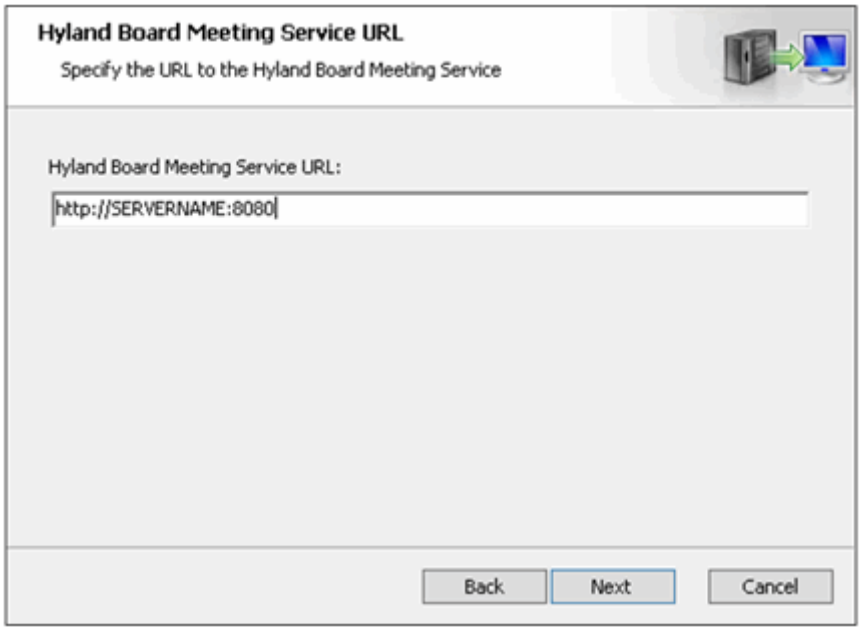


Specify the following:

Setting Name	Description
Display Name	Type the display name of the service location. For example, OnBase.
Service Path	Type the server name and the application server name to complete the path to the service.
Data Source	Type the data source name (configured at the Application Server) that Voting will connect to, for example, OnBase.

© 2021 Hyland Software, Inc. and its affiliates

5. Click **Next**. The **Hyland Board Meeting Service URL** dialog box is displayed.



   This is the URL to the hosting server. This path typically includes the server name and port number. The format is the following: http://<servername>:<port number>.
6. Click **Next**. The **Ready to Install Hyland Voting Client** dialog box is displayed.
7. Click **Install**. The Voting Client is installed.
8. Upon completion, click **Finish** to complete the process and close the installation dialog box.

Controlling the Installer from the Command Line

The Voting Client installer can be run from an installation CD or a local drive. The following properties can be applied to the command line to configure Voting Client settings:

Property Name	Description
CREATE_DESKTOP_SHORTCUTS	Set this property to 1 to create a Desktop shortcut. If a Desktop shortcut should not be created, leave this property empty.
CREATE_MENU_SHORTCUTS	Set this property to 1 to create a Program Menu shortcut. If a Program Menu shortcut should not be created, leave this property empty.
SERVICE_LOCATION_DATE_SOURCE	Set this property to the data source name (configured at the Application Server) that the Voting Client will connect to, for example, OnBase.

© 2021 Hyland Software, Inc. and its affiliates

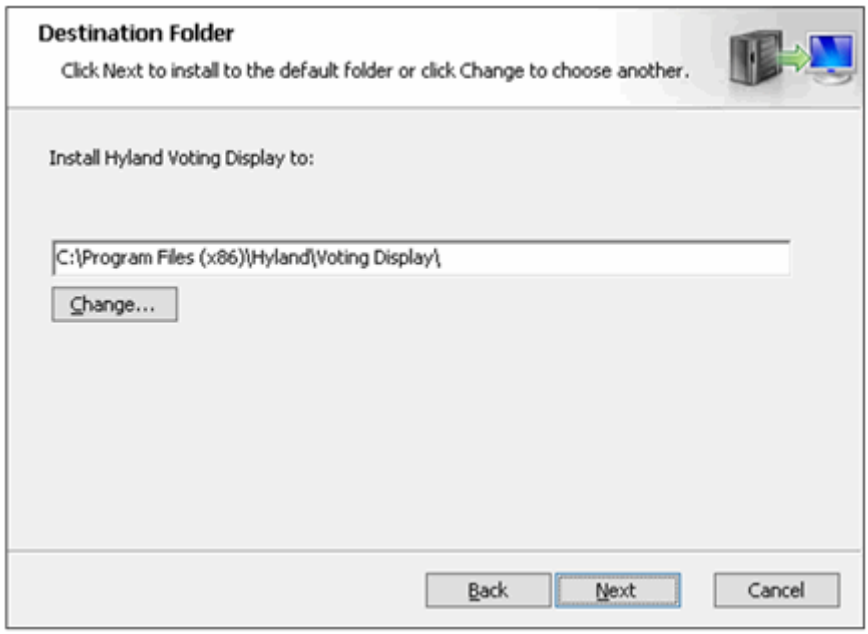
Property Name	Description
SERVICE_LOCATION_DISPLAY_NAME	Set this property to the display name of the service location. For example, OnBase.
SERVICE_LOCATION_SERVICE_PATH	Set this property to the Service.asmx page of the Application Server.
HOST_SERVER_URL	Set this property to the URL of the host server. The format is http://<servername>:<port number>.

Voting Display Client Installation

The Voting Display Client installer is located in the **install\BoardMeeting\Voting Display** folder of your OnBase Core Services build.

Note: The client should be installed on a Windows machine that is connected to a publicly displayed monitor so those attending the meeting can view the progress of the meeting.

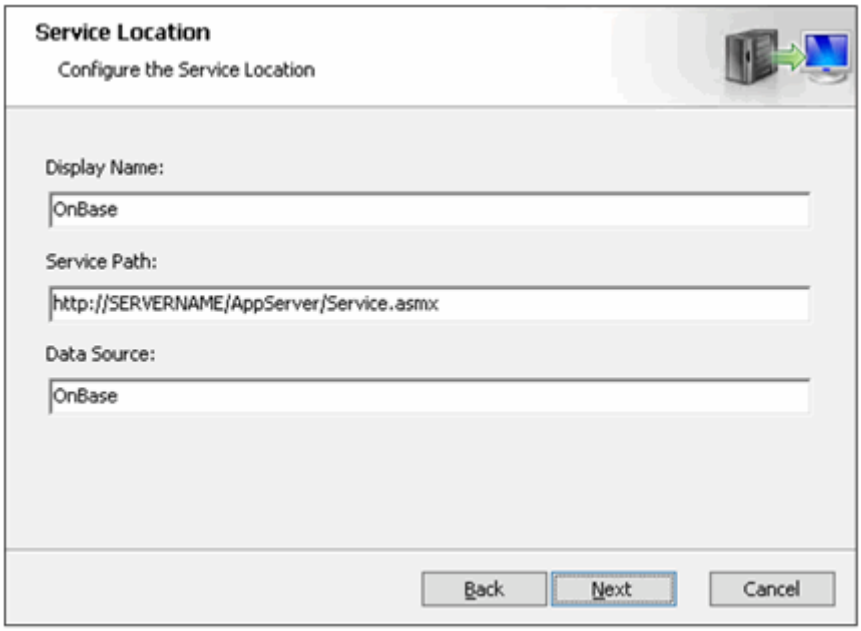
1. From the Voting Display directory, double-click the **setup.exe**.
2. Click **Next** at the **Welcome** dialog. The **Destination Folder** dialog box is displayed.



3. At the **Destination Folder** dialog box, select the local folder to which to install the components. By default, components are installed to **C:\Program Files\Hyland\BoardMeeting\Voting Display** (32-bit operating systems) or **C:\Program Files (x86)\Hyland\BoardMeeting\Voting Display** (64-bit operating systems). Click **Change** to select a different folder for the installation.

© 2021 Hyland Software, Inc. and its affiliates

4. Click **Next**. The **Service Location** dialog box is displayed.

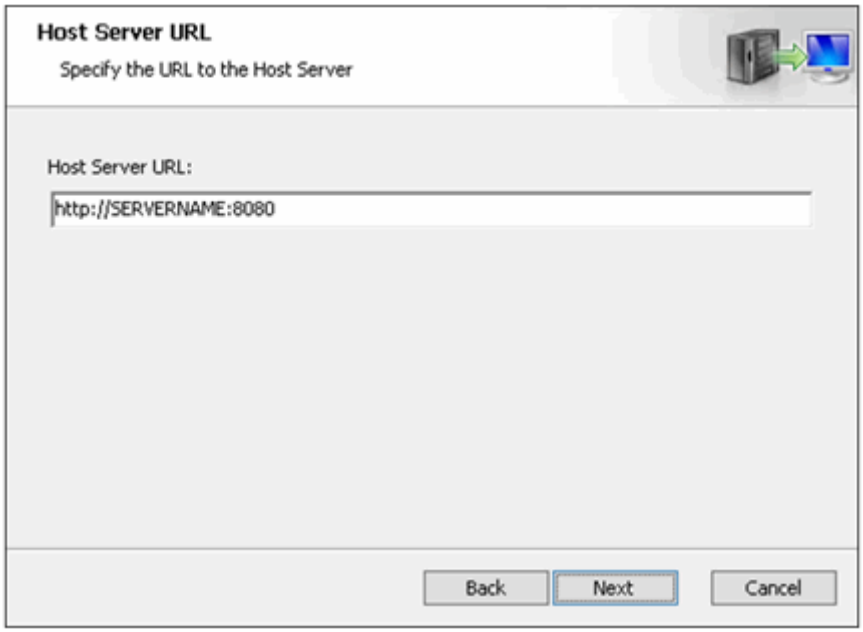


Specify the following:

Setting Name	Description
Display Name	Type the display name of the service location. For example, OnBase.
Service Path	Type the server name and the application server name to complete the path to the service.
Data Source	Type the data source name (configured at the Application Server) that Voting will connect to, for example, OnBase.

© 2021 Hyland Software, Inc. and its affiliates

5. Click **Next**. The Host Server URL dialog box is displayed.



This is the URL to the hosting server. This path typically includes the server name and port number. The format is the following: http://<servername>:<port number>.

6. Click **Next**. The **OnBase Account** dialog box is displayed.

7. Type your OnBase user name/password credentials in the appropriate fields.
8. Click **Next**. The **Ready to Install Hyland Voting Display Client** dialog box is displayed.

© 2021 Hyland Software, Inc. and its affiliates

9. Click **Install**. The Voting Display is installed.
10. Upon completion, click **Finish** to complete the process and close the installation dialog box.

    A message is displayed indicating that the credentials were properly configured. Press the **Esc** key to close the window.

Controlling the Installer from the Command Line

The Voting Display Client installer can be run from an installation CD or a local drive. The following properties can be applied to the command line to configure Voting Display Client settings:

Property Name	Description
CREATE_DESKTOP_SHORTCUTS	Set this property to 1 to create a Desktop shortcut. If a Desktop shortcut should not be created, leave this property empty.
CREATE_MENU_SHORTCUTS	Set this property to 1 to create a Program Menu shortcut. If a Program Menu shortcut should not be created, leave this property empty.
SERVICE_LOCATION_DATE_SOURCE	Set this property to the data source name (configured at the Application Server) that the Voting Client will connect to, for example, OnBase.
SERVICE_LOCATION_DISPLAY_NAME	Set this property to the display name of the service location. For example, OnBase.
SERVICE_LOCATION_SERVICE_PATH	Set this property to the Service.asmx page of the Application Server.
HOST_SERVER_URL	Set this property to the URL of the host server. The format is http://<servername>:<port number>.
OB_ACCOUNT_USER	Set this optional property to the name of the OnBase Account.
OB_ACCOUNT_PASS	Set this optional property to the password for the OnBase Account.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.

© 2021 Hyland Software, Inc. and its affiliates

- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

© 2021 Hyland Software, Inc. and its affiliates

OnBase®
Foundation EP5

Agenda Voting

Administration Guide

Both the Voting Client and the Voting Display have a few options that can be configured. Configurations can be modified in the config files for each application.

Voting Client Configurations

Items that can be configured in the Voting Client include:

- Standard and IdP Authentication
- Font size
- Window option
- Number of Agenda Line Items to display

All configurations take place in the ObVotingClient.exe.config file. This file can be located in the **C:\Program Files (x86)\Hyland\BoardMeeting\Voting Client** directory on your local drive.

Configuring Standard or IdP Authentication

When you login to the Voting Client, you can login using either the Standard Authentication or the Hyland Identity Provider (IdP) server.

You can specify the option you want to use in the `<ServiceLocations>` section in the ObVotingClient.exe.config file.

See the **Identity and Access Management Services** module reference guide for more information.

Configuring Voting Client Options

All configurations take place in the ObVotingClient.exe.config file. This file can be located in the **C:\Program Files (x86)\Hyland\BoardMeeting\Voting Client** directory on your local drive.

To configure options in the Voting Client:

1. Open the Voting Client configuration file.
2. Locate the `<Hyland.VotingClient>` section.

© 2021 Hyland Software, Inc. and its affiliates

3. In the Application Settings, there are three configuration options as follows:
   - `FontSizeScale`. Increase or decrease the size of the font used in the application. The default value is 0. The larger the value, the larger the font size in the Voting Client.
   - `WindowStateOption`. There are three values that can be entered:
     - **Normal**. The application opens in a normal window.
     - **Maximized**. The application opens in a maximized state.
     - **FullScreen**. The application opens in Full Screen mode and cannot be minimized or maximized.
   - `ItemLinesToShow`. Enter the number of lines an item title displays before it is collapsed. The minimum value is 2.
4. Modify the settings as needed, and then click the **Save** icon.

Voting Display Configurations

Items that can be configured in the Voting Display include:

- Override directory
- Scrolling speed
- Minutes to display the meeting upon completion

All configurations take place in the VotingDisplay.exe.config file. This file can be located in the **C:\Program Files (x86)\Hyland\BoardMeeting\Voting Display** directory on your local drive.

To configure options in the Voting Display:

1. Open the Voting Display configuration file.
2. Locate the `<Hyland.VotingDisplay>` section.
3. In the Views settings, there are four configuration options as follows:
   - `OverrideDirectory`. This allows you to override styles that have been added to the Voting Client. If you have your own .cshtml files with styling options for the Voting Display Client, you can enter the path to the files here. This directory will need to be a sub directory inside the Views folder. Otherwise, the default is Overrides. Each node under the Views node is named accordingly. Set the override attribute to "true" to enable the style, or leave it at "false" to use the default view.
   - `ScrollSpeedVertical`. If the text is too long in the Display, the vertical scrolling option is enabled. You can control the scrolling speed by modifying this setting. The larger the number, the slower the scrolling.

© 2021 Hyland Software, Inc. and its affiliates

- `ScrollSpeedHorizontal`. If the text is too wide in the Display, the horizontal scrolling option is enabled. You can control the scrolling speed by modifying this setting. The larger the number, the slower the scrolling.

Note: This setting applies to the Voting Results screen, and is used when a voting name is used when a voting name is too long, or when there are several voters.

- `ScrollEndPause`. When scrolling reaches the end of the horizontal or vertical display, this value controls how long the pause is before the text continues to scroll. This value is in milliseconds.

4. To configure the minutes to display the meeting upon completion, in the `<Hyland.VotingDisplay>` section, locate the <Timeouts> settings.
5. Set the `AfterMeetingEndedDefault Minutes` option to the value you want. The default value is 60. After the time expires, the display returns to the default screen.
6. Click **Save** to save the configuration file.

There are additional configuration options that provide the ability to customize the Voting Display for your specific environment. Customization options include:

- The option to display the long or short title of agenda items
- The option to display the speaker position

The configurations for these items are found in .cshtml files in the following location:

`C:\Program Files (x86)\Hyland\BoardMeeting\Voting Display\Views`

Once a .cshtml file has been changed, you should move the modified file into the Shared directory. When an upgrade occurs, files in the Shared directory will override the default values, and your customizations will not be replaced.

To modify settings in the .cshtml files:

1. Navigate to the directory listed above.
2. Depending on what you want to customize, access one of the following .cshtml files:
   - **SpeakerDisplay.cshtml**. Allows you to display the Speaker position. Locate the class section that contains the following string: `STR_AM_VDC_POSITION`. This section has been commented out. Remove the following: <!-- and --> from around the section to display the speaker position on the Voting Display.
   - **_Items.cshtml**. Allows you to modify whether the short or long title for an agenda item is displayed. By default, the short title is displayed. To display the long title, locate the @item.Title class. Modify the class to @item.LongTitle. The long title for the agenda item will be displayed on the Voting Display.

© 2021 Hyland Software, Inc. and its affiliates

OnBase®
Foundation EP5

Agenda Voting

User Guide

Foundation EP5

There are several parts to the Voting solution as described in the Overview on page 1. The two parts that provide a method for users to participate in the Voting process are the **Voting Client** and the **Voting Display**.

The **Voting Client** provides the ability for voting members to cast votes on motions from their own screen. Members can also view documents associated with agenda items, as well as view the motion results taken on agenda items. If a member has been assigned the Chairperson role, they have a couple controls that normal meeting members do not have.

The **Voting Display** provides the opportunity for the public to view agenda items, motions made on the items, and the results of the vote on those motions on a large screen or projection inside the meeting room.

Voting Client

Before the Voting Client can be used, there are actions in OnBase Agenda that must be taken. These actions include:

- Enable Voting on a meeting level.
- Link members to OnBase users in Agenda Administration.
- The user group that voting members belong to must also have read/view rights to the meeting type in Agenda Administration.

All of these settings are described in the **Agenda** module reference guide.

© 2021 Hyland Software, Inc. and its affiliates

Logging In to the Voting Client

To log in to the Voting Client:

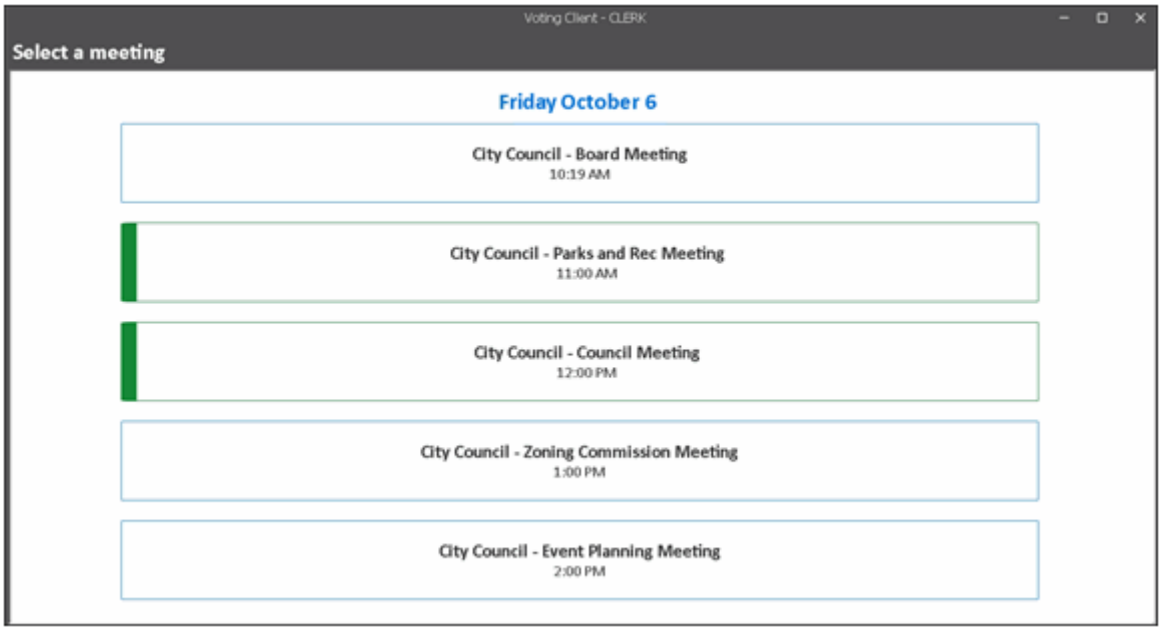
1. Double-click the **Voting Client** icon. The Login dialog box is displayed.
2. Type your user name and password in the appropriate fields, and then click the **Login** arrow. The **Voting Client** screen is displayed.

© 2021 Hyland Software, Inc. and its affiliates

Selecting Meetings

The main screen displays any meetings that have been enabled for Voting, and that are scheduled for today's date. If there are no meetings scheduled for today, the Voting Client indicates that no meetings are scheduled for today's date.

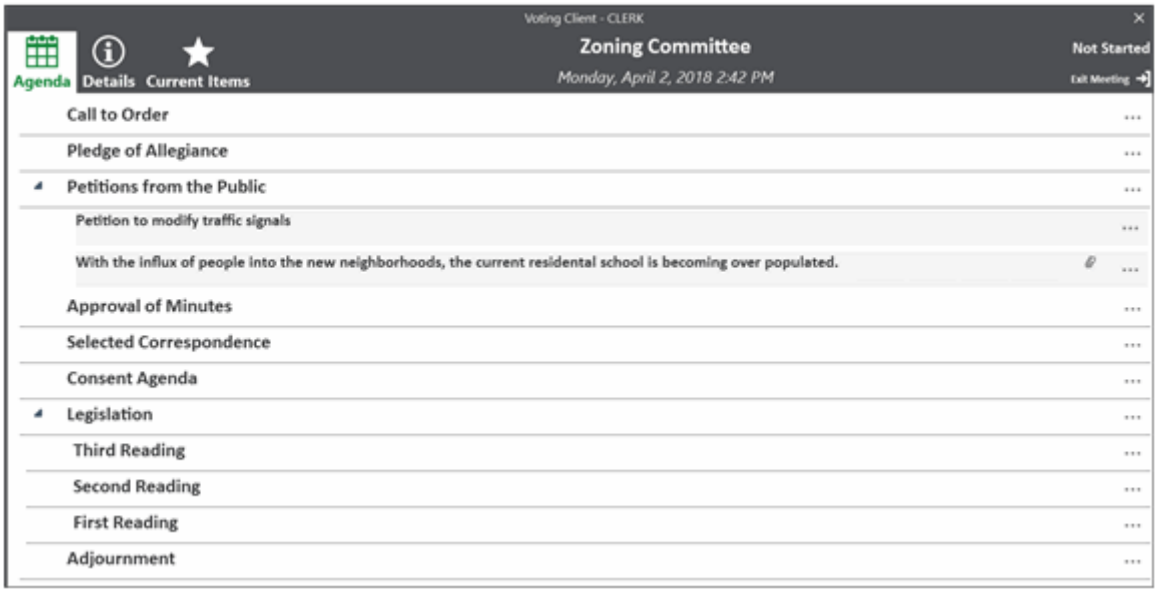
Note: If the `AllowMeetingSearch` option in the Voting Client config file is enabled, the option to select meetings by month or by year is available in a drop-down list. See Voting Client Configurations on page 24 for more information.



Note: A green bar is displayed next to meetings that are either in progress or due to start in the next hour.

© 2021 Hyland Software, Inc. and its affiliates

Click the meeting you want to view. The meeting contents are displayed.



Understanding the Messages Displayed in the Voting Client

When you select a meeting, different messages display depending on the status of the meeting. There are two different types of messages:

- Highlighted messages indicate the status of the Voting Client connection to the meeting
- Messages in the upper-right corner of the screen indicate the status of the meeting.

© 2021 Hyland Software, Inc. and its affiliates

Voting Client Connection Messages

Voting Client connection messages include:

- **Waiting for meeting owner to join**. This indicates that the meeting owner has not selected the Run Meeting option in OnBase Minutes.

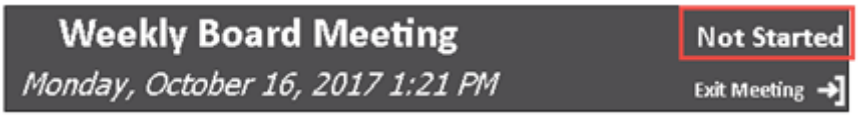
- **Connecting to meeting**. This message is displayed when the Voting Client is attempting to connect to a meeting.

- **User already joined to meeting, connection denied**. This message is displayed when the user logged in to the Voting Client is already joined to the meeting from another client.

Meeting Status Messages

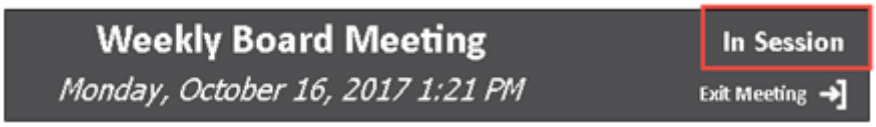
Meeting Status messages include:

- **Not Started**. This is the initial status of any meeting when opened in the Voting Client.

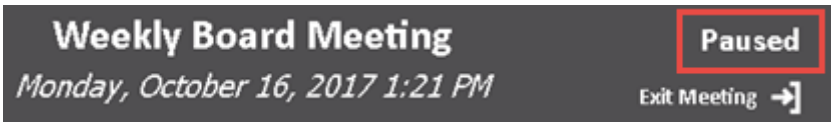


© 2021 Hyland Software, Inc. and its affiliates

- **In Session**. The meeting has been started and is currently in session.



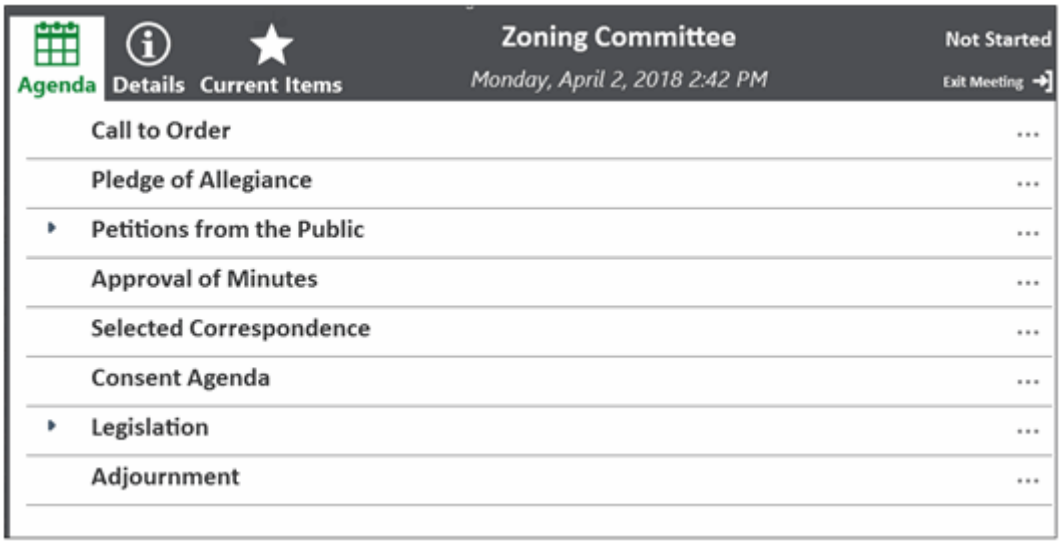
- **Paused**. The meeting is in a paused state.



Note: If a user joins the meeting late, it brings them to the exact location based on what is occurring in OnBase Minutes.

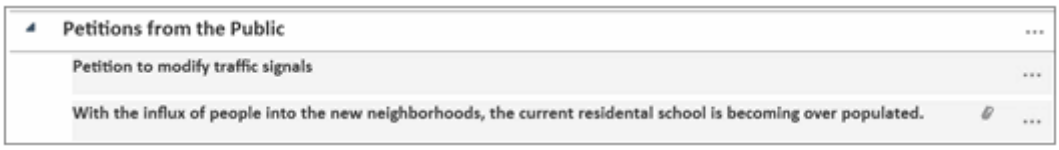
Viewing Agenda Items

Agenda sections and items are listed on the Agenda tab in the Voting Client.



Note the following:

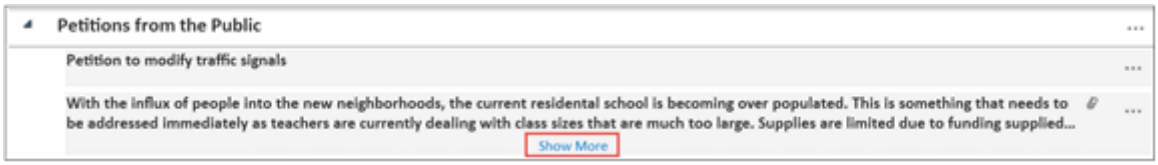
- If a section has sub-items or sub-sections, an arrow is displayed. Click the arrow, or click the agenda section to display the sub-items.



© 2021 Hyland Software, Inc. and its affiliates

- If you log into a meeting in progress, an item that has been set as current is displayed with a vertical green bar next to it. See Voting on Current Items on page 44 for more information.

- Some agenda items may have a lengthy title. If the title is too long to be fully displayed in the Agenda, a **Show More** option is displayed.



  Click **Show More**, or anywhere on the item, expands the item allowing you to view the entire contents of the Item title. A **Show Less** option is displayed when the full contents of the title is displayed, allowing you to collapse the title back down to the number of lines configured to display in the Agenda tab and the Current Items tab. See Voting Client Configurations on page 24 for more information.

Viewing Agenda Details

Agenda sections and Agenda items may have more details, such as motions, attached supporting documents and speakers.

If objects are available to view for an agenda item or section, icons display by the item or section name.

One or more of the following icons may be displayed:

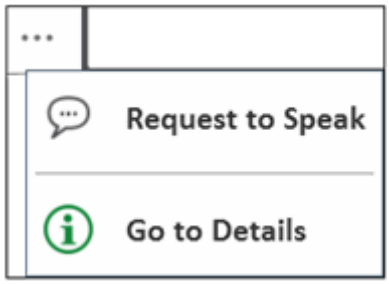
Icon	Description
	This icon indicates that there are one or more attachments available for this agenda item.

© 2021 Hyland Software, Inc. and its affiliates

Icon	Description
	This icon indicates that there are one or more motions saved for this item.
	This icon indicates that a meeting member has requested to speak, and is in the queue for this item.
	This icon indicates that there are one or more public or member speakers waiting to speak on an item.

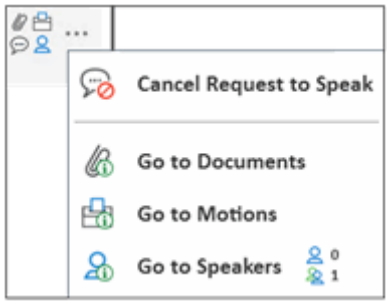
To view agenda details, select the **Ellipsis** button next to the Agenda Item. Depending on if there are speakers or motions available, you will see one of the following:

- If there are no speakers, attachments or motions available, when you click the **Ellipsis** button, the following is displayed:



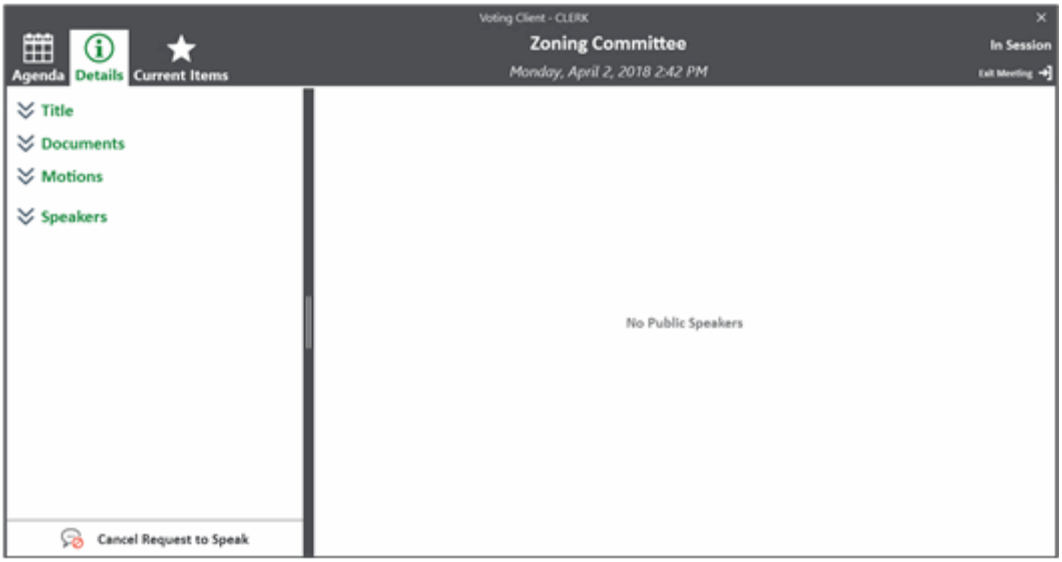
Note: The **Go to Details** option is displayed only if there are no documents, motions and speakers available for the agenda section or item.

- If speakers, attachments or motions are available, when you click on the **Ellipsis** button, the following is displayed:



© 2021 Hyland Software, Inc. and its affiliates

Select either **Go to Details**, **Go to Documents**, **Go to Motions** or **Go to Speakers**. The **Details** tab is displayed.



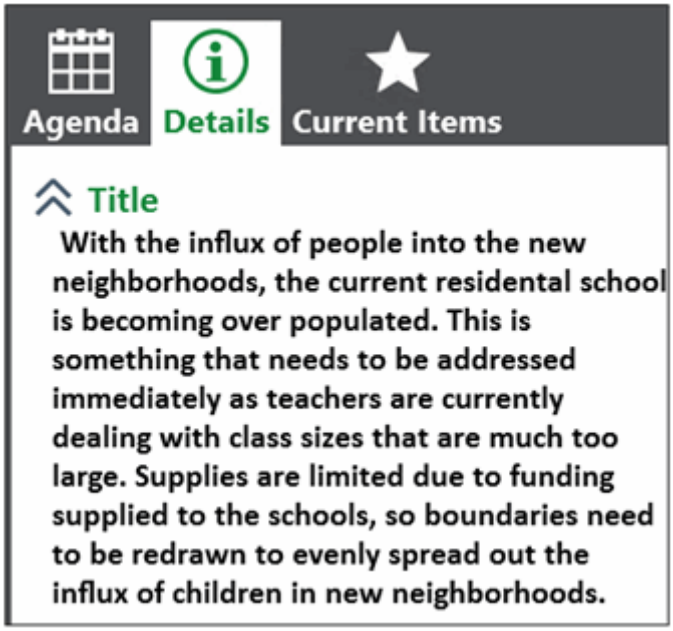
Details that can be viewed in the Details tab include:

- Agenda Item Title on page 37
- Documents on page 37
- Motions on page 40
- Speakers on page 41

© 2021 Hyland Software, Inc. and its affiliates

Agenda Item Title

The full agenda item title can be displayed on the **Details** tab. Click the arrows next to the **Title** to view the text. Click the arrows again to collapse the text.



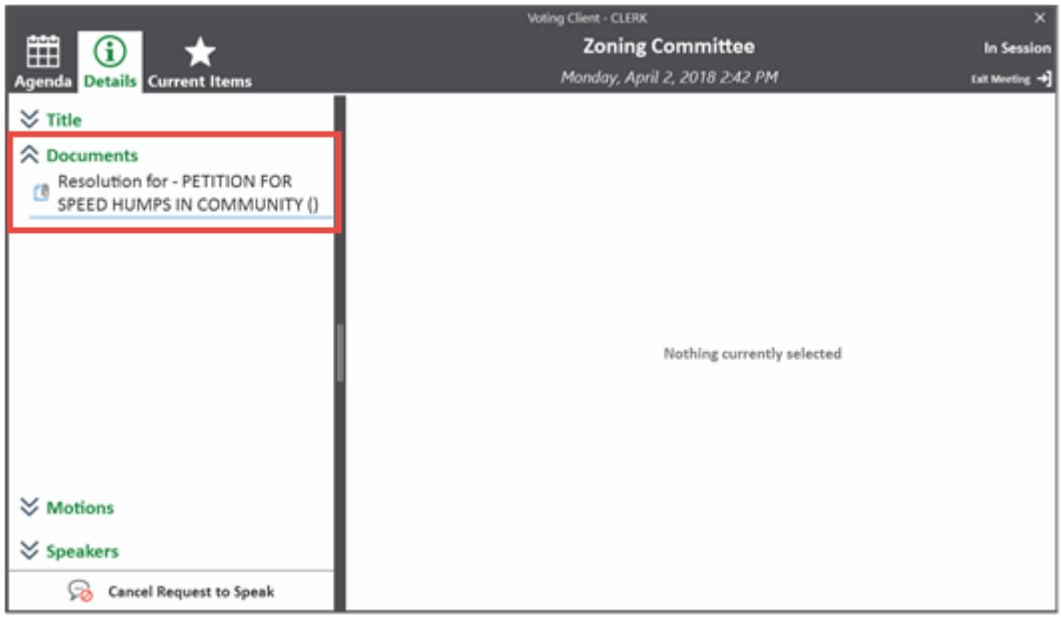
Documents

If documents are attached to the agenda item, they can be viewed in the **Details** tab.

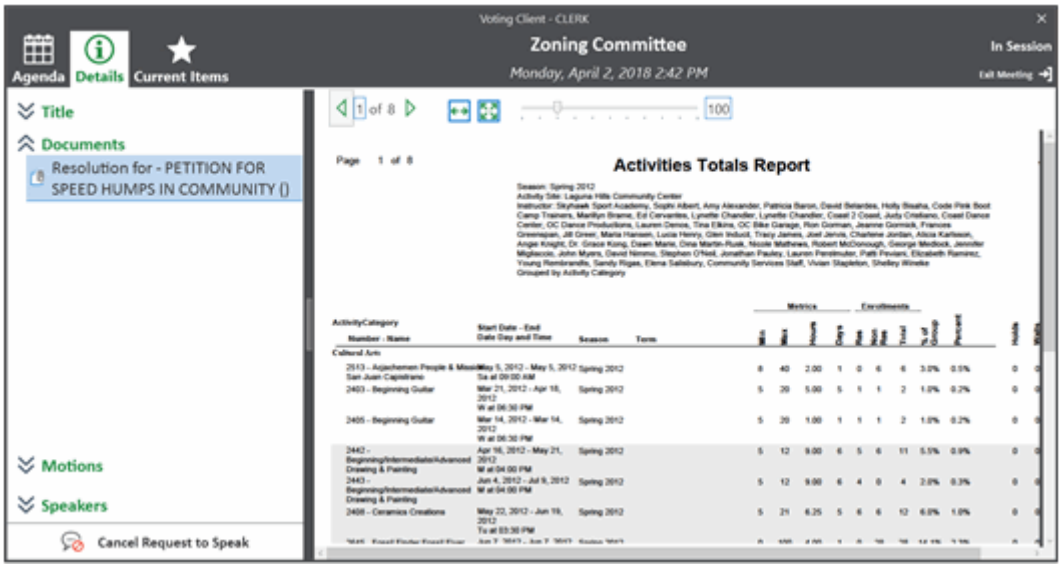
© 2021 Hyland Software, Inc. and its affiliates

To view documents:

1. Select the arrows next to the **Documents** link. Any attached documents are displayed.

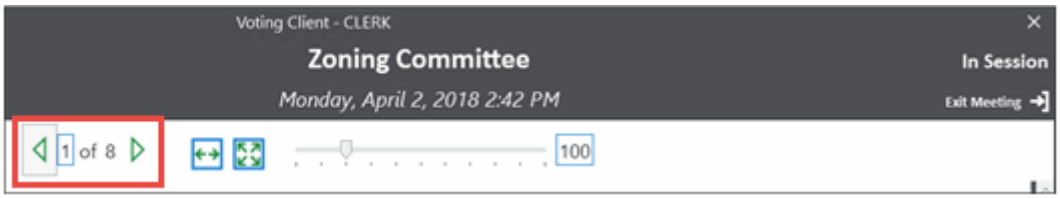


2. Click the document name. The first page of the document is displayed in the right pane.



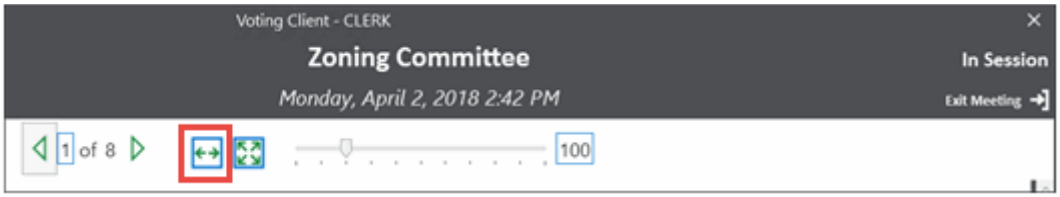
© 2021 Hyland Software, Inc. and its affiliates

3. Do any of the following to view the document:
   - If the document has more than one page, use the arrows located in the top-left corner of the document to view all the pages of the document. If you are using a mobile device, you can swipe either left or right to view the pages in the document.

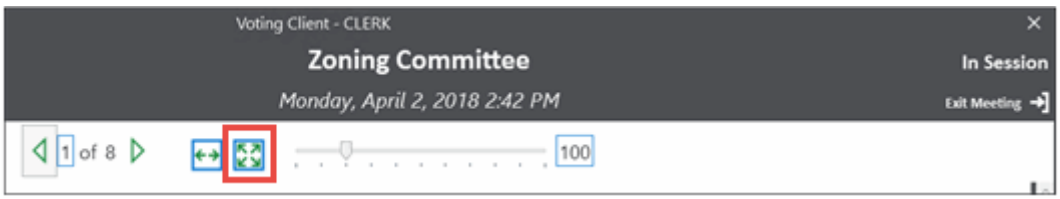


   Note the following:
   - If more than one supporting document is available, when you reach the last page on the current document and you continue to click the right arrow, the next document automatically opens. If you are using a mobile device, keep swiping to open the next document.
   - Once you reach the last page of a single document, or the last page of a series of documents, the right arrow is disabled.

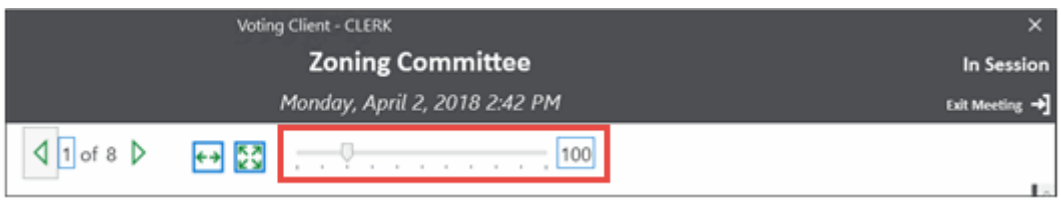
- Use the magnification options to view the document. Magnifications options include:
  - **Fit Page to Window Width**. This option fits the document page to the width of the screen.



  - **Fit Full Page to Window**. This option fits one full document page to the window.



  - **Zoom Slider**. Use the slider to zoom in and out of the document page.



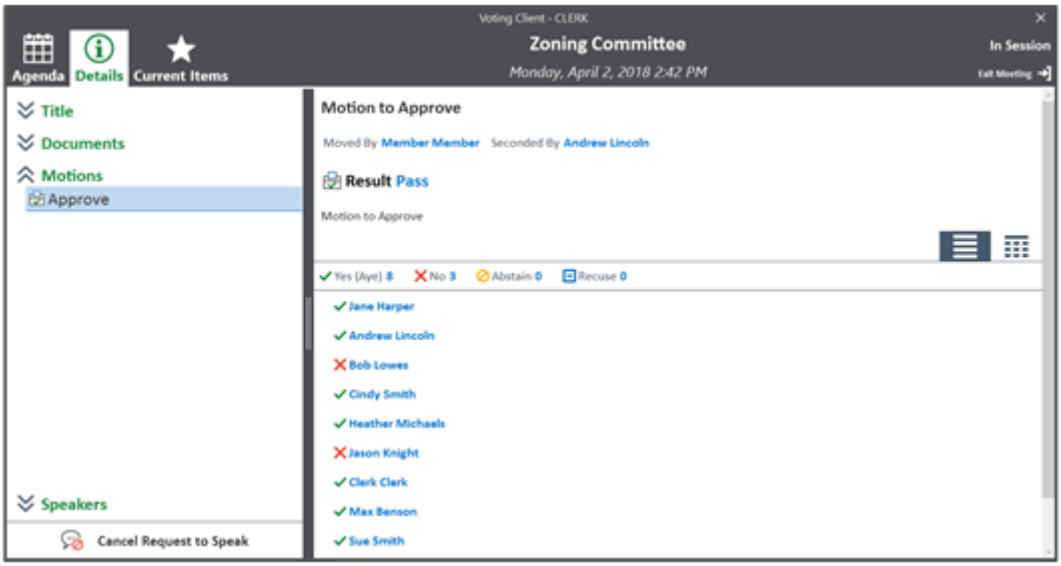
© 2021 Hyland Software, Inc. and its affiliates

Motions

If motions have been recorded for an item in OnBase Minutes, you can view both the motion and the result of that motion in the Voting Client.

To view a motion:

1. Click the result to see the full details, including who moved and seconded the motion, the result of the vote, and how each individual member voted.



© 2021 Hyland Software, Inc. and its affiliates

2. There are two options available for viewing the voting results:
   - **List option**. This option lists each member along with how they voted.

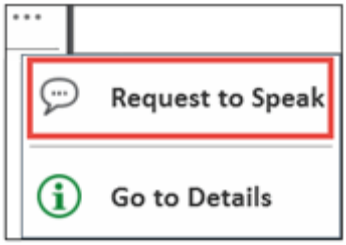
   - **Grid option**. This option displays the results in a grid by Vote choice (Yes, No, Abstain, Recuse).

Speakers

Speakers who can speak on sections and items can come from the public or from meeting members. Public speakers are assigned to agenda sections and items through OnBase Minutes (see the **OnBase Minutes** module reference guide for more information). Member speakers can request to speak on an item from the **Agenda** tab in the Voting client.

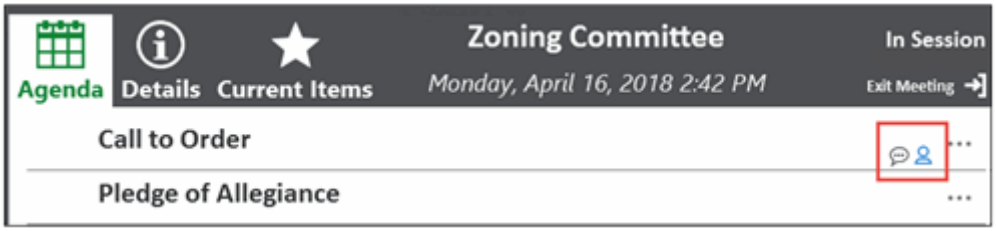
© 2021 Hyland Software, Inc. and its affiliates

Meeting members can request to speak on a section or item by clicking the ellipsis icon, and then selecting **Request to Speak** from the pop-up menu.



Note: The **Request to Speak** option is not active until the meeting manager has started the meeting.

You can determine if speakers have requested to speak on items by viewing the icons on the Agenda tab.



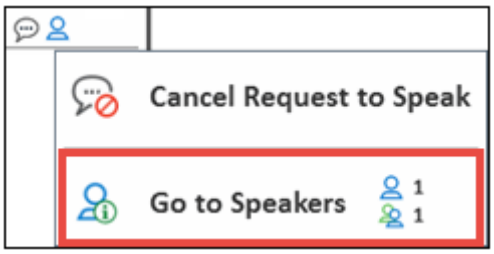
The icons indicate the following:

Icon	Description
	This icon indicates that a meeting member has requested to speak, and is in the queue for this item.
	This icon indicates that there are one or more public or member speakers waiting to speak on an item.

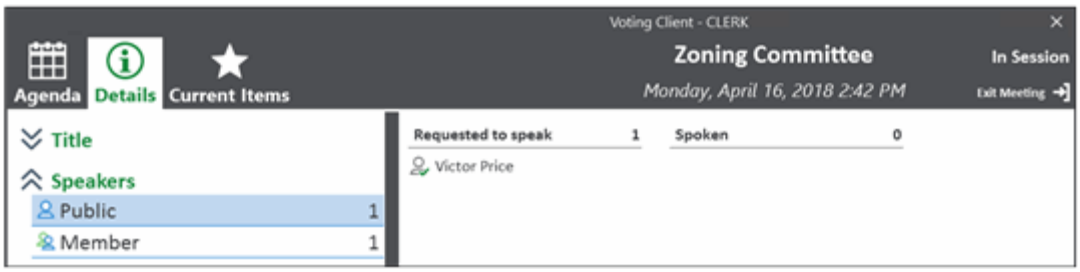
© 2021 Hyland Software, Inc. and its affiliates

To view the speakers on the Details tab:

1. Click one of the available speaker icons, and select **Go to Speakers** from the pop-up menu.



The Speakers are displayed on the **Details** tab. The number next to each icon indicates the number of Public and Members speakers who want to speak on the section or item.



Speaker icons indicate the following:

Icon	Description
	Public Speaker icon
	Member Speaker icon

2. Select either the **Public** option or the **Member** option to view the speakers that have requested to speak on the agenda item. If there are no speakers for one of the options (Public or Member), a 0 is displayed.

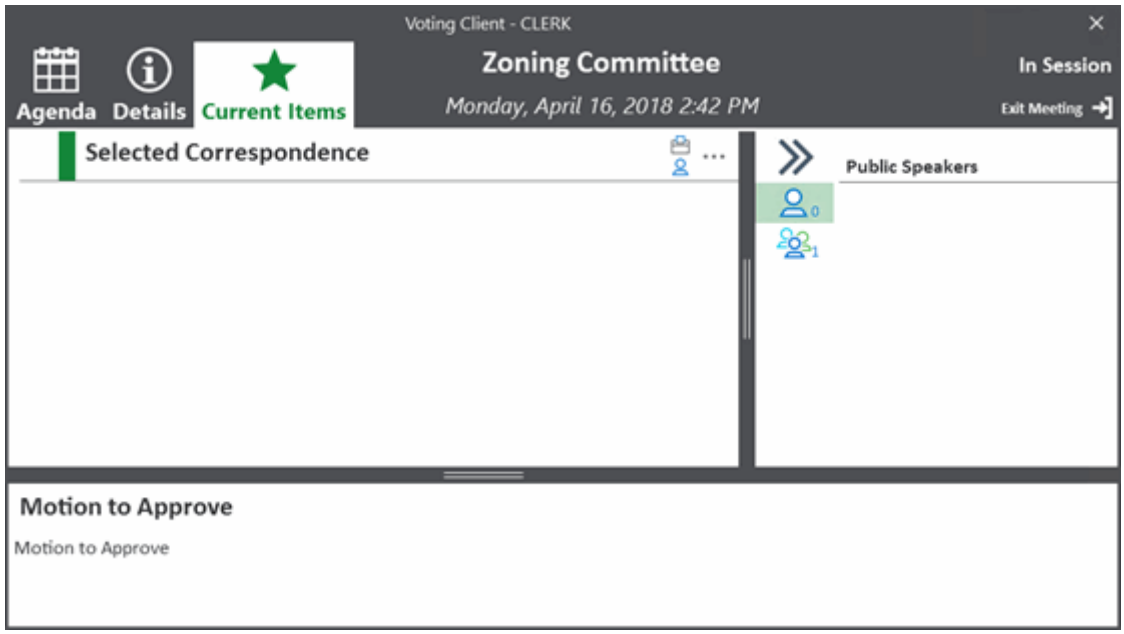
Note: Members can also cancel their request to speak by selecting the **Cancel Request to Speak** option from either the pop-up menu, or from the **Details** tab.

3. When a Public speaker has spoken, their name is moved to the **Spoken** column on the **Details** screen.

© 2021 Hyland Software, Inc. and its affiliates

Voting on Current Items

When a motion is created on an active item in OnBase Minutes, the motion is automatically displayed on the **Current Items** tab. When this motion has been opened for voting, the ability to vote on the item is also displayed on the **Current Items** tab. Depending on when the motion was opened, you may have the option to either move or second the motion.



Note: If multiple items are set as current in the meeting in Minutes, all of the current items are displayed in the **Current Items** tab.

© 2021 Hyland Software, Inc. and its affiliates

Moving or Seconding an Item

Each motion requires a mover, and may require a seconder. When the motion is opened in OnBase Minutes for moving and seconding, a button is displayed in the **Motion** section of the screen to either Move or Second the motion.

Note: The **Second** option is not available unless the motion has already been moved, and a seconder is required.

Note the following:

- Once the **Move** option has been selected, the option changes to **Withdraw Move**. If the motion has already been seconded, the **Withdraw Move** option does not display.
- Once the **Second** option has been selected, the **Withdraw Second** option is displayed allowing you to withdraw your second if needed.

When the motion has been closed in OnBase Minutes, the **Move** and **Second** options are removed from the screen.

© 2021 Hyland Software, Inc. and its affiliates

Voting on Items

When an item has been opened for voting in OnBase Minutes, the voting options are displayed on the **Current Items** tab.

Note: Depending on how the voting options are configured in Agenda, you may not see all of the available options. They may also be displayed in a random order. See the **Agenda** module reference guide for more information.

- If you are logged in as a **meeting member**, and the member role only has **Voting** rights, the vote options are displayed.

- If you are logged in as a meeting member, and the member role has **Voting** rights, **View Vote State** and **View Vote Choice** rights, the vote options are displayed, as well as the voting choices made by members in the meeting.

Note: The labels on the Voting buttons are configurable in Agenda. They may be named differently here depending on how your instance was configured.

© 2021 Hyland Software, Inc. and its affiliates

Select the option you want. Your choice is displayed above the voting options. You may change your vote as many times as necessary until the clerk closes the vote.

Note the following:

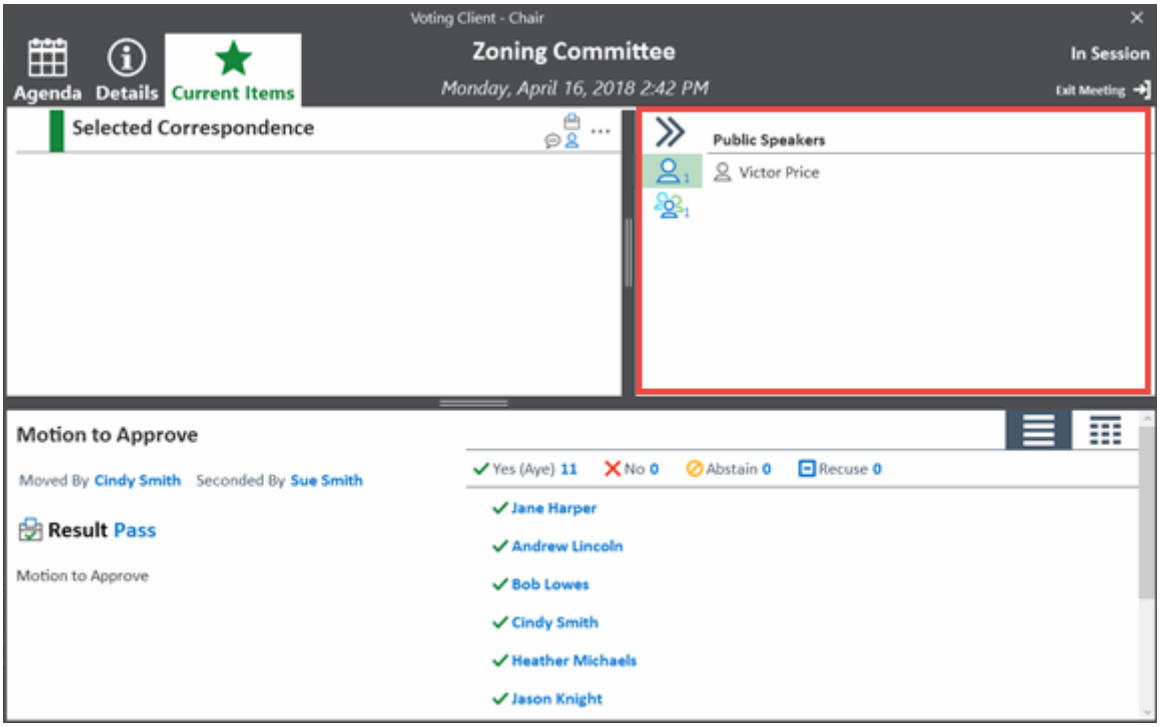
- When the vote is closed in OnBase Minutes, the voting options are no longer displayed on the screen.
- When the vote is marked as Pass or Fail in OnBase Minutes, the results are displayed in the **Current Items** tab.

Note: See Motions on page 40 for more information on viewing options.

© 2021 Hyland Software, Inc. and its affiliates

Viewing Speaker Information

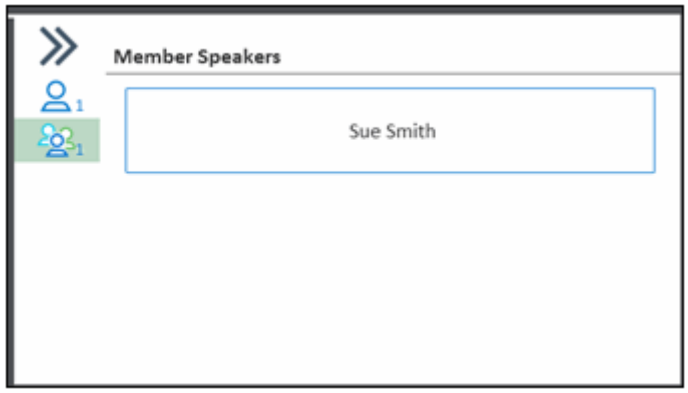
If Public or Member speakers have requested to speak on an agenda item, the speaker information is displayed on the **Current Items** tab.



Note: The arrows in the Speaker list act as a toggle. Select them to collapse and expand the speaker list.

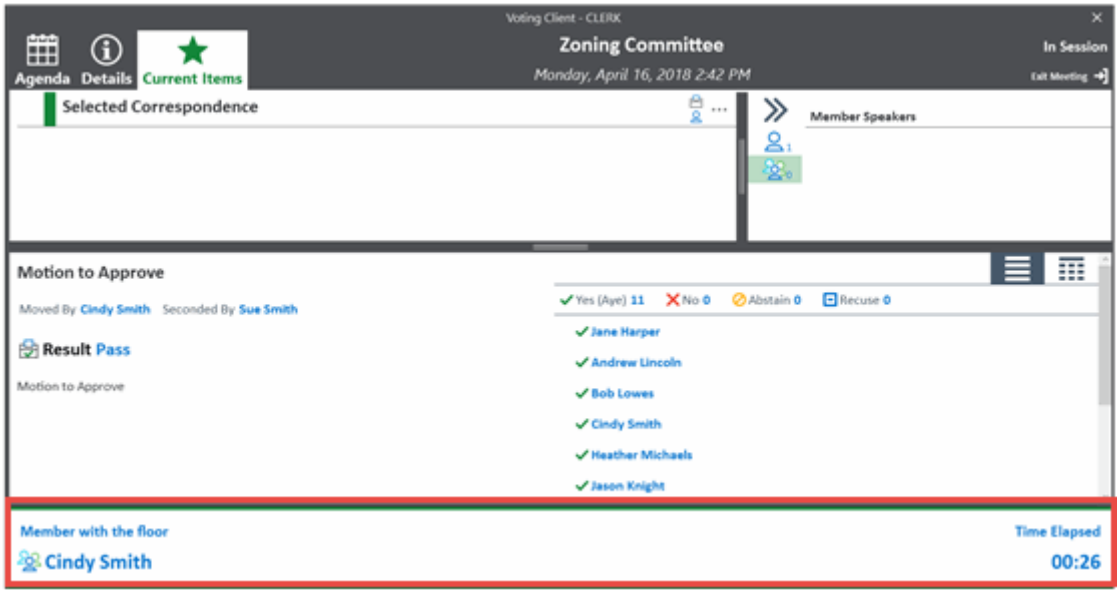
© 2021 Hyland Software, Inc. and its affiliates

If the user signed into the Voting Client has been assigned the **Recognize Member Speakers** role, they have the ability to allow only Member speakers to speak from the **Current Items** tab. To allow a Member speaker to speak, the user can select the name of the Member speaker from the **Speakers** section.



Note: All Public speakers are controlled solely from OnBase Minutes, whereas Member speakers can be controlled from OnBase Minutes or the Voting Client.

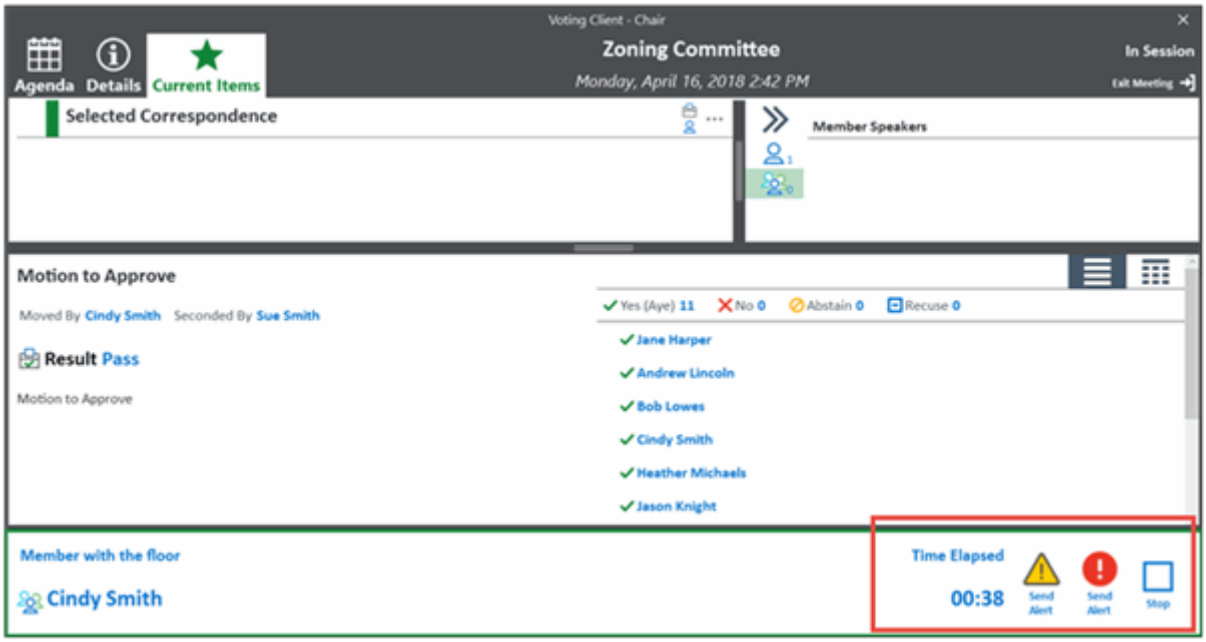
When a speaker has been allowed to speak on the item, the speaker information is displayed on the bottom of the screen.



© 2021 Hyland Software, Inc. and its affiliates

Speaker Controls

If you have been assigned the **Recognize Member Speakers** role in Agenda, a set of speaker controls is available when a member speaker is speaking. These controls are displayed next to the speaker name on the bottom of the screen.



The controls include the following:

Control	Description
Send Yellow Alert	Click to flash an alert on the bottom of the screen of the member that is speaking. **Note:** The significance of this alert is determined prior to the start of the meeting. Typically this alert is used to indicate that the speaker has a specific amount of time left to speak. When this alert is selected, the icon is modified, allowing the member controlling the alert to cancel it.

© 2021 Hyland Software, Inc. and its affiliates

Control	Description
Send Red Alert	Click to flash an alert on the bottom of the screen of the member that is speaking. **Note:** The significance of the alert is determined prior to the start of the meeting. Typically this alert is used to indicate that the speaker is out of time. When this alert is selected, the icon is modified, allowing the member controlling the alert to cancel it.
Stop	Click to stop the speaker from speaking. When you click this button, the speaker information is removed from the bottom of the screen.

Voting Display

The Voting Display provides the opportunity for the public to view the meeting information during a live meeting. They can view current agenda items, motions made on the items, which members moved or seconded the motion, the results of the member vote, and speaker information.

Logging in to the Voting Display

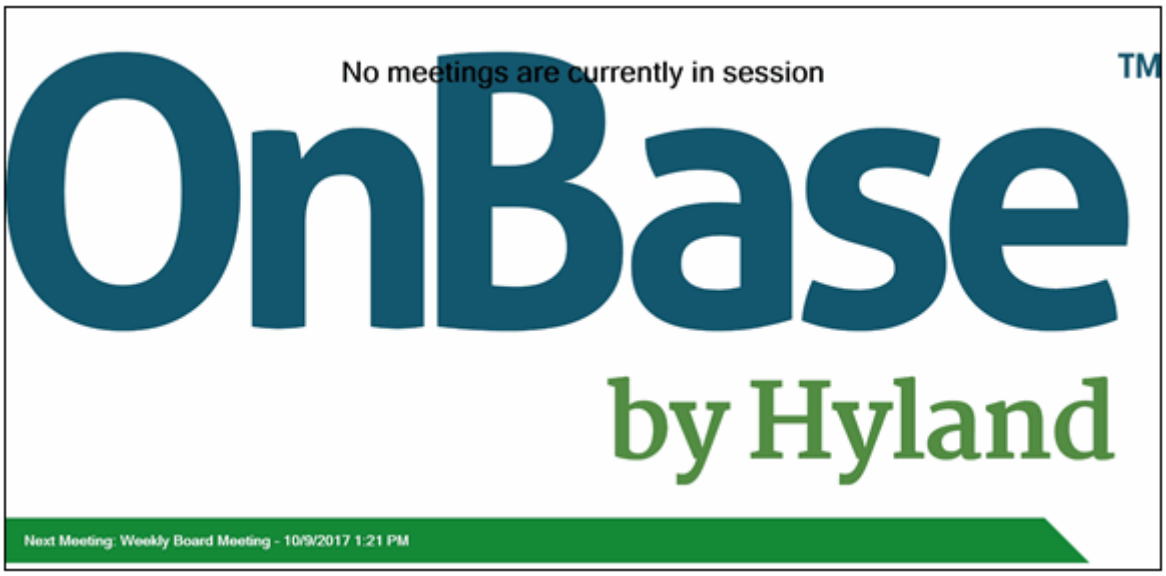
The login option displays only if the username and password information in the configuration file is not encrypted. When this information is encrypted, the Voting Display automatically logs the user in and the Voting Display screen displays automatically.

© 2021 Hyland Software, Inc. and its affiliates

To log in to the voting display:

1. Double-click the Voting Display icon. The Login dialog box is displayed.
2. Type your user name and password in the appropriate fields, and then click **Login**. The **Voting Display** screen is displayed.

Note: You must log in with a user that has not been used to log in to OnBase Minutes or the Voting Client.



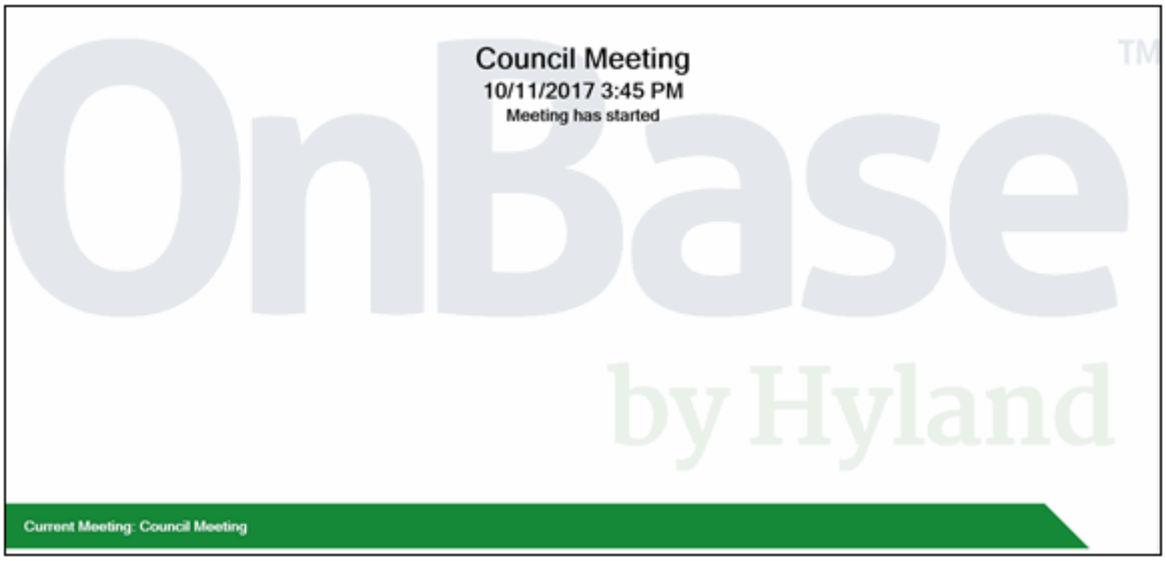
Note: The Voting Display client always opens in full screen mode. In order to exit the client, you must press the Esc key.

One of the following is displayed:

- If no meetings are currently in session, this verbiage is displayed on the main screen. The next meeting information is displayed in the green bar on the bottom of the screen.
- If a meeting is already in session, the Voting Display opens to the point in the meeting that is currently active.
- In the green information bar at the bottom of the screen, either the current meeting information is displayed, or information for the next meeting is displayed.

© 2021 Hyland Software, Inc. and its affiliates

When a meeting has started, the meeting information is displayed on the screen.



Viewing Meeting Information

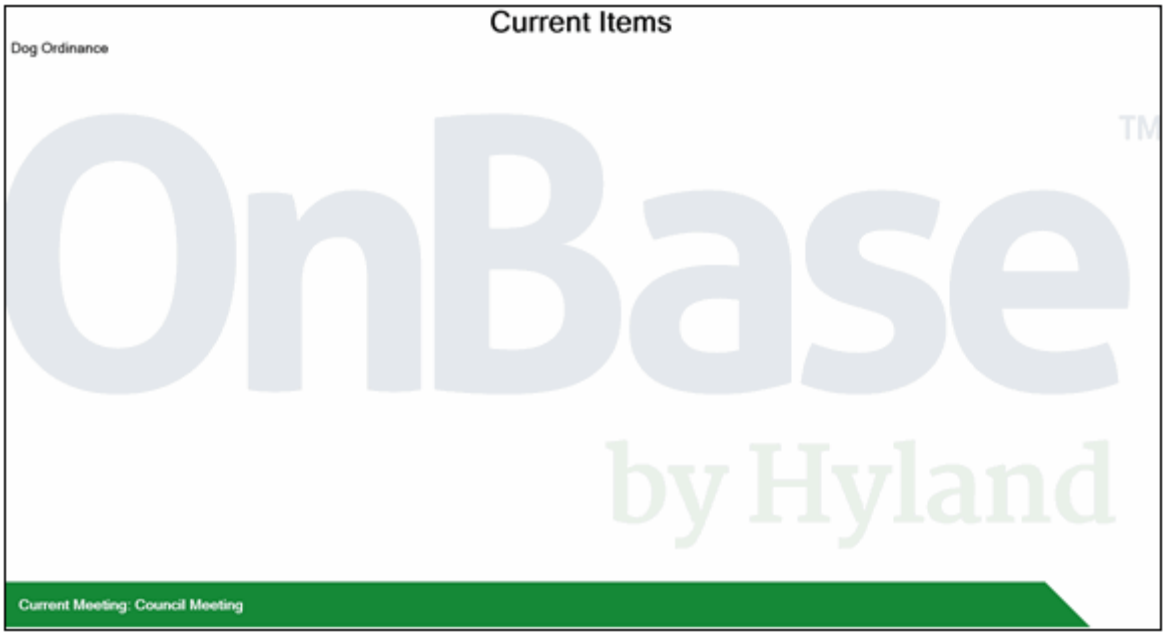
When a meeting is started, information is displayed on the Voting Display screen as the meeting progresses.

- Current Items
- Motion Presented
- Motion Mover and Seconder
- Vote Results
- Speaker Information

© 2021 Hyland Software, Inc. and its affiliates

Current Items

When items are set as Current in OnBase Minutes, the **Current Items** screen displays each item, along with any item text. If the item text is too long, the text scrolls on the screen. The scroll speed is configurable. See Voting Display Configurations on page 25 for more information.

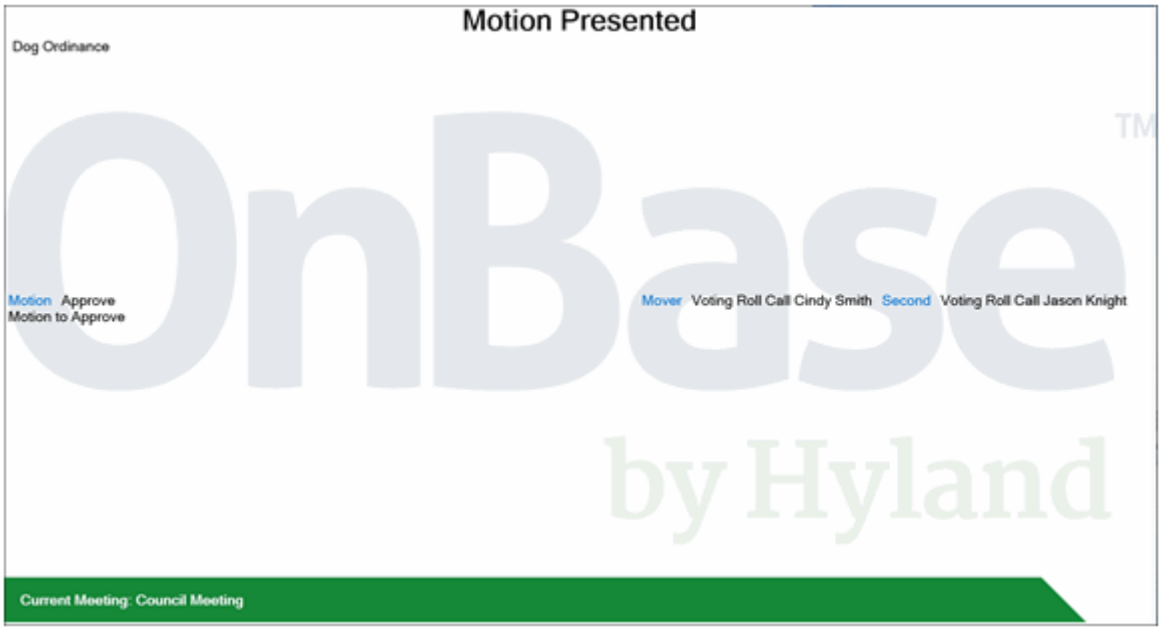


© 2021 Hyland Software, Inc. and its affiliates

Motion Presented

When a motion has been presented in OnBase Minutes, the motion is displayed in the Voting Display on the Motion Presented screen, along with any Motion text. If the motion text is too long, the text scrolls on the screen. The scroll speed is configurable. See Voting Display Configurations on page 25 for more information.

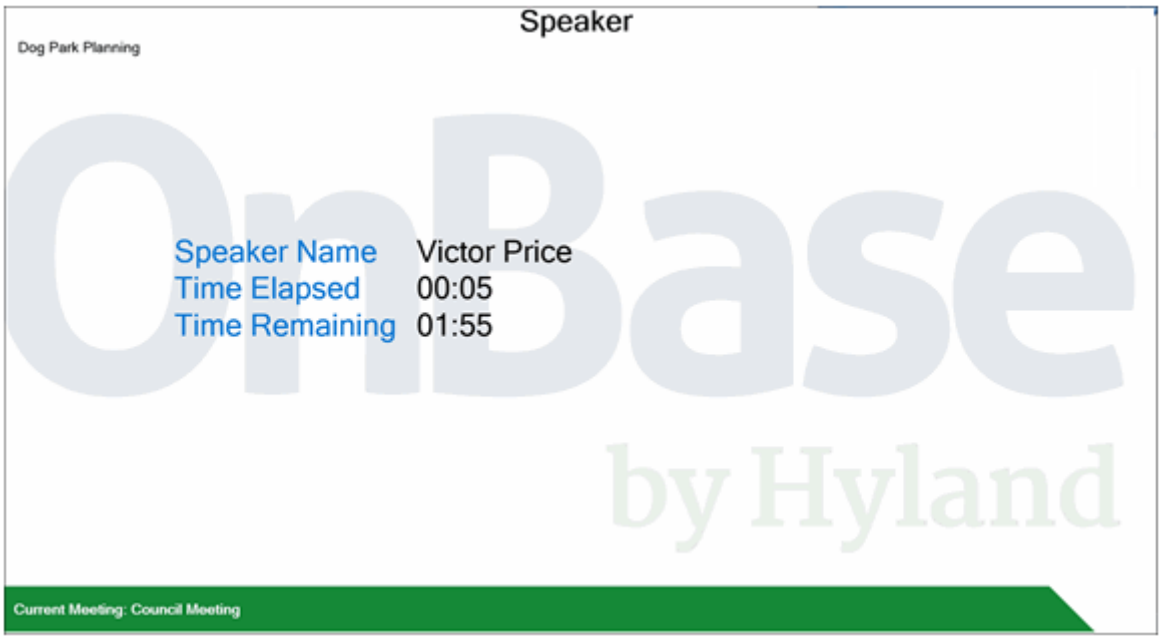
When a motion has been moved and seconded, the results are displayed on the screen.



© 2021 Hyland Software, Inc. and its affiliates

Speaker Information

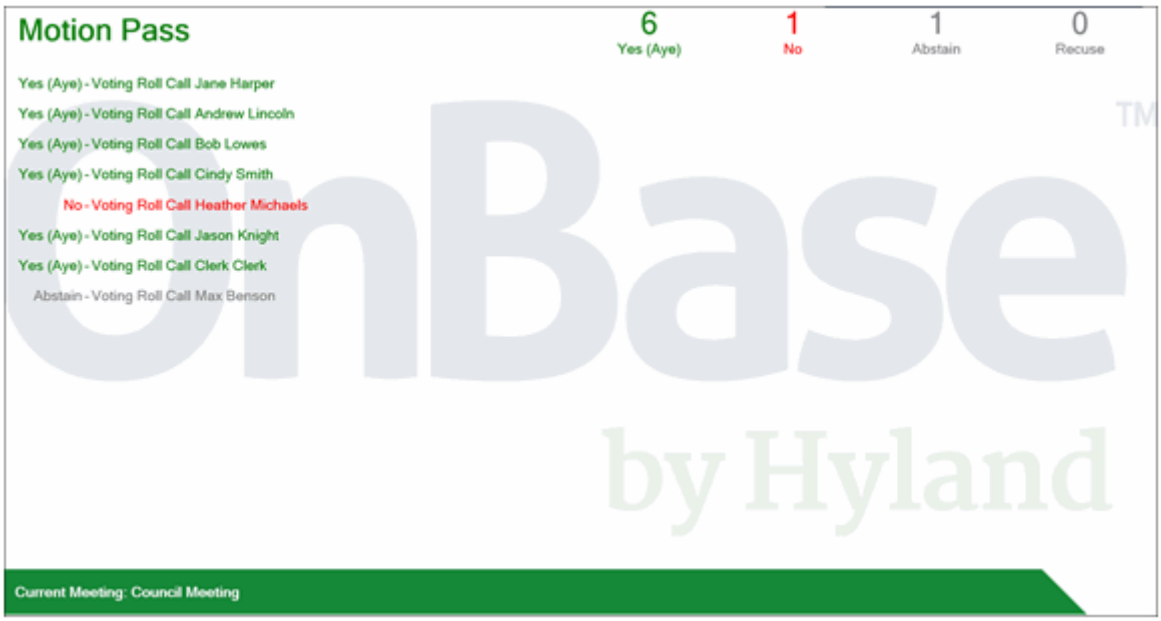
When a **public** speaker has been allowed to speak on an item, the speaker information is displayed on the Voting Display screen.



© 2021 Hyland Software, Inc. and its affiliates

Motion Results

When a motion has been voted on, and the vote has been finalized, the results display on the Voting Display screen. If there are several meeting members, the text scrolls on the screen. The scroll speed is configurable. See Voting Display Configurations on page 25 for more information.



© 2021 Hyland Software, Inc. and its affiliates