



Aptify Convention Reports Guide

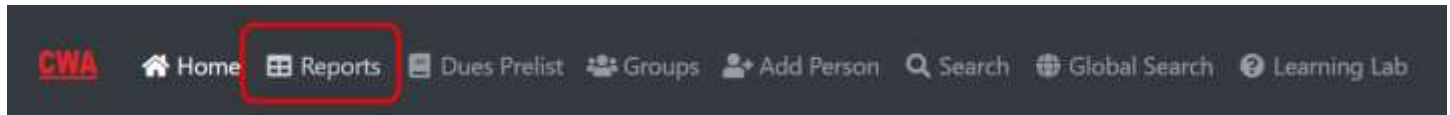
February 2023

Table of Contents

Convention Report Basics	3
District/Sector Users	4
Convention Report Details	5
Delinquent PUs	5
Local-PU Vote Strength	7
Report by BU W/Grouping	8
12 Month Vote Count by PU & Date	8
Voting Strength Delegate Entitlement	10
Local Summary	11

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.

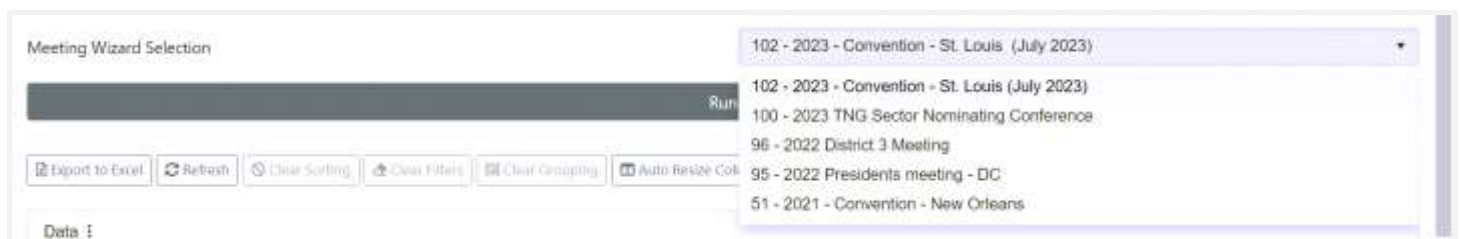


Scroll down to the section titled **Convention Reports** on the Reports page.

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

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.

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	☒
2	200 - 399 Delegates: 2	200	399	2	☐
3	400 - 599 Delegates: 3	400	599	3	☐
4	600 - 799 Delegates: 4	600	799	4	☐
5	800 - 999 Delegates: 5	800	999	5	☐
6	1000 - 1199 Delegates: 6	1000	1199	6	☐
7	1200 - 1399 Delegates: 7	1200	1399	7	☐
8	1400 - 1599 Delegates: 8	1400	1599	8	☐
9	1600 - 1799 Delegates: 9	1600	1799	9	☐

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.