



Aptify Convention Reports Guide

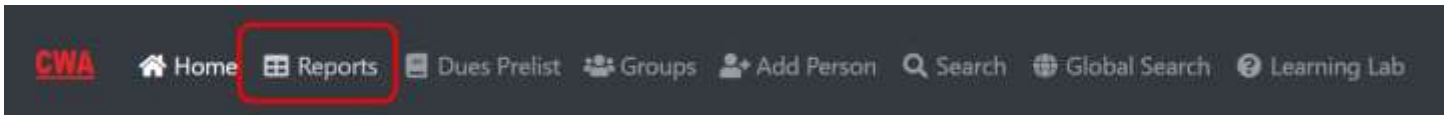
February 2023

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Convention Report Basics

The Convention Reports can be found in Aptify under the **Reports** application. To access these reports, login to Aptify with your username and password <https://portal-cwa.aptify.com/Login.aspx>. Navigate to the Reports application at the top of your screen.

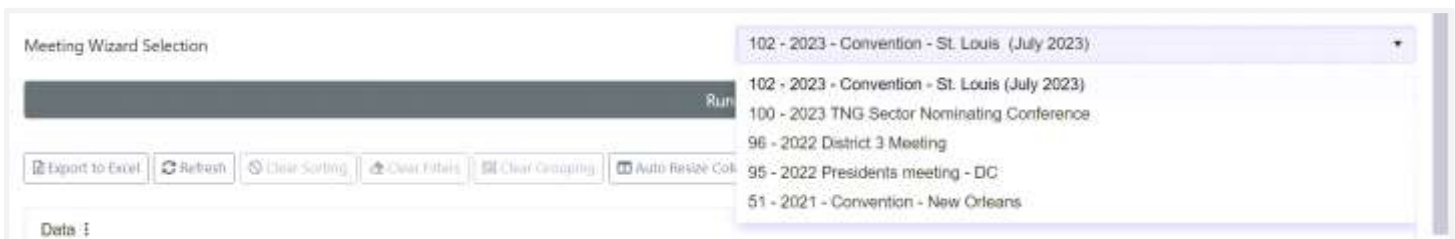


Scroll down to the section titled **Convention Reports** on the Reports page.

Convention Reports

Local Summary	Local Summary
Voting Strength Delegate Entitlement	Voting Strength Delegate Entitlement
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 with Grouping	Report By BU with 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

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. The dropdown menu 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.



District/Sector Users

If you are logged in as a District or Sector when reviewing these reports, to restrict reports to a particular local, select that local from the drop down filter at the top of the page. This will 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 to 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 51 - 2021 - Convention - New Orleans

Run

[Export to Excel](#) [Refresh](#) [Clear Sorting](#) [Clear Filters](#) [Clear Grouping](#) [Auto Resize Columns](#)

ID ⋮	Distri Num ⋮	Loca Num ⋮	Proc Unit Num ⋮	Loca PU Nam ⋮	Cour Aver ⋮	Last Dues Proc ⋮	Delin Dues Peric ⋮	Conv Delin ⋮	Delin Reas ⋮	Over Delir Form ⋮	Over Type ⋮	PU Error Code ⋮	Dues Proc Meth ⋮	Sectr ⋮	Barg Unit ⋮	Barg Unit Nam ⋮	PU Deac Date ⋮	Conv Nam ⋮	Votin Strer Wiza ID ⋮
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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.

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.

Delinquency :	Delinquency Reason :	Override Delinquency Formatted :	Override Type :	PU Error Code
	Open Calendar,	Yes	Payment in house, awaiting Files/reports	No Error
	Open Calendar,	Yes	Payment in house, awaiting Files/reports	No Error
	Open Calendar,	Yes	Payment in house, awaiting Files/reports	No Error
	Open Calendar,	Yes	Payment in house, awaiting Files/reports	No Error
	Open Calendar,	Yes	Payment in house, awaiting Files/reports	No Error
	Open Calendar,	Yes	Payment Plan	No Error
	Open Calendar,	Yes	Payment Plan	No Error
	Open Calendar,	Yes	Files & Payments in house	No Error

Notes:

- These PUs will remain in this report until HQ has received the agreed upon items to systematically remove them.
- Please be advised that once a meeting has completed, the information is not updated and will stay in the report as the last update.

This report lists the 12 months as numbers 1-12. The 12 month averaging period is the start to the end date(shown on the report). 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 (refer to the AVG column).

There may be some columns where you see 0 as the counter. If so, some reasons why that could be are:

- The dues have not been processed yet but are in house.
- We have not received the dues for processing yet.
- The 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 51 - 2021 - Convention - New Orleans

Run

[Export to Excel](#) [Refresh](#) [Clear Sorting](#) [Clear Filters](#) [Clear Grouping](#) [Auto Resize Columns](#)

ID	Local Number	Proces Unit Number	Start Date	End Date	1	2	3	4	5	6	7	8	9	10	11	12	Total Votes	Avg	Voting Streng Wizard ID	Proces Unit Name	Dues Proces Metho

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)).

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 - 599 Delegates: 3	400	599	3	<input type="checkbox"/>
4	600 - 799 Delegates: 4	600	799	4	<input type="checkbox"/>
5	800 - 999 Delegates: 5	800	999	5	<input type="checkbox"/>
6	1000 - 1199 Delegates: 6	1000	1199	6	<input type="checkbox"/>
7	1200 - 1399 Delegates: 7	1200	1399	7	<input type="checkbox"/>
8	1400 - 1599 Delegates: 8	1400	1599	8	<input type="checkbox"/>
9	1600 - 1799 Delegates: 9	1600	1799	9	<input type="checkbox"/>

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

Local Summary

[illegible]

This report displays the Locals average voting strength for the meeting selected. If you are a District/Sector pulling this report, you can pull all the locals in your district if you clear the individual local number selection.

Note: Once the meeting is over, these votes do not automatically update and remain shown on the screen.