

# USING AGM SCREENS

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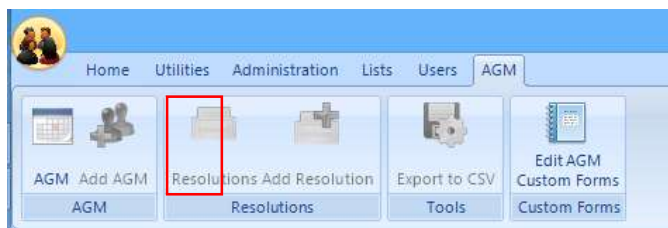
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# Summary

The AGM section in GDMA contains the facilities to maintain AGMs. The section contains screens to add an AGM, add a list of attendees to an AGM, create resolutions for an AGM and keep track of its voting list. It also has the facility to create and print custom forms to be used in attendee labels and voting forms.

## Adding an AGM

Go to the AGM menu and click the AGM icon.



Once the AGM main screen appears, click the Add AGM icon

Enter the details for the AGM. Click the **Add** button once finished. See figure 1 for a sample.

Select the **Trust** of the AGM from the dropdown list

Set the **Date** of the AGM

Provide the **Description** for the AGM

Figure 1: Adding an AGM

	Trust	Date	Description
→		08-Mar-2014	1st General Assembly

**Figure 2: Added AGM**

## AGM's Attendee Label

The Attendee Label for an AGM can be set by selecting the attendee label form in the AGM List. It can be found by scrolling to the right-most part of the grid. More details on how to add and create an Attendee Label will be explained in later sections of this document.

ist	Date	Description	Attendee Label
→	08-Mar-2014	1st General Assembly	

**Figure 3. Set the Attendee Label**

# Adding Attendees to an AGM

Select an AGM in the list that you want to add shareholders to

Type the shareholder ID or name of the shareholder you want to add, then press the Enter key.

If there are multiple matching shareholders for a given name, a window will appear so you can select the shareholder. You can also select multiple shareholders from the window by holding down the CTRL key while selecting the shareholders. Just click the Select button to add the shareholder(s) to the list.

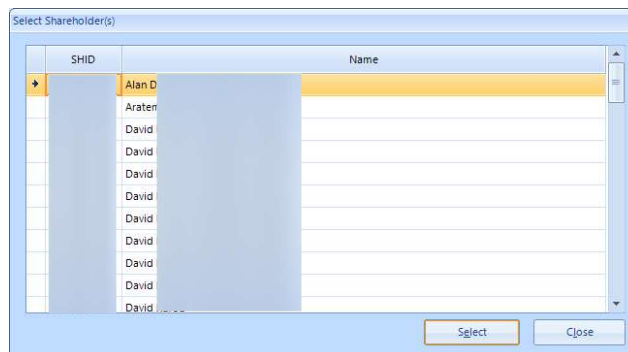


Figure 4. Select Shareholders to add to the AGM

The selected shareholders will be shown in the list.

**Voting Form** – clicking this button will display the Voting Form selection screen for that shareholder and selected AGM.

**Attendee Label** – clicking this button will display the Attendee Label of the shareholder.

**SHID** – the Shareholder ID

**Name** – the name of the shareholder

**Address** – the address of the shareholder

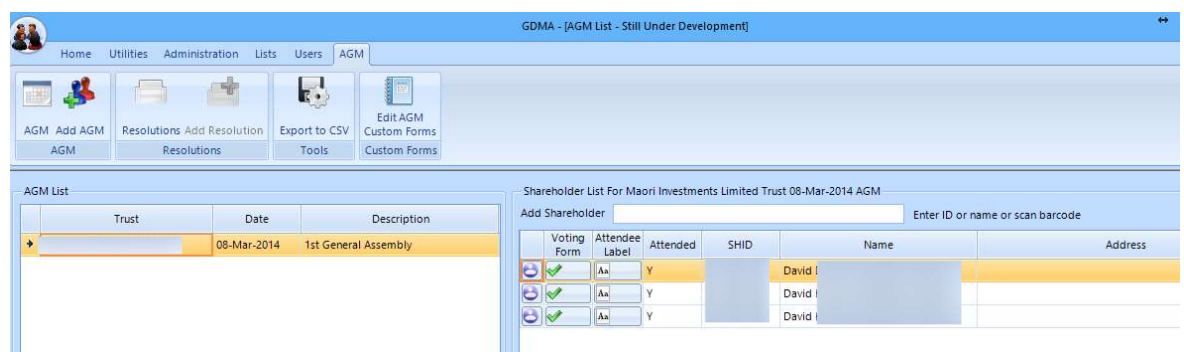


Figure 5. An AGM with shareholders added to it

# Shareholder Details

The details of an attendee can be viewed by double-clicking the row in the list.

**Picture** – right-click on the picture to select the image of the shareholder.

**Attended** – a checkbox to indicate that the shareholder attended the AGM.

**Trustee** – this contains a dropdown list of the shareholder's alias. This is primarily used to signify the person that attended the AGM is the shareholder record is for a Whanau Trust, for example.

**Proxy** – used to enter the name of the person that attended the AGM if the shareholder sent a proxy.

**Name display** – choose the name source that you want to be displayed in the voting list. Options are Shareholder Name, Proxy and Trustee. Figure 7 shows an example.

**Attendee Label** - clicking this button will display the Attendee Label of the shareholder.

**Voting Form** - clicking this button will display the Voting Form selection screen for that shareholder and selected AGM.

**Remove From AGM** – clicking this button will remove the shareholder from the list.

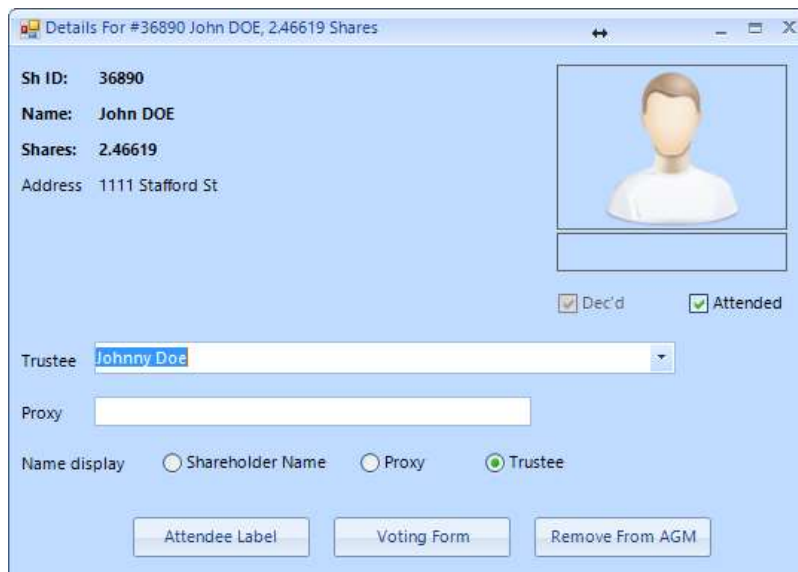


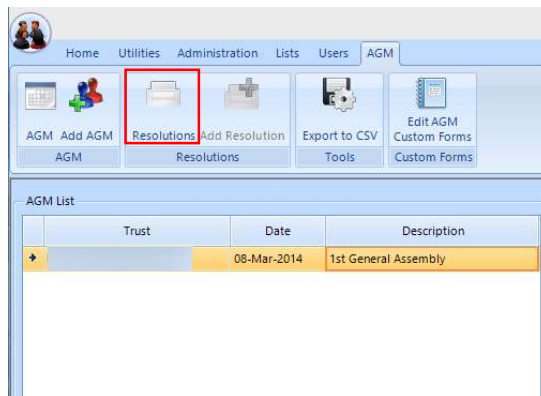
Figure 6. Shareholder Details

Voting List For ARAKARI TRUST Trust 11-Oct-2013 AGM - New Chairperson								
Search Shareholder			Enter ID or name or scan barcode					
	For	Against	SHID	Name	Trustee - Proxy	Shares	Votes	Total
→	<input checked="" type="checkbox"/>	<input type="checkbox"/>	36890	Johnny Doe	Johnny Doe	2,46619	1	2,46619

**Figure 7. Voting List – Shows Trustee as the Name Display**

## Adding a Resolution

Select the AGM you want a resolution to be created on. Click the Resolutions icon in the Resolutions ribbon group.



**Figure 8. Resolutions icon**

Click the Add Resolution icon when the Resolutions screen is opened.



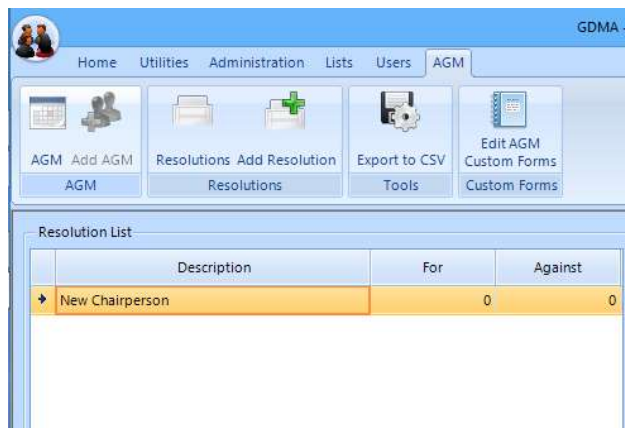
**Figure 9. Resolutions screen**

Enter the **Description** for the resolution. Click the **Add** button to create the resolution.



A small dialog box titled "Add Resolution". It has a text input field labeled "Description" containing the text "New Chairperson". Below the input field are two buttons: "Add" and "Cancel".

Figure 10. Add Resolution screen



A screenshot of a web application interface. At the top is a navigation bar with tabs: Home, Utilities, Administration, Lists, Users, and AGM. Below the tabs are several icons with labels: "AGM Add AGM", "Resolutions Add Resolution", "Export to CSV", and "Edit AGM Custom Forms". The main area is titled "Resolution List" and contains a table with the following data:

Description	For	Against
New Chairperson	0	0

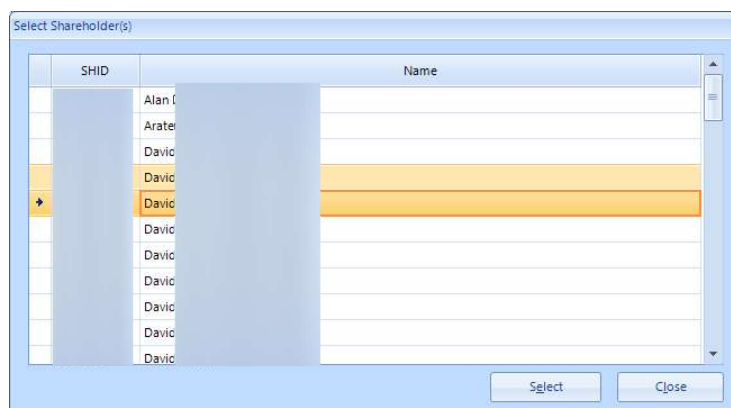
Figure 11. Resolution List

## Adding Votes to a Resolution

Select a resolution in the list that you want to add votes to

Type the shareholder ID or name of the shareholder you want to add and then press the Enter key.

If there are multiple matching shareholders for a given name, a window will appear so you can select the shareholder. You can also select multiple shareholders from the window by holding down the CTRL key while selecting the shareholders. Just click the Select button to add the shareholder(s) to the list.



A dialog box titled "Select Shareholder(s)". It contains a table with two columns: "SHID" and "Name". The table lists several entries, with "David" appearing multiple times. One row is highlighted in orange. Below the table are two buttons: "Select" and "Close".

Figure 12. Select voters



The selected shareholders that are not yet in the shareholder list of the AGM will automatically be added to the list.

The screenshot shows the Arise Software AGM interface. The top navigation bar includes Home, Utilities, Administration, Lists, Users, and AGM. The AGM section is active, showing a sub-menu with AGM Add AGM, Resolutions Add Resolution, Export to CSV, and Edit AGM Custom Forms. The main area is divided into two panes. The left pane, titled 'Resolution List', shows a table with columns 'Description', 'For', and 'Against'. The right pane, titled 'Voting List For Maori Investments Limited Trust 08-Mar-2014 AGM - New Chairperson', shows a table with columns 'For', 'Against', 'SHID', 'Name', 'Trustee - Proxy', 'Shares', 'Votes', and 'Total'. The 'For' column in the right pane is highlighted in yellow.

For	Against	SHID	Name	Trustee - Proxy	Shares	Votes	Total
<input checked="" type="checkbox"/>	<input type="checkbox"/>		David		6	1	6
<input checked="" type="checkbox"/>	<input type="checkbox"/>		David		0	1	0

Figure 13. Voting List of a Resolution

The **For** and **Against** columns can be used to set the vote of a shareholder for the given resolution.

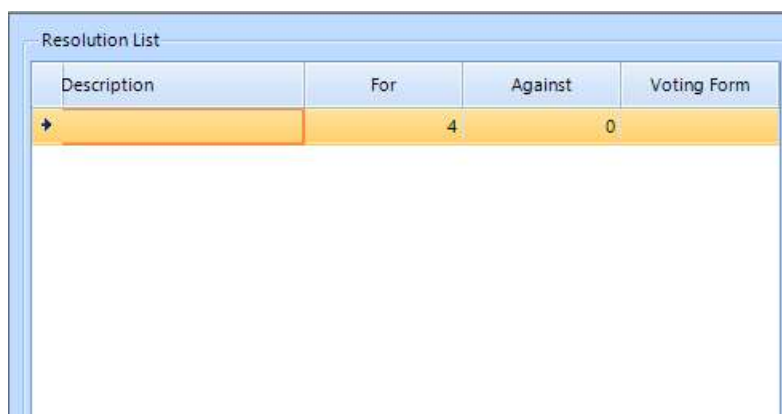
The **Vote** column is used to set the multiplier for the **Total** column as well as the voting unit value. Figure below shows that shareholder 163423 has a **Votes** value of **3**.

The screenshot shows the Arise Software AGM interface. The top navigation bar includes Home, Utilities, Administration, Lists, Users, and AGM. The AGM section is active, showing a sub-menu with AGM Add AGM, Resolutions Add Resolution, Export to CSV, and Edit AGM Custom Forms. The main area is divided into two panes. The left pane, titled 'Resolution List', shows a table with columns 'Description', 'For', and 'Against'. The right pane, titled 'Voting List For Maori Investments Limited Trust 08-Mar-2014 AGM - New Chairperson', shows a table with columns 'For', 'Against', 'SHID', 'Name', 'Trustee - Proxy', 'Shares', 'Votes', and 'Total'. The 'For' column in the right pane is highlighted in yellow. The 'Votes' column in the right pane is highlighted in red, showing a value of 3 for shareholder 163423.

For	Against	SHID	Name	Trustee - Proxy	Shares	Votes	Total
<input checked="" type="checkbox"/>	<input type="checkbox"/>		David		6	1	6
<input checked="" type="checkbox"/>	<input type="checkbox"/>		David		0	3	0

# Resolution's Voting Form

The Voting Form for a resolution can be set by selecting the voting form to use in the Resolution. It can be found by scrolling to the right-most part of the grid. More details on how to add and create a Voting Form will be explained in a later section of this document.



Description	For	Against	Voting Form
→	4	0	

Figure 14. Set the Voting Form

# Creating an Attendee Label

Click the **Edit AGM Custom Forms** icon

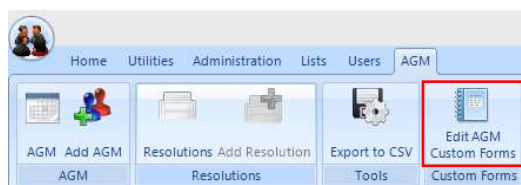


Figure 15. AGM Custom Forms

In the Custom Forms screen, click the **Add** icon.

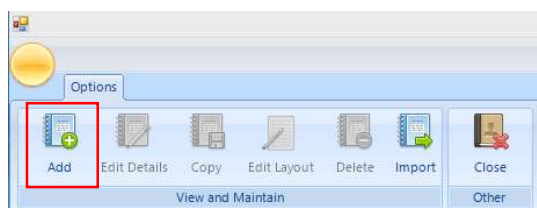
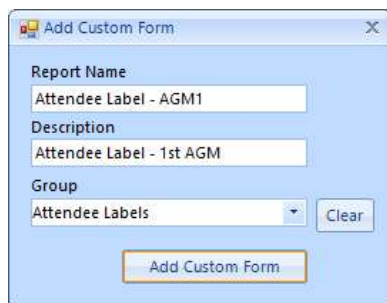


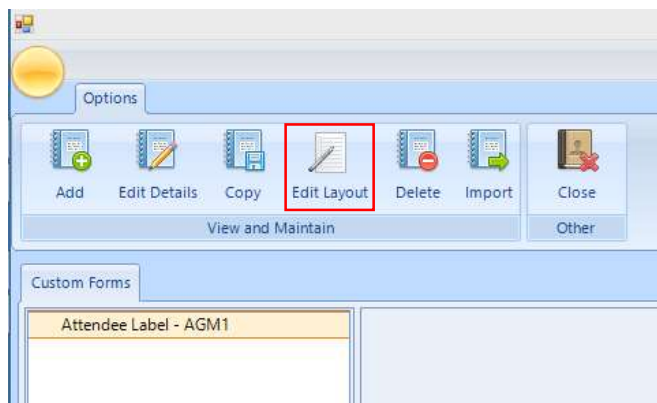
Figure 16. Add icon

Enter the details as shown in figure 17, then click the **Add Custom Form** button.



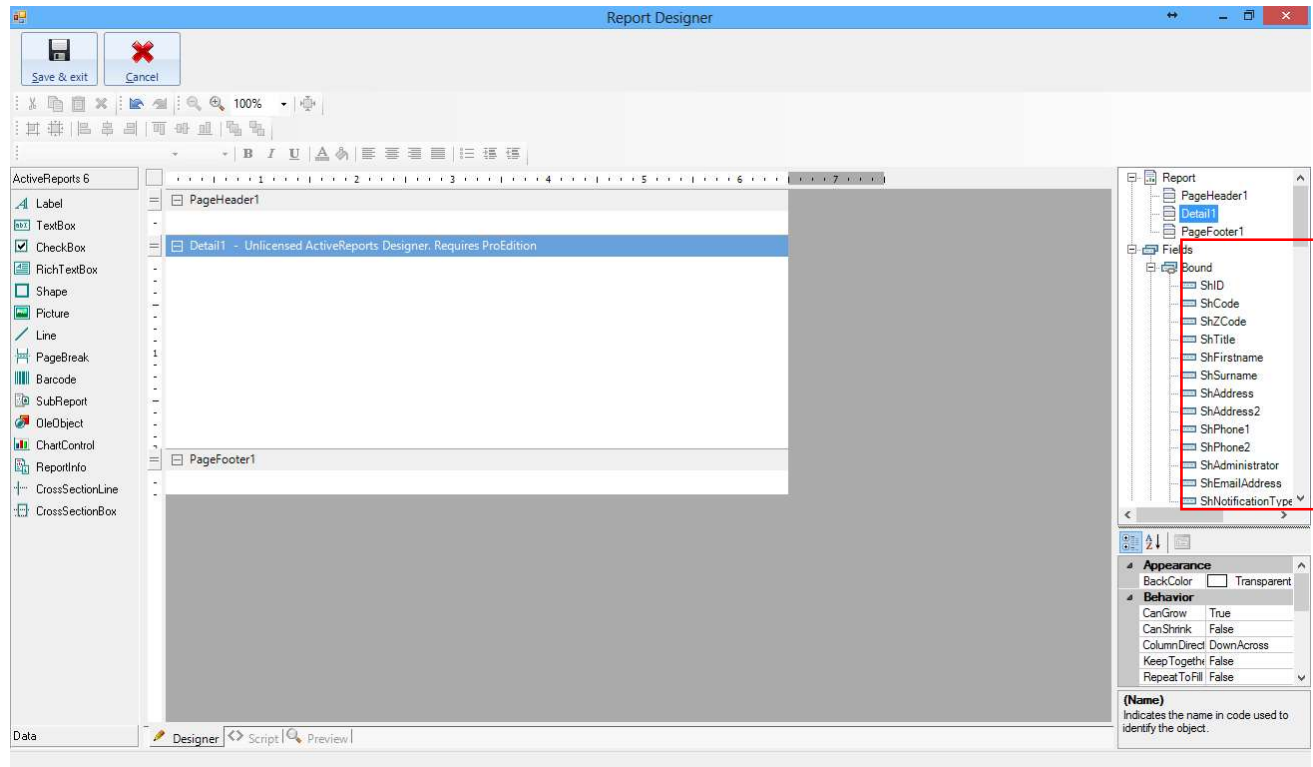
**Figure 17. Attendee Label details**

Select the custom form in the list and click **Edit Layout**.



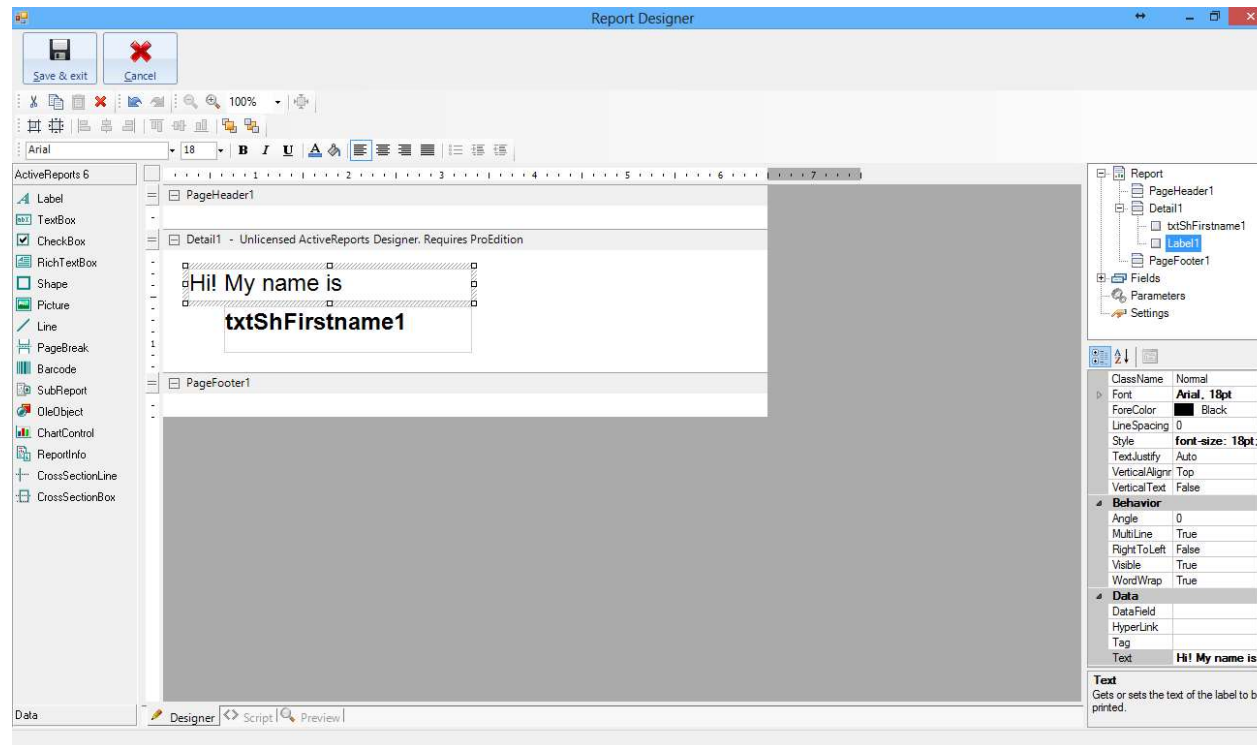
**Figure 18. Click Edit Layout**

In the **Report Designer**, drag the shareholder fields from the **Fields** list into the report to display them.



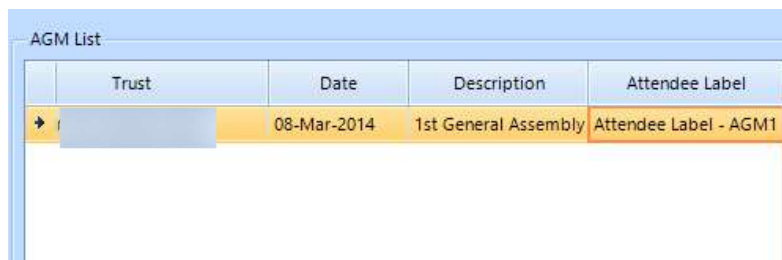
**Figure 19. Report Design**

Modify the report elements as desired. Once done, click the **Save & exit** button.



**Figure 20. Modified Attendee Label**

Use the Attendee Label in an AGM by selecting it in the **Attendee Column** of AGM List

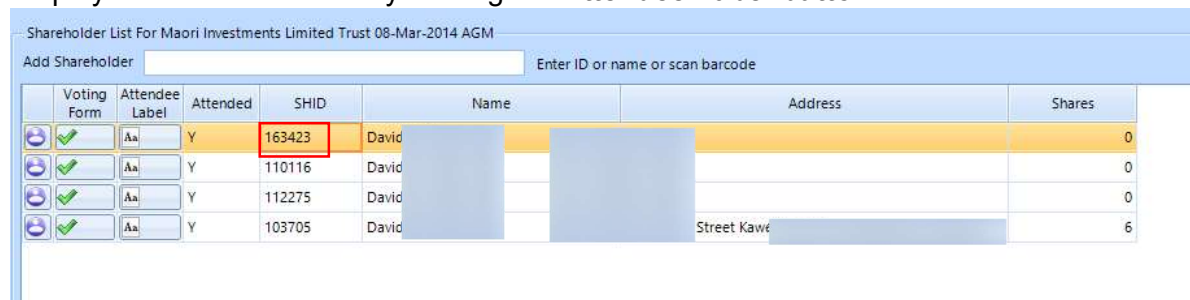


The screenshot shows a table titled "AGM List" with the following columns: Trust, Date, Description, and Attendee Label. The first row of data is highlighted in orange and contains the following values: Trust (partially obscured), Date (08-Mar-2014), Description (1st General Assembly), and Attendee Label (Attendee Label - AGM1).

Trust	Date	Description	Attendee Label
	08-Mar-2014	1st General Assembly	Attendee Label - AGM1

**Figure 21. Set Attendee Label**

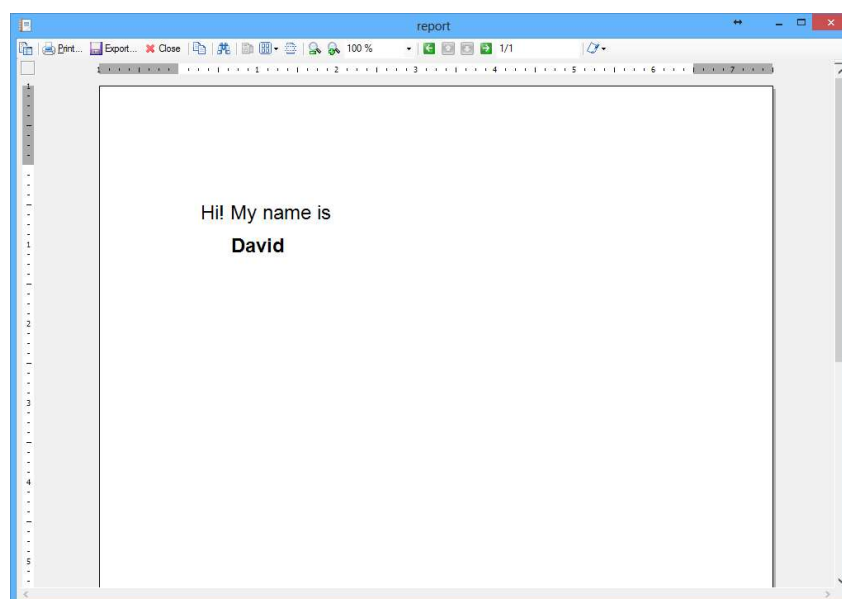
Display the Attendee Label by clicking the **Attendee Label button**



The screenshot shows a table titled "Shareholder List For Maori Investments Limited Trust 08-Mar-2014 AGM". It includes a search bar "Add Shareholder" and a prompt "Enter ID or name or scan barcode". The table has columns: Voting Form, Attendee Label, Attended, SHID, Name, Address, and Shares. The first row of data is highlighted in orange and has the SHID value 163423 highlighted with a red box.

Voting Form	Attendee Label	Attended	SHID	Name	Address	Shares
	Aa	Y	163423	David		0
	Aa	Y	110116	David		0
	Aa	Y	112275	David		0
	Aa	Y	103705	David	Street Kawé	6

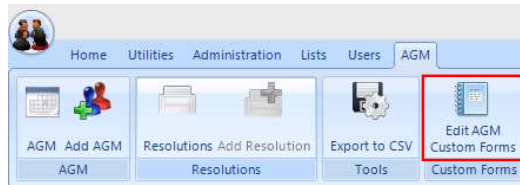
**Figure 22. Click Attendee Label**



**Figure 23. Attendee Label**

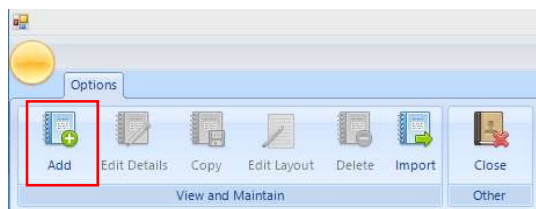
# Creating a Voting Form

Click the **Edit AGM Custom Forms** icon



**Figure 24. AGM Custom Forms**

In the Custom Forms screen, click the **Add** icon.



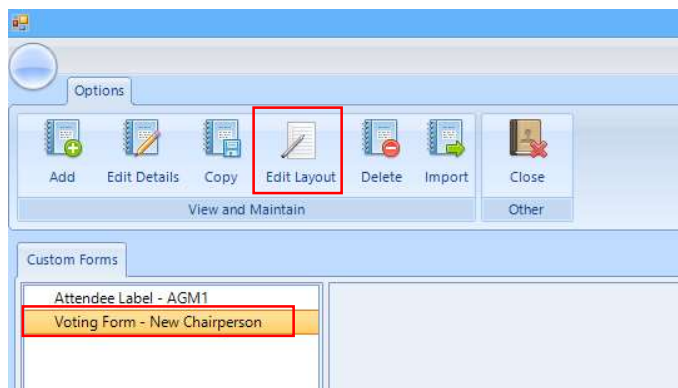
**Figure 25. Add icon**

Enter the details as shown in figure 15 and then click the **Add Custom Form** button.

A screenshot of the 'Add Custom Form' dialog box. It contains three text input fields: 'Report Name' with the value 'Voting Form - New Chairperson', 'Description' with the value 'New Chairperson Voting Form', and 'Group' with a dropdown menu showing 'Voting Forms'. To the right of the 'Group' dropdown is a 'Clear' button. At the bottom of the dialog is a large 'Add Custom Form' button.

**Figure 26. Attendee Label details**

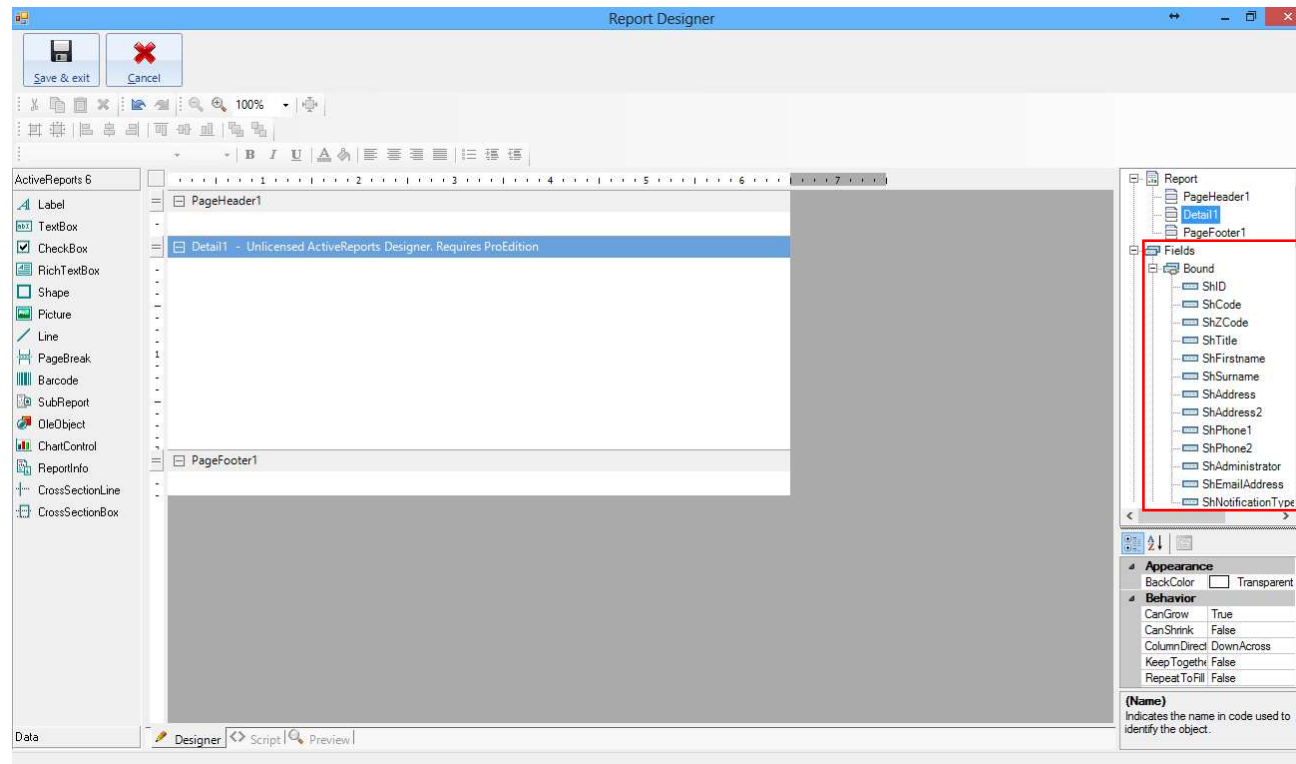
Select the voting form in the list and click **Edit Layout**.



**Figure 27. Click Edit Layout**

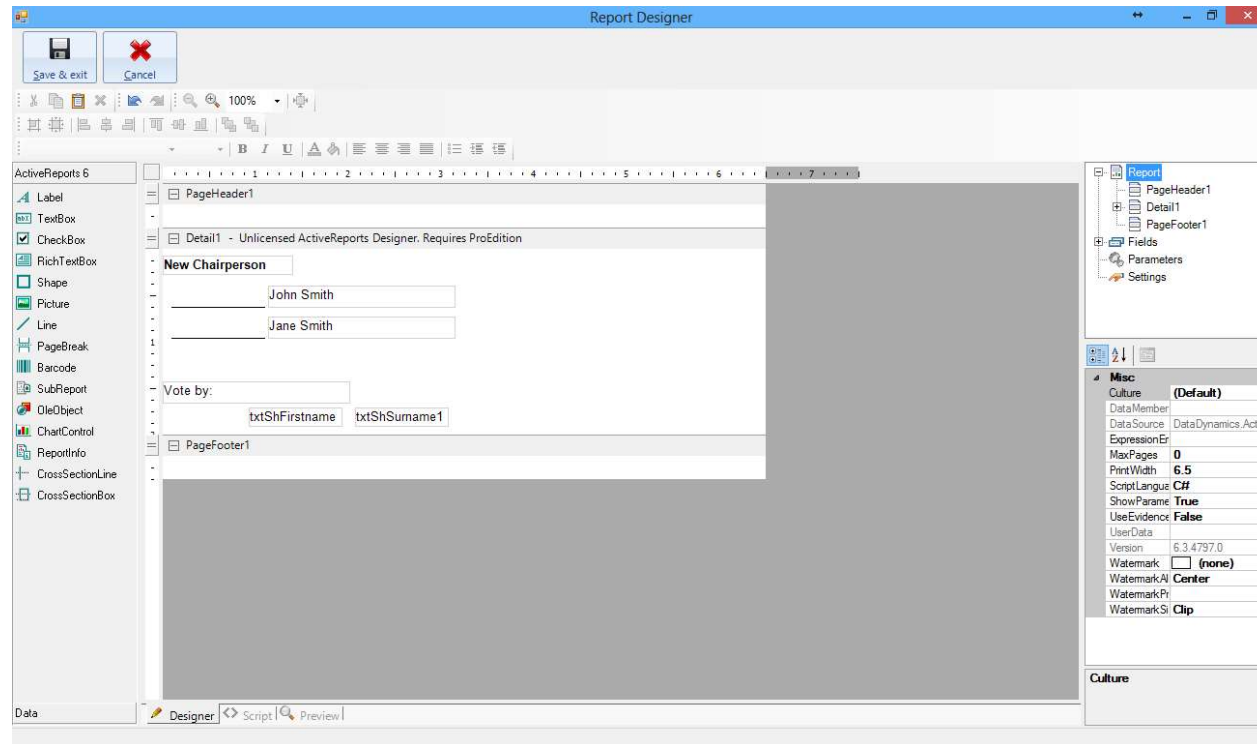


In the **Report Designer**, drag the shareholder fields from the **Fields** list into the report to display them.



**Figure 28. Report Designer**

Modify the report elements as desired. Once done, click the **Save & exit** button.



**Figure 29. Modified Voting Form**

Use the Voting Form in a resolution by selecting it in the **Voting Form** of the Resolution List

	For	Against	Voting Form
→	4	0	Voting Form - New Chairperson

**Figure 30. Set Voting Form**

Display the Voting Form by clicking the **Voting Form** button

Voting Form	Attendee Label	Attended	SHID	Name	Address	Shares
	Aa	Y	103423	David Davis		0
	Aa	Y	110116	David Hika		0
	Aa	Y	112275	David Hona		0
	Aa	Y	103705	David Davis	erau 3127	6

**Figure 31. Click Voting Form**

Select the Resolution to print the Voting Form

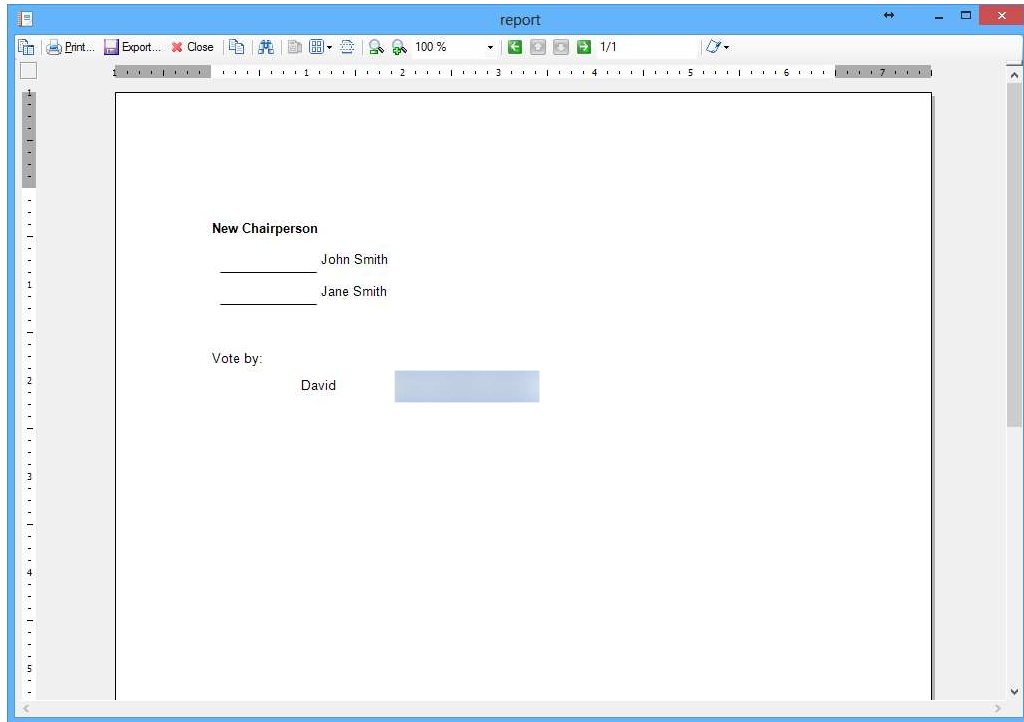
Print Voting Form

Choose the Resolution

New Chairperson

Print Cancel

**Figure 32. Select Resolution**



**Figure 33. Voting Form**

## Voting Form Multiple Page Print Fix

To fix the voting form to not print on more than 1 page if there is only 1 page to print, reduce the width of the page when editing the format.

