



Aptify Convention Reports

For Locals, Districts, and Sectors

July, 2021

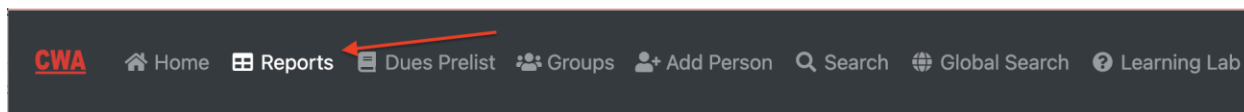
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Convention Report Basics

The convention reports can be found in Aptify. To access them first log in to you aptify account <https://portal-cwa.aptify.com/login.aspx>

Navigate to the **Reports** page



Scroll down to the section titled **Convention Reports** on the Reports page

Convention Reports

Delinquent PUs	Delinquent PUs - lists those Local/PU's that did not meet the delinquency period information required.
Local-PU Vote Strength	Local-PU Vote Strength - lists locals PU's w/ 12 month average, displaying Bargaining unit
Report By BU W/Grouping	Report By BU W/Grouping - this displays the bargaining unit bucket grouping assigned by HQ.
12 Month Vote Count By PU & Date	12 Month Vote Count By PU & Date
Voting Strength Delegate Entitlement	Voting Strength Delegate Entitlement

Once selected, each convention report (except for Voting Strength Delegate entitlement) will have a dropdown menu titled "Meeting Wizard Selection", use this to select the convention or special meeting relevant to the report and then click on the RUN button. This dropdown will default to the most current convention/meeting at the time that you access the report, and will only show the most current run of meetings available to locals. For this guide we will be selecting **2021 - Convention - New Orleans**

Meeting Wizard Selection

Run

2021 - Convention - New Orleans - 31
2021 - Convention - New Orleans - 31
UDIG Testing Data - 2019 Convention - 25

District/Sector users

If you are logged in as a District or Sector when reviewing these reports, when you want to restrict reports to a particular local you will need to select that local from the drop down filter at the top of the page and looking for a specific Local, you will need to use the filter to restrict the results to just that particular Local.

Select a Local Then click on the button to be able to see their data.

0 - Select Local

Select Local

Note: The Local # and PU # are currently stored as a text string in this report, so there may be anomalies to the numerical Local # or PU # ordering when sorting on those columns. You will need to export the report and convert the column to a numeric field format in Excel if you are trying to report on a large number of Locals or PUs.

Convention Report Details

Delinquent PUs

This report contains the Delinquent Locals/PU's at the time of the report. Delinquency is based on submission of the dues reports, files, and/or payments.

This report will default with the most current meeting, but Locals can change their option to review prior meeting history as well (when applicable). Be sure to click RUN to execute the report to display the details after selecting a meeting from the "Meeting Wizard Selection" dropdown list.

Delinquent PUs

For a listing of your locals delinquent, select the meeting in the drop down and select run.

Meeting Wizard Selection

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Run

Export to Excel Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize Columns

ID :	Local PU Name :	Delinquer Dues Period :	Override Delinquer Formatted :	Override Type :	PU Error Code :	Dues Processin Method :	Bargainin Unit Name :	PU Deactivati Date :	Conventic Name :	Voting Strength Wizard ID :	Local Number :	Processin Unit Number :	Conventic Delinquer :	Delinquer Reason :	Sector :	Bargainin Unit :	District Name :	Count Average :
159114		May 2021	No		No Error	Traditiona Top-Down	Public - Janus		2021 - Conventic - New Orleans	31			Delinquer	Open Calendar,	Traditiona CWA	34	District 1	7
159115		May 2021	No		No Error	Traditiona Top-Down	Public - Janus		2021 - Conventic - New Orleans	31			Delinquer	Open Calendar,	Traditiona CWA	34	District 1	0

Delinquency status is calculated based on the meeting selected, you can determine what the delinquency month used is by reviewing the "Delinquency Dues Period" column.

The **Delinquency Reason** column will indicate a number of reasons a PU is delinquent. It could be that the calendars have not been submitted or invoiced yet for the month (**Open Calendar**) or still have unpaid invoices (**Open Balance**) for the Local that are within the convention period. If you see this, you should review/pay your open invoices. Please keep in mind there will be some time delay between paying an invoice and that submission being reflected in the report. This report will be updated periodically, but not daily.

Override Delinquency Formatted :	Override Type :
Yes	Legal Action - Waived

If you see a unit marked as Delinquent and also has a “Yes” value in the **Override Delinquency Formatted** column, someone at HQ (through the S/T office) has been in contact with the local regarding this delinquency showing and the PU has been manually overridden for the delinquency status. The **Override Type** column will contain the reason for the override. *Note: these PUs will remain in this report until HQ has received the agreed upon items to systematically remove them.*

Local-PU Vote Strength

This report displays the Locals 12 month average by PU for the convention period. The sum of all the Locals PU’s 12 month average will give the overall Locals voting strength.

When this report is run by a local it will include the sum of the overall average for the local at the bottom. This report will also display if the Local/PU is classified to be delinquent or not. You should refer to the Delinquency report for further details on that.

ID :	District Number :	Local Number :	Processing Unit Number :	Processing Unit Name :	Count Average :	PU Deactivation Date :	Proxy Eligible Formatted :	Bargaining Unit :	Bargaining Unit Name :	Convention Delinquency :	Override Delinquency Formatted :	Override Type :	Sector :	PU Error Code :	Voting Strength Wizard ID :
159409					2		No	90	Other	Not Delinquent	No		Traditional CWA	No Error	31
159410					7		No	25	ATT-Avaya	Not Delinquent	No		Traditional CWA	No Error	31
Sum : 46					Sum : 5706			Sum : 2223							

The **Proxy Eligible Formatted** field indicates whether a Local is eligible to proxy.

This report will also indicate how HQ has the bargaining unit designation set up. These will carry over into the Convention Registration system (CMS) for delegation assignment.

Report by BU W/Grouping

This report is similar to the Local Vote Strength but includes the option to filter to a specific Bargaining Unit (BU) grouping that has been setup using the BU Grouping Exactly Matches dropdown selector.

BU Grouping Exactly Matches

Run

Export to Excel Refresh Clear Sorting Clear Filters Clear Grouping

RBOC

RBOC

ATT

LUCENT

TELECOM

AVAYA

Note: This selector will show all BU grouping selection options regardless of whether it is relevant to the current Local/District/Sector viewing this report. If you select a BU Grouping which does not exist in your Local/District/Sector the report will be blank.

Report By BU W/Grouping

Meeting Wizard Selection

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BU Grouping Exactly Matches

RBOC

Run

Export to Excel Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize Columns

ID :	District Number :	Local Number :	Processing Unit Number :	Processing Unit Name :	Count Average :	Bargaining Unit Bucket :	Bargaining Unit Name :	Bargaining Unit :	Dues Import Error Code Name :	PU Deactivation Date :	Convention Delinquency :	Override Delinquency :	Delinquency Reason :	Dues Processing Method :	Voting Strength Wizard ID :
160885	4				225	RBOC	RBOC-AT&T/SBC//	11	No Error		Not Delinquent	<input type="checkbox"/>		Traditional Top-Down	31

This report displays the Local/PU 12 month count average with a sum of the overall Locals voting strength. This report will also indicate how HQ has the bargaining unit designation set up. These will carry over into the Convention Registration system (CMS) for delegation assignment.

When this report is run by a local it will include the sum of the overall average for the local for that Bargaining unit at the bottom of the report. This report will also display if the Local/PU is classified to be delinquent or not. You should refer to the Delinquency report for further details on that.

12 Month Vote Count by PU & Date

This report gives the breakdown of the Locals **monthly paid member counts** for that particular Local/PU/dues period. These are the figures used to compute the Locals PU voting average that appear on the Local Dues Summary reports.

This report lists the 12 months as numbers 1-12. The 12 month averaging period is the start to the end date. For example, the 12 month averaging period for the 2021 Convention is June 2020 – May 2021. This is how the periods would align with the dues month:

1	2	3	4	5	6	7	8	9	10	11	12
Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21

The counts in this report determine how the 12 month average is determined and will tie back to the [Local-PU Vote Strength](#) report. A sum is displayed at the bottom of this report for the overall Local.

There may be some columns where you see 0 as the counter. If so, some reasons why that could be are: that the dues have not been processed yet but are in house, we have not received the dues for processing yet, month could have been a No work/No pay (NW/NP), etc. Please give this some time once initial votes are released to get processed before asking on updated counts.

12 Month Vote Count By PU & Date

This report uses 1-12 to dictate the months involved using the Convention Period's Start-End dates.

Meeting Wizard Selection

2021 - Convention - New Orleans - 31

Run

ID :	Local Number :	Processing Unit Number :	Start Date :	End Date :	1 :	2 :	3 :	4 :	5 :	6 :	7 :	8 :	9 :	10 :	11 :	12 :	Total Votes :	Avg :	Voting Strength Wizard ID :
161410			06/01/20	05/01/20	3	3	3	3	3	2	2	2	2	2	2	2	29	2	31
161411			06/01/20	05/01/20	7	7	7	7	7	7	7	7	7	7	7	7	84	7	31

Note: Within the values shown on this report, there could be Local mergers counts that were allocated to the merged local. Or there could be manual adjustments that were given for a number of reasons (dues in house not processed, error when dues were processed, etc).

Generally when manual adjustments are given the Local has been in contact with someone at HQ via cwacredentials@cwa-union.org.

Voting Strength Delegate Entitlement

This report is a view to show the number of delegates a Local is entitled to based on the overall Locals 12 month average votes. These are set by the CWA Constitution,(Article VIII – Conventions, Section 4(d)).

Voting Strength Delegate Entitlement

This report shows the voting strength delegate entitlement.

Export to Excel
Refresh
Clear Sorting
Clear Filters
Clear Grouping
Auto Resize Columns

ID :	Name :	Min Number Of Votes :	Max Number Of Votes :	Number Of Delegates :	Proxy Eligible :
1	0 - 199 Delegates: 1	0	199	1	<input checked="" type="checkbox"/>
2	200 - 399 Delegates: 2	200	399	2	<input type="checkbox"/>
3	400 - 800 Delegates: 3	400	800	3	<input type="checkbox"/>

Any questions related to your locals convention voting strength or delinquency should be sent to CWACredentials@cwa-union.org.