



Lighthouse Guide 9: Managing Selections

Lighthouse contains a suite of tools to help you manage candidate selections and make sure that the party knows who your elected representatives are.

This chapter covers how to manage selection processes, add councillors and election results.

Contents

- [View an electoral area](#) (p 2-4)
- [View candidates](#) (p 4-5)
- [Add an election or by-election](#) (p 5-7)
- [Create a selection process](#) (p 7-10)
- [View & Create Application Forms](#) (p 10-13)
- [Creating a shortlisting committee](#) (p 13-15)
- [Create an applicant](#) (p 15-17)
- [Manage selection processes](#) (p 17-22)
- [Downloading a selection list](#) (p 22-23)
- [Add an agent](#) (p 23-24)
- [Add a selected candidate](#) (p 25-27)
- [Add a Councillor](#) (p 27-32)
- [Add an election result](#) (p 32-33)

Permissions Required

	View	Edit	Create
View an electoral area	✓		
View candidates	✓		
Add a by-election			✓

Lighthouse Guide 9: Managing Selections

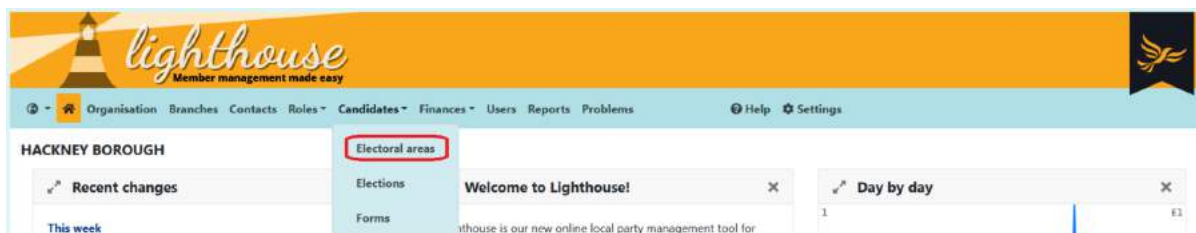
Create a selection process			✓
View Application Forms	✓		
Create Application Forms			✓
Create a shortlisting committee			✓
Create an applicant			✓
Manage selection processes		✓	
Downloading a selection list	✓		
Add an agent			✓
Add a selected candidate			✓
Add a councillor		✓	
Add an election result		✓	

View an electoral area


Step 1

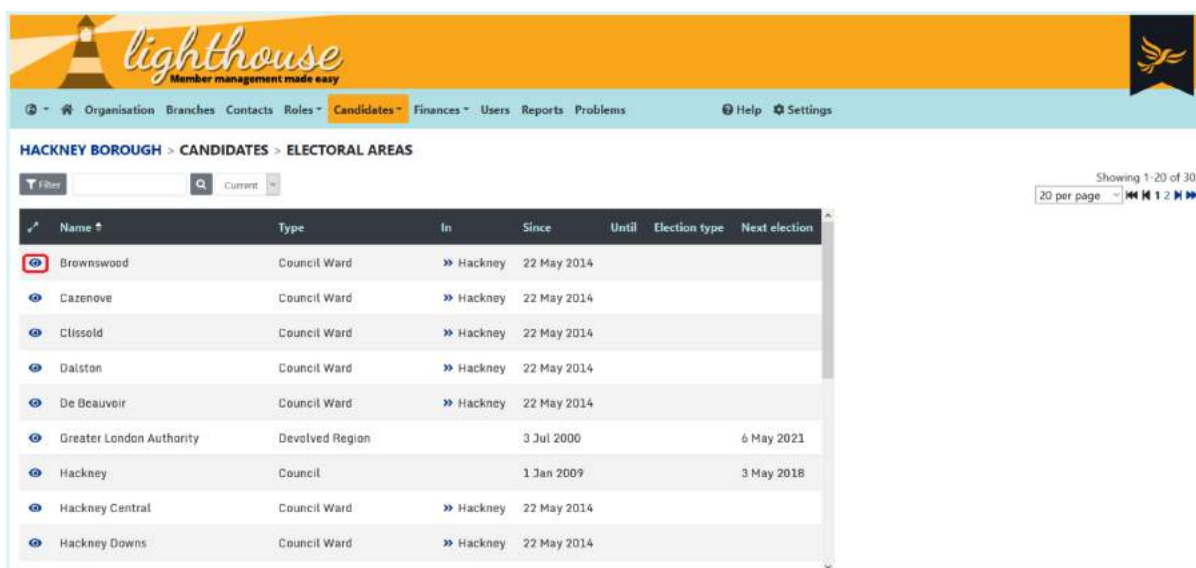
To access electoral areas, once logged into Lighthouse click on "Candidates" in the blue menu bar at the top; then select "Electoral Areas" sub-tab from the drop-down menu which appears.

Lighthouse Guide 9: Managing Selections



Step 2

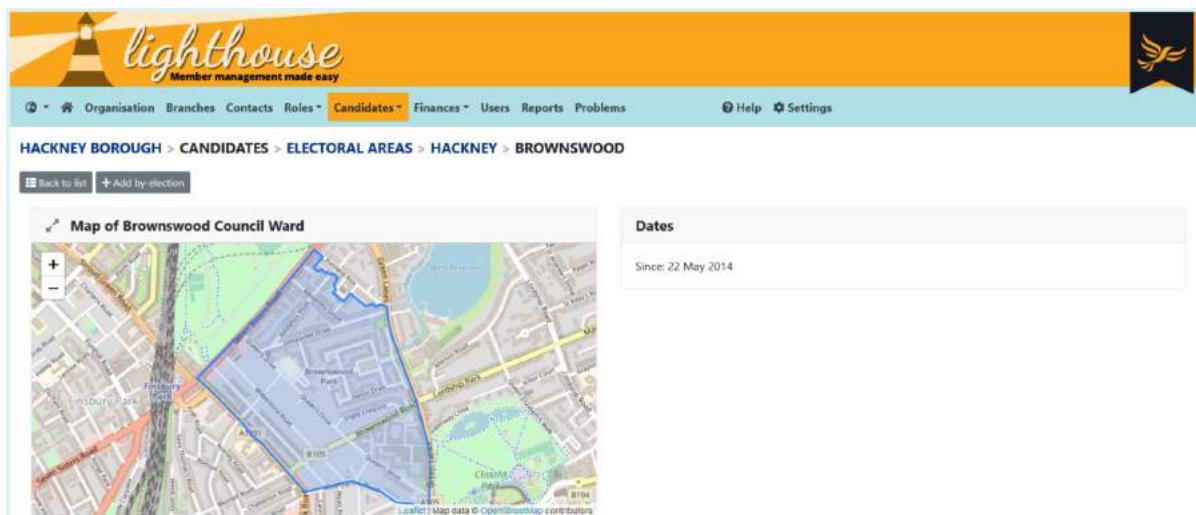
You will be directed to the Electoral Areas page, where you can see all the electoral areas in your local party. Areas that partly overlap with your local party are also shown. To view the boundaries of the electoral area and add an upcoming by election, click the eye  link on the left of the list.



Step 3

You will be directed to the page for that ward. These will show all the electoral areas, from council ward up to Westminster constituency. Here you can also see the dates when the area was created and the date of the next election for that area.

Lighthouse Guide 9: Managing Selections



If you would like to add an election for this ward, click the “Add election” action button

+ Add election

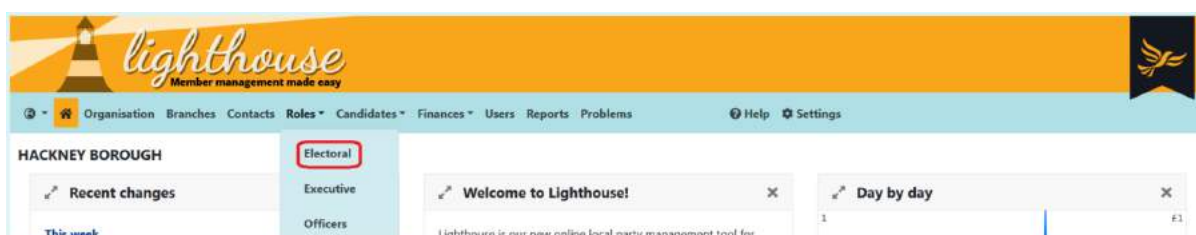
and follow the [steps set out here](#).

View candidates

Once your candidates have been selected (you can find out how to do this here), they will appear in the Candidates Tab.

Step 1

To view candidates, once logged into Lighthouse, click on “Roles” in the blue menu bar at the top; then select the “Electoral” sub-tab from the drop-down menu which appears.



Step 2

You will be directed to a list of elected office holders, candidates and the upcoming elections they have been selected for. You can filter and download a list of selected candidates, by clicking “Download” or “Filter”.

Lighthouse Guide 9: Managing Selections



Reference	Position	Election	Constituency type	Holder	Email
MPR00237509	AM	Greater London Authority	London List - LONDON2016	Devolved Region	Caroline Pidgeon
MPR00238519	Prospective London Assembly Candidate	North East	GLA2021	Devolved Constituency	Kate Pothalingam
MPR00238544	Prospective London Assembly Candidate	Greater London Authority	London List GLA2021	Devolved Region	Caroline Pidgeon

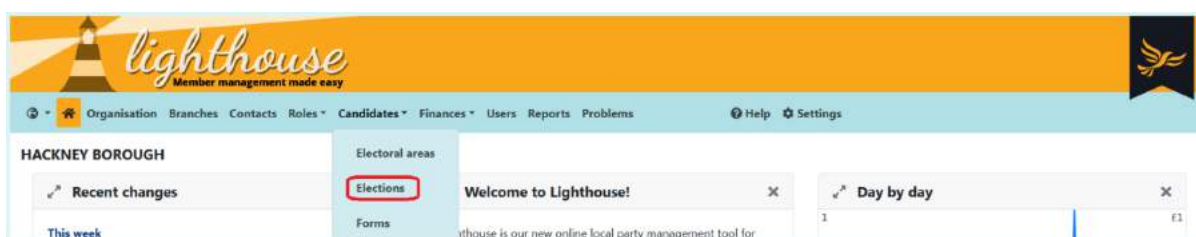
Add an election or by-election

All full elections will automatically be added to Lighthouse, but you will need to add the by-elections that are happening in your area. If you are a local user, you will only be able to add local by-elections or historic elections; you will need to be a regional user or higher to add Parliamentary by-elections.

Step 1

To add an election or by-election click on “Candidates” in the blue menu bar at the top; then select “Elections” sub-tab from the drop-down menu which appears.

You can also do this by selecting the Electoral Areas sub-tab and then selecting the electoral area you wish to create a by-election for.



Step 2

You will be directed to the Elections page, where you can see all the upcoming elections in your local area. To add a new by-election or a historic election, click the “Add election”

action button  .

Lighthouse Guide 9: Managing Selections

NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS

+ Add election Filter

Showing 1-20 of 46 20 per page

id	Type	Name	Constituency type	Vacancies	Selected	Nominations close	Date	Spending return due	Term ends	Electorate	Turnout	Spilled ballots
	Scheduled	Edinburgh East	GE2024 Westminster Constituency	1	0	3 Apr 2024	1 May 2024	6 Jun 2024				
	Scheduled	Edinburgh North and Leith	GE2024 Westminster Constituency	1	0	3 Apr 2024	1 May 2024	6 Jun 2024				
	Scheduled	Edinburgh South	GE2024 Westminster Constituency	1	0	3 Apr 2024	1 May 2024	6 Jun 2024				
	Scheduled	Edinburgh South West	GE2024 Westminster Constituency	1	0	3 Apr 2024	1 May 2024	6 Jun 2024				
	Scheduled	Almond	CDUNCIL2022 Council Ward	1	1	5 May 2022		5 May 2027				
	Scheduled	Edinburgh City Centre	CDUNCIL2022 Council Ward	1	0	5 May 2022		5 May 2027				

Step 3

You will be directed to the new election page. You will need to work through each of the questions to add your by-election:

- Select what type of election it is from the dropdown menu.
- Add the election date. You can do this either by typing the date in the box, or clicking the calendar icon and selecting the date.
- Select the electoral area for the election by typing its name into the box and selecting the correct one from the list of suggestions that appears. Note that if you have selected to add an election from an electoral area record this box will already be filled out for you.
- Add a name for the election, so you can easily identify it in the list of upcoming elections (this will be generated automatically, but you can modify it)
- Select the number of vacancies that need to be filled. This will usually be one, but if you have multiple councillors step down in a multi-member ward, you will need to change this.
- Add the key dates for the by-election, this includes the date nominations close, when the spending return is due and when the term ends. You can do this by typing in the dates, or selecting the dates by clicking the calendar icon.

lighthouse
Member management made easy

Organisation Branches Contacts Roles Candidates Finances Training Users Reports Tasks Greg Foster Help Settings

NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > NEW

+ back to list

Type *
Scheduled
Election date *
dd/mm/yyyy
Set to today / yesterday

Constituency or electoral area *
Start typing the name of an electoral area to see suggestions.
You can only choose an electoral area associated with your party. To add an election outside your party, please contact us.

Name

Number of vacancies *
1
The number of seats up for election.

Nominations close
dd/mm/yyyy
Set to today / yesterday

Spending return due
dd/mm/yyyy
Set to today / yesterday

Term ends
dd/mm/yyyy
Set to today / yesterday

Electorate
The total electorate, if known, as an absolute number of people.

Turnout
The total number of people who voted, if known.

Spilled ballots
The total number of spoiled ballots, if known.

Cancel Save & add another Save

Lighthouse Guide 9: Managing Selections

Once this is done, you will need to click 'save', or 'save and add another' if you have multiple upcoming by-elections

Once the election or by-election has happened, you will ideally update this record with the results of that election, including who was elected. [You can find out how to do that here.](#)

Create a selection process

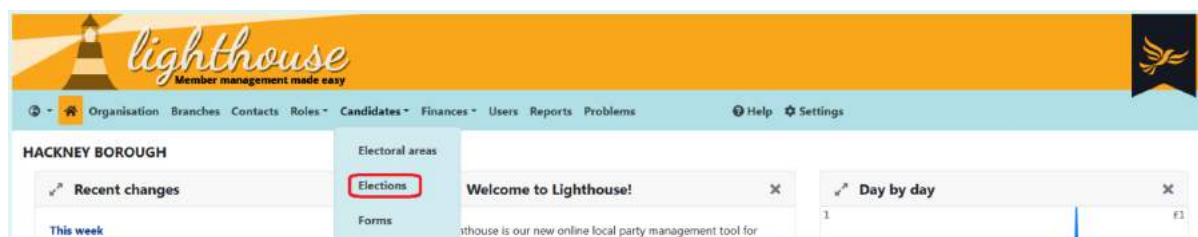
A selection process is created to manage the process of selecting a candidate. If you're not using Lighthouse to manage your selection and just need to add a candidate you've selected in another way, [you can skip ahead to here.](#)

If only you have access to a local party, you will only be able to add the selection process for local elections. If you have state or federal access, you will be able to add Westminster and Devolved Region selections as well. The process on Lighthouse is the same, regardless of the level of the selection.

Step 1


To create a selection, click on "Candidates" in the blue menu bar at the top; then select the "Elections" sub-tab from the drop-down menu which appears.

You can also do this from the "Electoral Areas" sub-tab if you prefer.



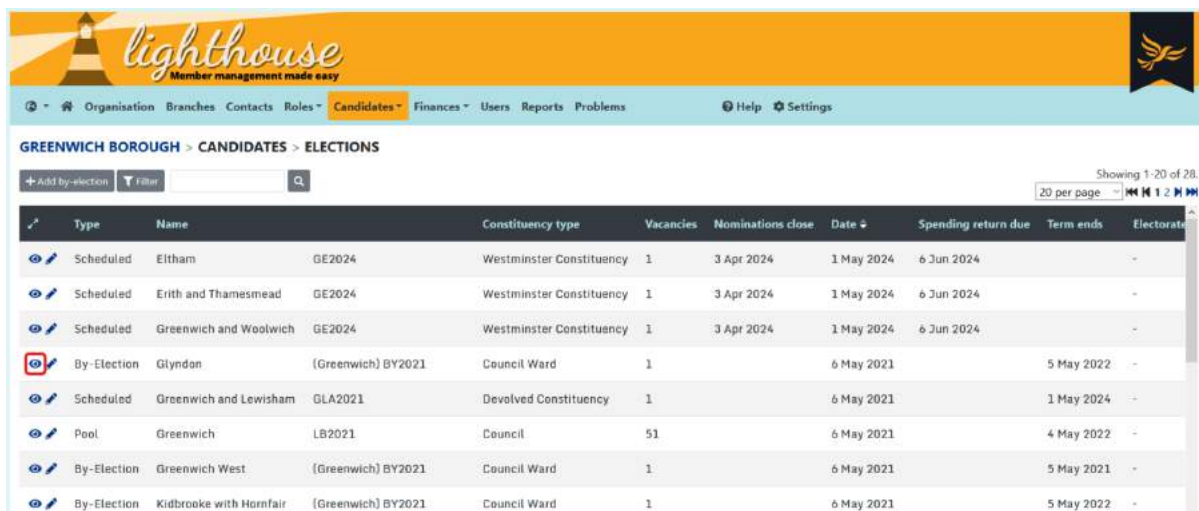
Step 2

You will be directed to the Elections page, where you can see all the upcoming elections in your local area, as well as the historic elections and their results.

To add a new selection process for a local election or by-election, click on the eye  link to the left of the list for the election you want to add a selection for.

As a local user, you will be able to view other types of upcoming elections - like Westminster, Holyrood or Senedd elections but you will not be able to add a selection process for them.

Lighthouse Guide 9: Managing Selections

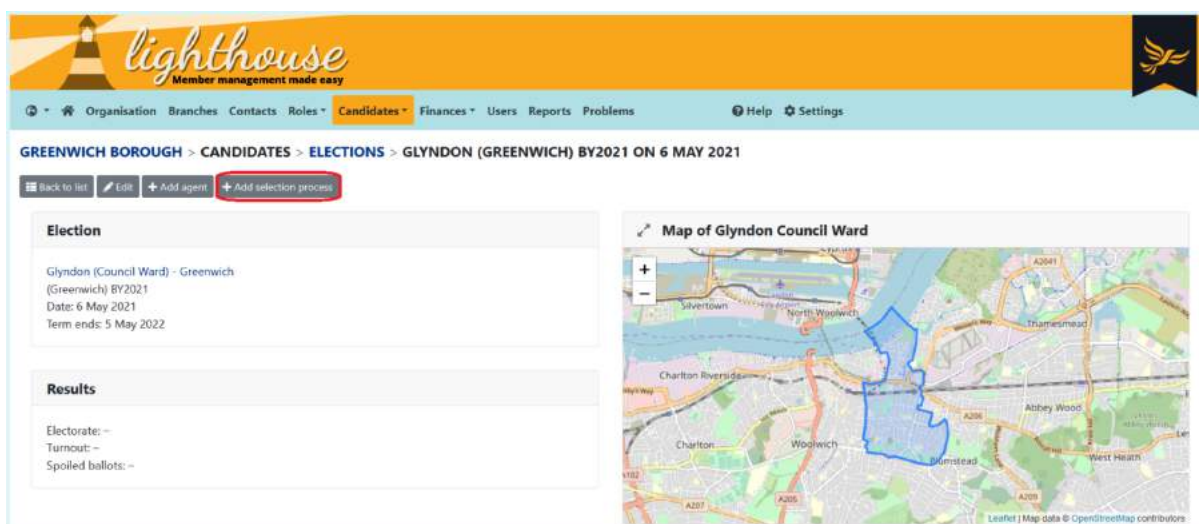


The screenshot shows the Lighthouse software interface. The top navigation bar includes 'Organisation', 'Branches', 'Contacts', 'Roles', 'Candidates', 'Finances', 'Users', 'Reports', 'Problems', 'Help', and 'Settings'. The main content area is titled 'GREENWICH BOROUGH > CANDIDATES > ELECTIONS'. Below this is a search bar and a table of elections. The table has columns for Type, Name, Constituency type, Vacancies, Nominations close, Date, Spending return due, Term ends, and Electorate. The row for 'Glyndon (Greenwich) BY2021' is highlighted with a red box.

Type	Name	Constituency type	Vacancies	Nominations close	Date	Spending return due	Term ends	Electorate
Scheduled	Eltham	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	-	-
Scheduled	Erith and Thamesmead	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	-	-
Scheduled	Greenwich and Woolwich	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	-	-
By-Election	Glyndon	(Greenwich) BY2021	1		6 May 2021		5 May 2022	-
Scheduled	Greenwich and Lewisham	GLA2021	1		6 May 2021		1 May 2024	-
Pool	Greenwich	LB2021	51		6 May 2021		4 May 2022	-
By-Election	Greenwich West	(Greenwich) BY2021	1		6 May 2021		5 May 2021	-
By-Election	Kidbrooke with Hornfair	(Greenwich) BY2021	1		6 May 2021		5 May 2022	-

Step 3

You will be directed to the detail page for the upcoming election you selected. Here you can view all the details for the upcoming election, including the boundaries, date ends of the election and the date the spending return is due by. Click the “Add selection process” action button to begin creating your selection process.



The screenshot shows the Lighthouse software interface for the 'GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021' election. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021'. Below this is a search bar and a table of actions: 'Back to list', 'Edit', 'Add agent', and 'Add selection process' (highlighted with a red box). The 'Election' section shows: 'Glyndon (Council Ward) - Greenwich', '(Greenwich) BY2021', 'Date: 6 May 2021', and 'Term ends: 5 May 2022'. The 'Results' section shows: 'Electorate: -', 'Turnout: -', and 'Spoiled ballots: -'. To the right is a map titled 'Map of Glyndon Council Ward' showing the ward boundaries in blue.

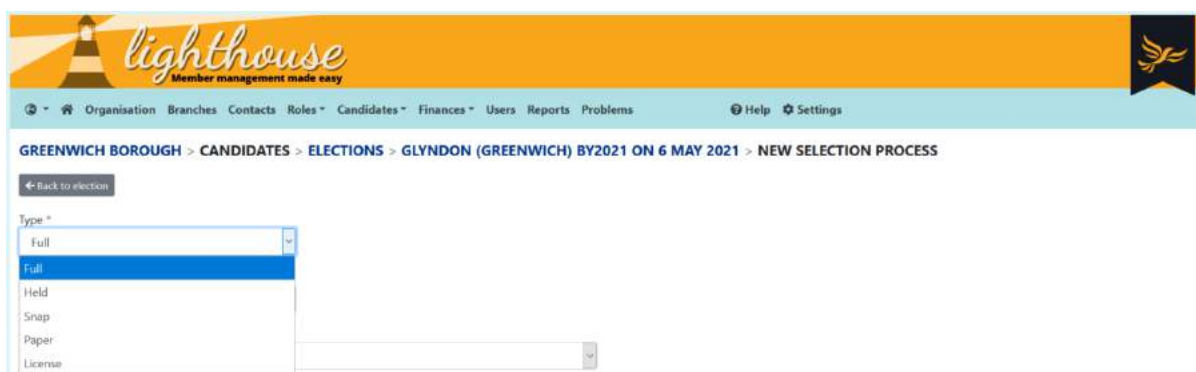
Step 4

You will be directed to the new selection process page. To get started, choose what type of selection you are holding (full, held, snap, paper or license).

- Full is a selection process held under your normal rules, for a normal seat
- Held is a simplified process for re-selecting incumbents

Lighthouse Guide 9: Managing Selections

- Snap is an emergency process, usually used for a by-election or snap general election
- Paper is a simplified process where you're finding a candidate for a ward you aren't working or aiming to win
- License is a process whereby someone who is not an approved candidate is approved to stand.



Step 5

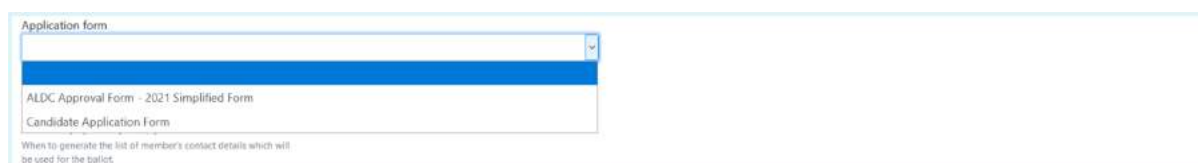
Next, select the criteria you are using to select your candidates. Can all members apply, or is it only open for people from certain backgrounds?



Step 6

Then select which form you will be asking the applicants to complete. There will be standard ones preloaded, but if you want to add your own, you can create one in forms.

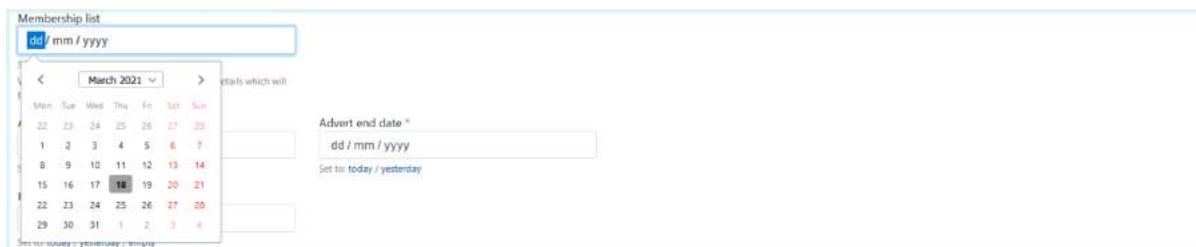
[You can find guidance on how to do this here.](#)



Lighthouse Guide 9: Managing Selections

Step 7

Choose the date you want to be the cut-off date for your membership list. This will be the date people will have to be members in the constituency to vote in the selection process. This should be the same date that your advert closes.

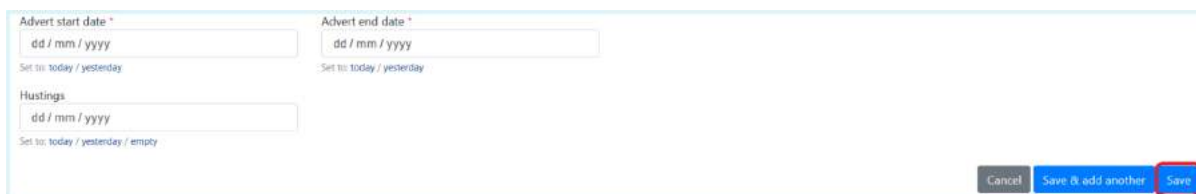


The screenshot shows a form titled "Membership list". At the top, there is a text input field with a placeholder "dd / mm / yyyy". Below this is a date picker calendar for "March 2021". The calendar shows days from 1 to 31, with the 18th highlighted. To the right of the calendar is a label "Advert end date *" followed by another text input field with a placeholder "dd / mm / yyyy". Below this input field is a link "Set to: today / yesterday".

Step 8

Select the date the advert goes live, and the date that it ends. Adverts are usually up for two to three weeks. You must ensure these dates have been agreed with your returning officer.

Next, enter the date of your hustings (if you're holding one), then click "Save". You will be taken back to the selection page, where you can view the details for the selection.

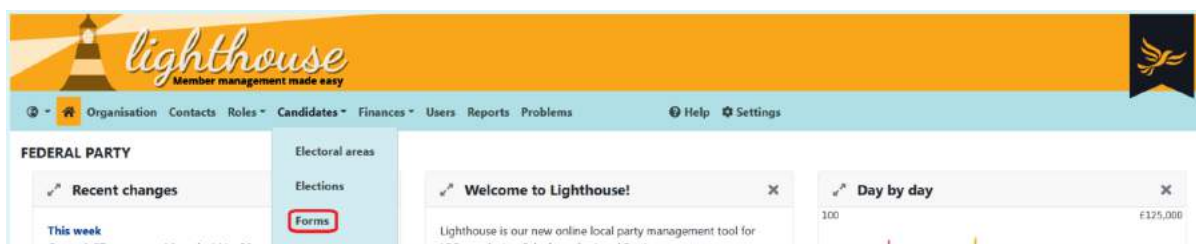


The screenshot shows a form with three main sections. The first section is "Advert start date *" with a text input field "dd / mm / yyyy" and a link "Set to: today / yesterday". The second section is "Advert end date *" with a text input field "dd / mm / yyyy" and a link "Set to: today / yesterday". The third section is "Hustings" with a text input field "dd / mm / yyyy" and a link "Set to: today / yesterday / empty". At the bottom right, there are three buttons: "Cancel", "Save & add another", and "Save".

View & Create Application Forms

Step 1

To create or view an application form click on "Candidates" in the blue menu bar at the top; then select the "Forms" sub-tab from the drop-down menu which appears.



Lighthouse Guide 9: Managing Selections

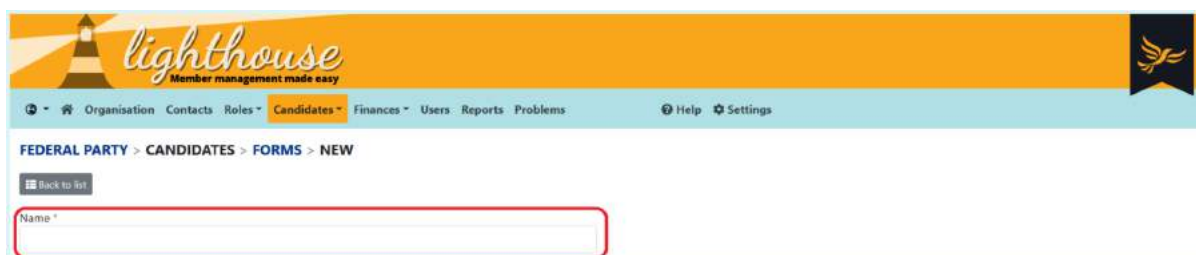
Step 2

You will be directed to the Forms page, where you can see all your existing application forms. A series of standard forms will be preloaded into Lighthouse, so you can choose from those, depending on which form you want to use for your selection. To create a new application form, click "Add new".



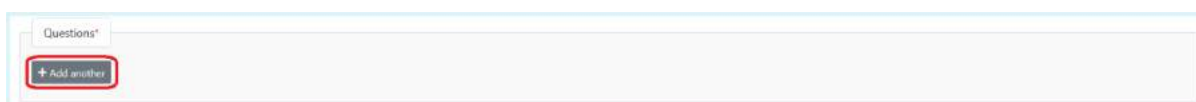
Step 3

First, type a name for your form into the "Name" field.



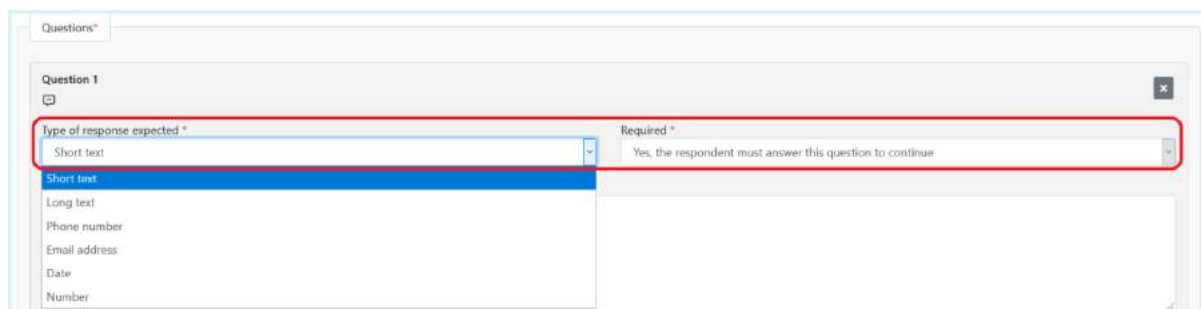
Step 4

To add questions to your form, click "Add another".

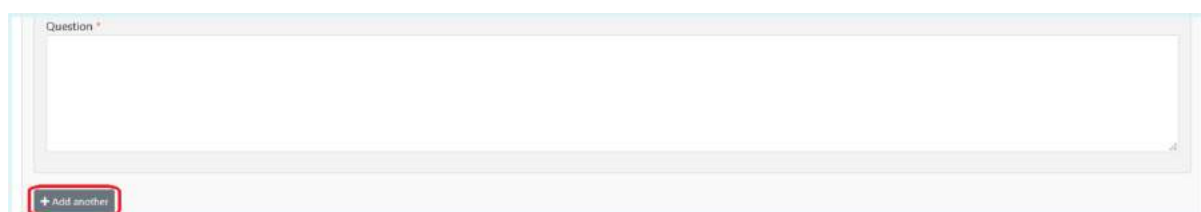


For each question, you will need to select a question type from the "Type of response expected" drop-down list, as well as whether or not it is required.

Lighthouse Guide 9: Managing Selections



Type the question you want to ask into the “Question” box. To add more questions, click “Add another” again. To delete a question, click the “X” above the “Required” drop-down.



Step 5

If you are a Regional, State or Federal user, you can opt to share your new form with all the organisations below your own in the hierarchy (for example, all the local parties in your Region). Click “Share this form with all descendant organisations” to do so.

When your form is complete, click “Save” or “Save and add another” to create a new form.



Step 6

You will be directed back to the Forms page. To edit a form, click the pencil icon next to the form’s name in the table.



Lighthouse Guide 9: Managing Selections

Step 7

You will be directed to the edit page. To edit a question, click the grey box it is in.

The screenshot shows the Lighthouse web application interface. At the top, there is a navigation menu with 'Candidates' highlighted. Below the menu, the breadcrumb trail reads 'FEDERAL PARTY > CANDIDATES > FORMS > ALDC APPROVAL FORM - 2021 SIMPLIFIED FORM > EDIT'. A 'Back to list' button is visible. The main content area contains a form with a 'Name' field and a 'Questions' section. The 'Questions' section lists three questions: 'Question 1' (Full Name), 'Question 2' (Address), and 'Question 3' (Date of Birth). Each question is enclosed in a grey box with an 'x' icon in the top right corner, indicating it can be edited.

Creating a shortlisting committee

Shortlisting committees are the people responsible for candidate selection. Lighthouse enables you to record who they are. You may also want to record in the Training module that those people have been trained in how to sit on a shortlisting committee, so that it's easier to assemble these committees in the future - as you know who has practical experience of doing it.

Step 1

After creating your selection process, you will be returned to the detail page for the relevant local election. To create a short-listing committee, click on the selection process at the bottom of this page.

Lighthouse Guide 9: Managing Selections

Election

Glyndon (Council Ward) - Greenwich
(Greenwich) BY2021
Date: 6 May 2021
Term ends: 5 May 2022

Results

Electorate: -
Turnout: -
Spoiled ballots: -

Advertised full selection

Reference	Name	Applied	Status
No applicants			

Map of Glyndon Council Ward

Step 2

You will be directed to the selection process detail page. To add a member of the short-listing committee click 'Add committee member' action button

+ Add committee member

at the top of the selections page.

lighthouse
Member management made easy

Organisation Branches Contacts Roles Candidates Finances Users Reports Problems Help Settings

GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION

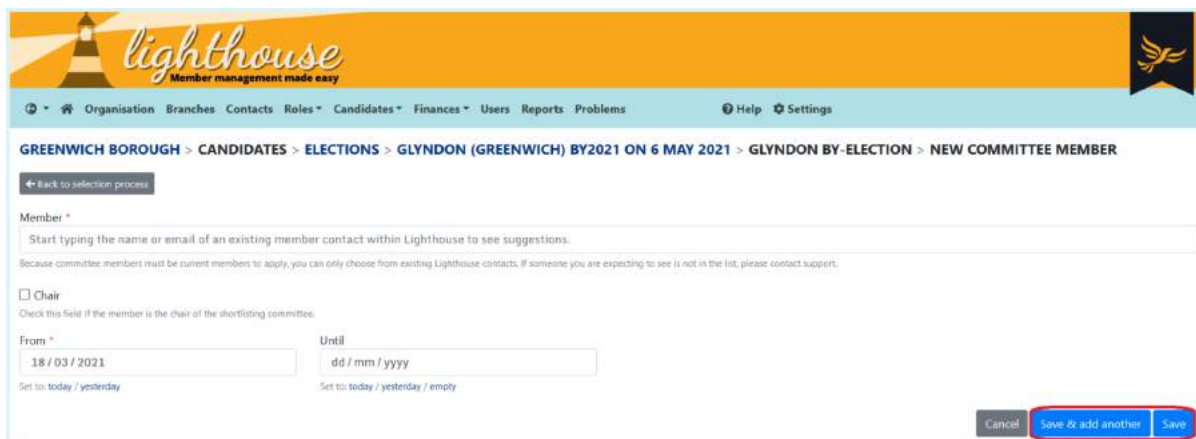
+ Add committee member

Election **Selection process**

Step 3

You will be directed to the new committee member page. To add the member, type their name into the Member box. This will generate a list of members, from which you can select the correct person. Members within your local party will appear at the top of the list. If a member is not in your local party, you can still add them to your short-listing committee.

Lighthouse Guide 9: Managing Selections



The screenshot shows the Lighthouse web application interface. At the top, there is a navigation menu with items like Organisation, Branches, Contacts, Roles, Candidates, Finances, Users, Reports, Problems, Help, and Settings. The breadcrumb trail reads: GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION > NEW COMMITTEE MEMBER. Below the breadcrumb, there is a 'Back to selection process' button. The main form area has a 'Member *' label and a text input field with the placeholder text 'Start typing the name or email of an existing member contact within Lighthouse to see suggestions.' Below this is a note: 'Because committee members must be current members to apply, you can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.' There is a 'Chair' checkbox with the label 'Chair' and the instruction 'Check this field if the member is the chair of the shortlisting committee.' Below this are two date input fields: 'From *' with the value '18 / 03 / 2021' and 'Until' with the placeholder 'dd / mm / yyyy'. There are also links for 'Set to: today / yesterday' for both fields. At the bottom right, there are three buttons: 'Cancel', 'Save & add another', and 'Save'.

If the member you are adding is the Chair of the short-listing committee, you can tick the box that says 'Chair'. You can only have one chair of each short-listing committee.

Select the start and end dates for the short-listing committee member to be in post. You can do this by typing in the date into the boxes, or by clicking the calendar icon.

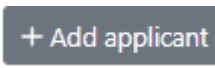
Next, click "Save", or "Save and add another" to add a new short-listing committee member.

Create an applicant

Next, we need to add our applicants. We've already set up our selection process and hopefully advertised the selection, now, as candidates apply, we're going to add their details to the system so that we're ready to start managing the process in Lighthouse.

You'll enter details using the application form you set up (or an HQ set up one) in the last step.

Step 1

You can add applicants from the selection process detail page. To do so, click 'Add applicant'  action button at the top of the selection page.



The screenshot shows the Lighthouse web application interface. At the top, there is a navigation menu with items like Organisation, Branches, Contacts, Roles, Candidates, Finances, Users, Reports, Problems, Help, and Settings. The breadcrumb trail reads: GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION. Below the breadcrumb, there is a row of buttons: 'Back to election', 'Edit', 'Add returning officer', 'Add committee member', and 'Add applicant'. The 'Add applicant' button is highlighted with a red box. Below this row, there are two tabs: 'Election' and 'Selection process'.

Lighthouse Guide 9: Managing Selections

Step 2

You will be directed to the new applicant page. To add a member as an applicant, type their name into the Member box. This will generate a list of members, from which you can select the correct member.

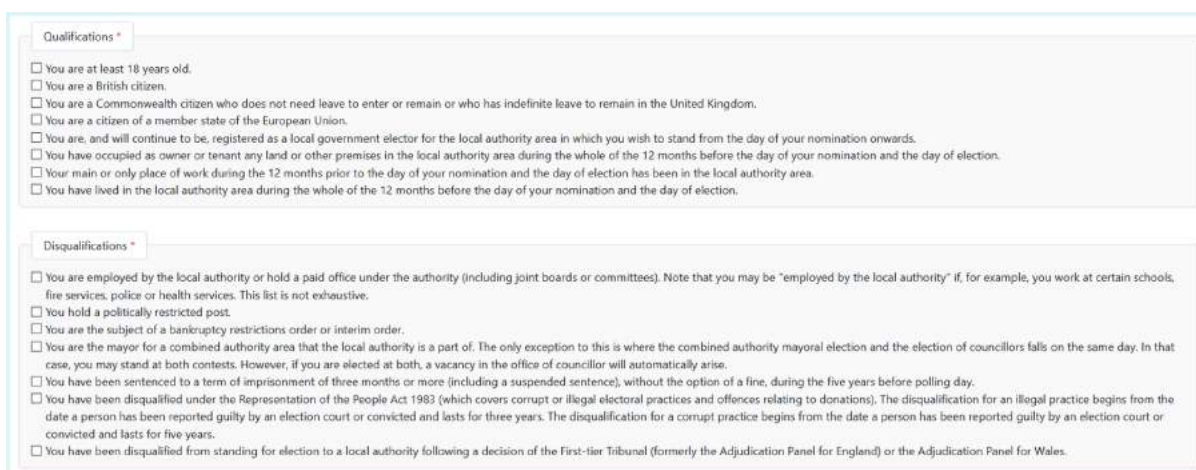
Members within your local party will appear at the top of the list. If a member is not in your local party, you can still add them as an applicant.



Step 3

Go through the lists of qualifications and disqualifications and tick any that are applicable. You may need to discuss this with the applicant.

This will let you know if that member is eligible to stand in the selection. If they are not, a warning will appear to let you know they are ineligible. You will still be able to add them as an applicant, as they might be able to become eligible.



Step 4

Next, add any comments in the box at the bottom of the page. Please be aware that these can be made public in response to a subject access request.

Lighthouse Guide 9: Managing Selections

Once you are finished, click “Save”, or “Save and add another” to add a new applicant.



The comments box exists to allow you to make notes on the applicant as they move through the process and give additional context around decisions.

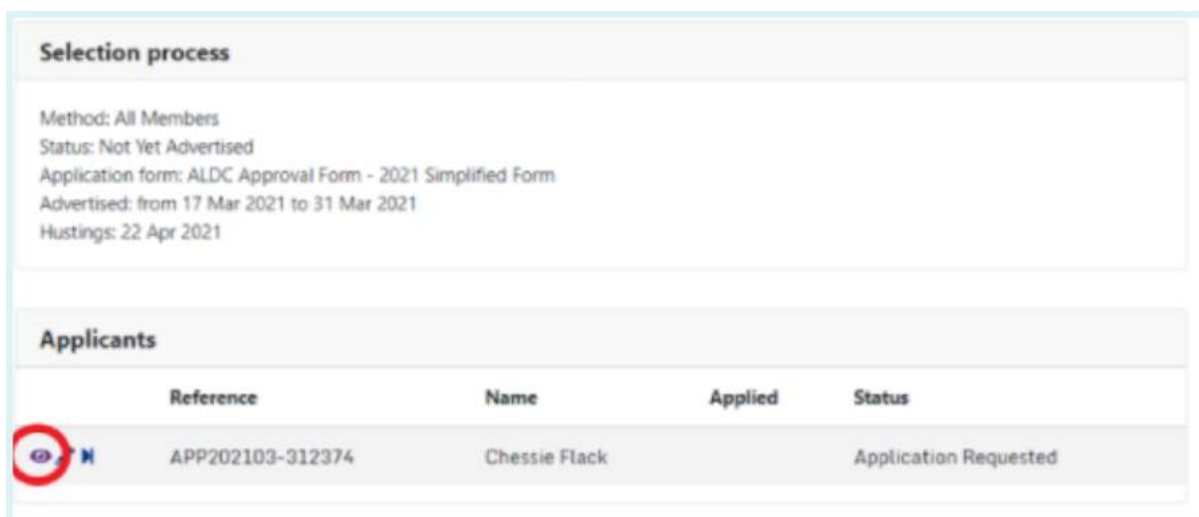
Manage selection processes

We’ve now got a selection process, with a selection committee, returning officer and applicants listed. All that’s left now is to use Lighthouse to manage the applicant journey through the process to selection.

Step 1

Once all the applicants and short-listing committee members have been added, you can move the applicants through the selection process. To do this, navigate to the selection process page.

To view the details of the applicant, and to move them through the selection process, click the eye icon next to their name, on the selection page.

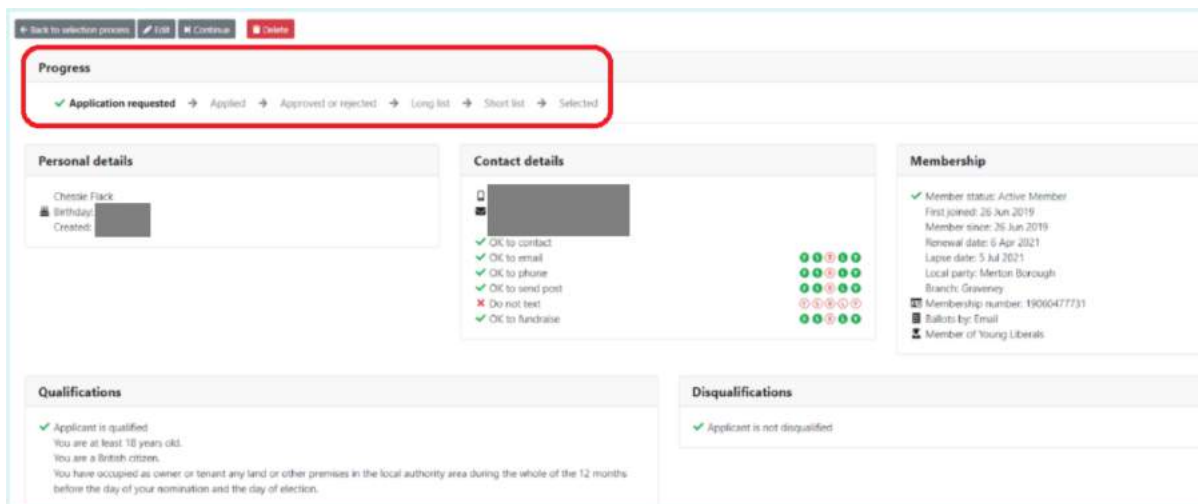


Selection process			
Method: All Members	Status: Not Yet Advertised	Application form: ALDC Approval Form - 2021 Simplified Form	Advertised: from 17 Mar 2021 to 31 Mar 2021
Hustings: 22 Apr 2021			
Applicants			
Reference	Name	Applied	Status
APP202103-312374	Chessie Flack		Application Requested

Lighthouse Guide 9: Managing Selections

Step 2

You will be directed to the applicant page. You can see where the applicant is in the process in the bar across the top.

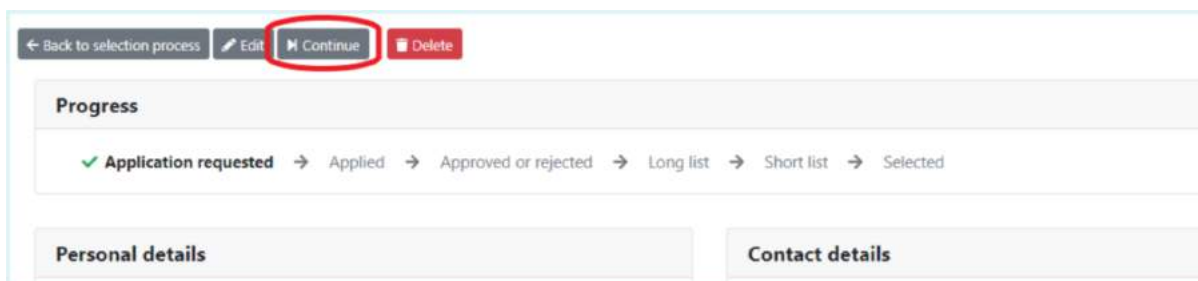


The screenshot shows the applicant page interface. At the top, there is a navigation bar with buttons for 'Back to selection process', 'Edit', 'Continue', and 'Delete'. Below this is a 'Progress' section with a horizontal bar showing the stages: 'Application requested' (checked), 'Applied', 'Approved or rejected', 'Long list', 'Short list', and 'Selected'. The 'Application requested' stage is highlighted with a red box. Below the progress bar are several sections: 'Personal details' (Name: Chelsea Flock, Birthday, Contact), 'Contact details' (with a list of communication preferences: OK to contact, OK to email, OK to phone, OK to send post, Do not text, OK to fundraise), 'Membership' (Member status: Active Member, First joined: 25 Jun 2019, Renewal date: 6 Apr 2021, Lapse date: 5 Jul 2021, Local party: Merton Borough, Branch: Gaveney, Membership number: 19060477731, Ballots by: Email, Member of Young Liberals), 'Qualifications' (Applicant is qualified, You are at least 18 years old, You are a British citizen, You have occupied as owner or tenant any land or other premises in the local authority area during the whole of the 12 months before the day of your nomination and the day of election), and 'Disqualifications' (Applicant is not disqualified).

Step 3

Once you have received the application from the applicant, click the 'continue'

 action button.



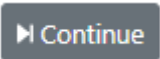
This screenshot is similar to the previous one, but the 'Continue' button in the top navigation bar is highlighted with a red box. The 'Progress' bar and other sections are visible but not detailed.

You will be directed to complete the application form. You can upload this as a PDF or copy the answers of the applicant into the form.



The screenshot shows the application form completion page. It has a 'Back to selection process' button at the top left. The main content area has two sections: 'Upload the completed application form' with a 'Browse' button, and 'and/or fill out the application form answers'. Below this are two sections: 'Answers' and '1. Full Name' with a text input field. Below that is '2. Address' with a text input field.

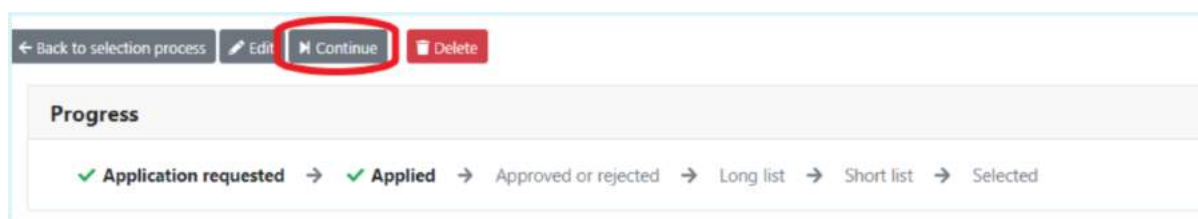
Lighthouse Guide 9: Managing Selections

Click the 'continue'  action button at the bottom of the page to add the completed form. You can add comments at each stage of the application.

Step 4

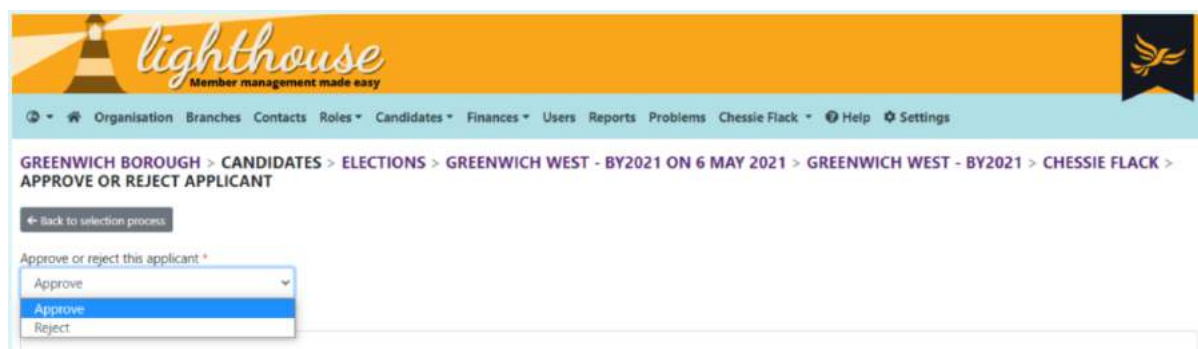
This will direct you back to the applicant page. You will be able to see the progress of the applicant in the bar across the top.

Click 'Continue' to add whether the application has been approved or rejected.



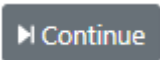
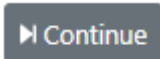
Step 5

Use the drop-down menu to indicate whether the applicant has been approved or rejected. If the applicant has been rejected, state why in the comments box. Please be aware that comments may be made public in response to a subject access request.

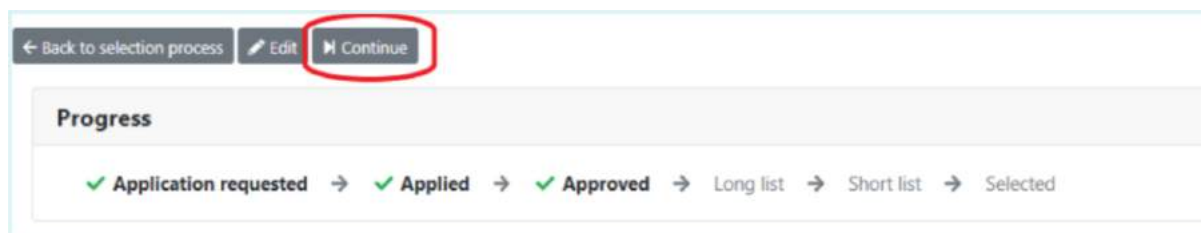


Click 'Continue' to go back to the applicant page.

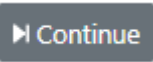
Step 6

If the applicant has been approved, you will then be able to add the applicant to the long list, by clicking the 'continue'  action button. At this stage you can add any useful comments on the applicant. Click the 'continue'  action button again to add the applicant to the long list and go back to the applicant page.

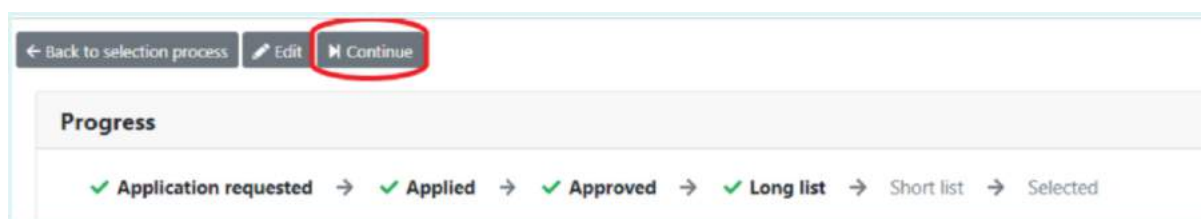
Lighthouse Guide 9: Managing Selections



Step 7

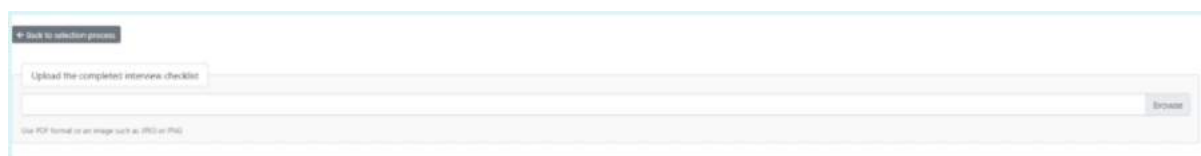
Once the applicant has made it to the long listing stage, they will have an interview conducted by the short-listing committee. If the applicant is successful in this interview click the 'continue'  action button on the applicant page.

If the candidate is not successful at the interview stage, leave the candidate as they are and do not click continue.



Step 8

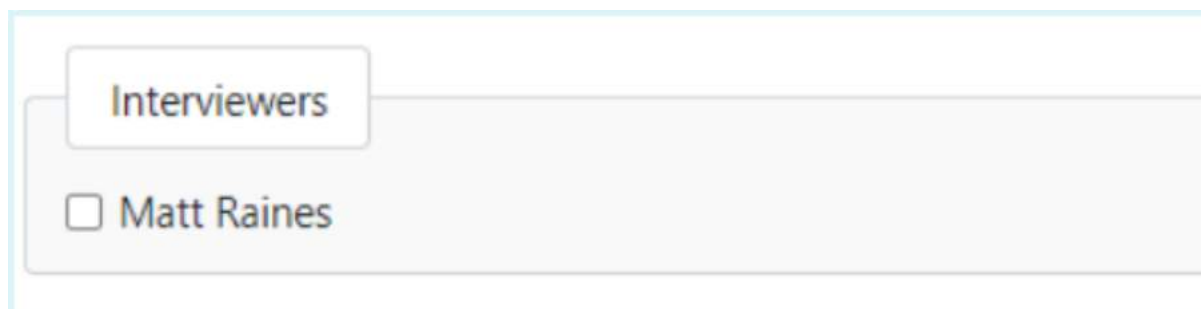
Upload a PDF of the completed interview checklist, so you can see if the applicant has been successful and any useful notes on the checklist.



Step 9

Select which members of the short-listing committee are on the interview panel. Only members of the short-listing committee should be interviewers.

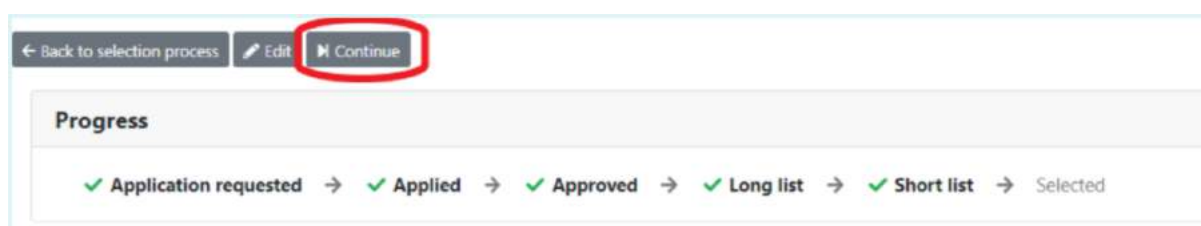
Lighthouse Guide 9: Managing Selections



Select 'Continue' if the applicant passed the short-listing interview, to add them to the shortlist.

Step 10

Once you have your list of short-listed applicants agreed with the Returning Officer and listed here, your RO will be able to open the selection to members to vote. When this has been completed, a winner has been declared, and any appeals are over, click 'continue' on the successful applicant.



Step 11

You will be directed to the page to confirm this applicant has been selected. Here you can add any comment about the successful applicant. Once you click the 'continue'

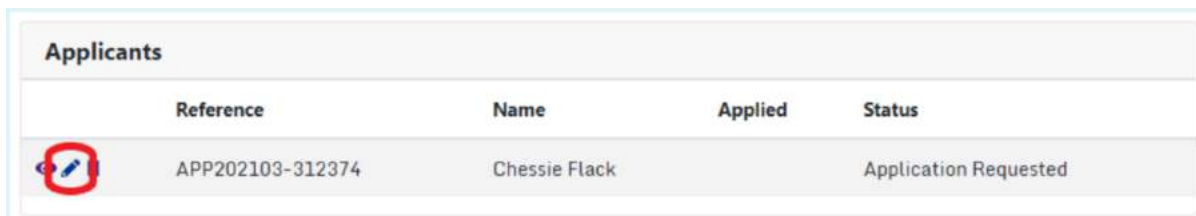
 action button here, this applicant will become the selected Candidate.




Lighthouse Guide 9: Managing Selections

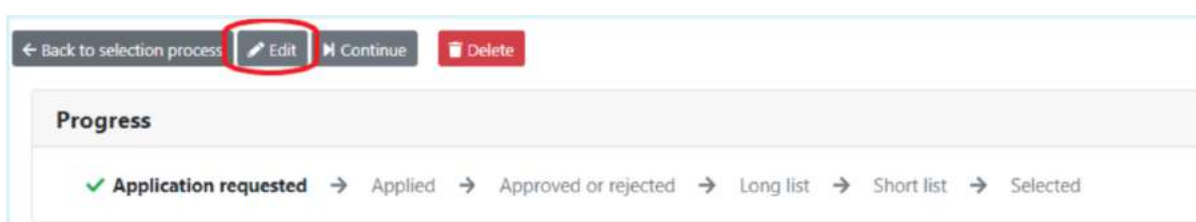
Step 12


If you make a mistake at any point, you can edit the applicant's information by clicking the pencil icon next to their name on the selection page.



	Reference	Name	Applied	Status
	APP202103-312374	Chessie Flack		Application Requested

Alternatively, you can click 'Edit' on the applicant's page.



← Back to selection process **Edit** ▶ Continue 

Progress

✓ Application requested → Applied → Approved or rejected → Long list → Short list → Selected

Downloading a selection list

In addition to managing selection processes, Lighthouse can generate a list of members eligible to vote in a selection for you.

This list is generated automatically if the "Membership List" field on a selection process has been populated.

Step 1

Click on Candidates and then Elections (you can also access this via Electoral Areas)

Step 2

Locate the election or electoral area that you need a selection list for.

Step 3

Either create a selection process, [as outlined here](#), or open an existing one.

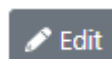
Lighthouse Guide 9: Managing Selections

Step 4

Check to see if the membership list field has been set. If it has, check to see that it is in the future. If it is in the past, then the selection list has already been generated and you'll need to set up a new selection process

Step 5 (optional)

If the membership list field has not been set, click the edit action button



Step 6

Wait until the day after you set the membership list to be generated and then re-open the selection process, following steps 1-3 of this guide.

Step 7

Click on the "download ballot list" action button.



Step 8

Select what contact details you want included in the list and then click download



Step 9

Copy the password for the downloaded file and use that password to extract it on your computer.

Please remember to always practice download, use, delete with any data downloaded from party systems.

Selection lists can be re-downloaded for 45 days after the date the list was generated. After this the list will expire and cannot be downloaded again.

Lighthouse Guide 9: Managing Selections

Add an agent

Once a candidate has been selected you can then input who their agent is. This will allow the HQ team to provide support and advice to agents during the election period as well as make sure they are thanked after the elections.

Step 1

Click on Candidates and then Elections (you can also access this via Electoral Areas)

Step 2

Either use the list view or the search bar to locate the area you're adding an agent for

FEDERAL PARTY > CANDIDATES > ELECTIONS

+ Add by-election Filter Show 20

Type	Name	Constituency type	Vacancies	Nominations close	Date	Spending return due		
<input type="checkbox"/>	By-Election	Abbey Wood	BY2021	Council Ward	1	31 Mar 2021	6 May 2021	16 Jun 2021

Step 3

Click on the eye icon on the far left of the election you wish to add an agent for.

Step 4

Click the "Add Agent" action button

Step 5

Search for the name of your agent in the box provided. Only members will display as only members can be agents.

Step 6

Click save

Your agent is now recorded! If you need to change the agent at any point, just come back to the election and click the "Replace Agent" button. Only one person can be appointed as an agent at any one time.

Lighthouse Guide 9: Managing Selections

Add a selected candidate

Step 1

Click on Candidates and then Elections (you can also access this via Electoral Areas)

Step 2

Either use the list view or the search bar to locate the area you're adding a candidate for. Please note, you'll only be able to add selected candidates for Council Elections - Parliamentary, Mayoral and PCC selections shouldn't be editable apart from adding agents.

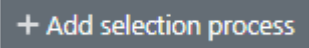


Type	Name	Constituency type	Vacancies	Selected	Nominations close
Scheduled	Edinburgh East	GE2024 Westminster Constituency	1	0	3 Apr 2024
Scheduled	Edinburgh North and Leith	GE2024 Westminster Constituency	1	0	3 Apr 2024

Step 3

Click on the eye icon on the far left of the election you wish to add a candidate for.

Step 4

Click the "Add Selection Process"  action button - don't worry, we won't have to go through the full process to add your already selected candidate.



NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > LEITH - BY2021 ON 19 MAR 2021					

Lighthouse Guide 9: Managing Selections

Step 5

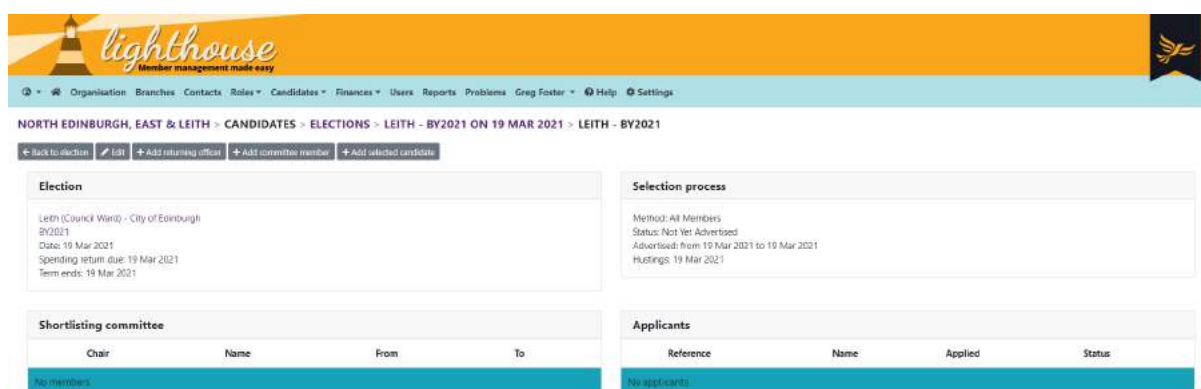
Select the “No selection data recorded” selection type and leave the type as “All Members” - this allows you to bypass the full process. None of the other fields are required so can be left blank. Once you’ve done that hit save, it’s at the bottom right.



The screenshot shows the Lighthouse software interface. At the top, there is a navigation menu with items like Organisation, Branches, Contacts, Roles, Candidates, Finances, Users, Reports, Problems, Greg Foster, Help, and Settings. Below the navigation, the breadcrumb trail reads: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > LEITH - BY2021 ON 19 MAR 2021 > NEW SELECTION PROCESS. A button labeled '← Back to election' is visible. The 'Type' dropdown menu is set to 'No selection data recorded'. The 'Method' field is currently blank.

Step 6

Now you’ve got a selection process, you’ll see this screen. Click “Add Selected Candidate”



The screenshot shows the Lighthouse software interface for a specific election process. The breadcrumb trail is: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > LEITH - BY2021 ON 19 MAR 2021 > LEITH - BY2021. There are four main sections: 1. 'Election' details: Leith (Council Ward) - City of Edinburgh, 9/2021, Date: 19 Mar 2021, Spending return due: 19 Mar 2021, Term ends: 19 Mar 2021. 2. 'Selection process' details: Method: All Members, Status: Not Yet Advertised, Advertised: from 19 Mar 2021 to 19 Mar 2021, Hufings: 19 Mar 2021. 3. 'Shortlisting committee' table with columns: Chair, Name, From, To. It shows 'No members'. 4. 'Applicants' table with columns: Reference, Name, Applied, Status. It shows 'No applicants'.

Step 7

Enter the name of your candidate in the top box. Candidates must be members to be added as a selected candidate. You can put the date they were originally applied/selected in as the date applied, or leave it as today. You can also leave comments if you need to. Hit save when you’re done.

Lighthouse Guide 9: Managing Selections

The screenshot shows the 'NEW SELECTED CANDIDATE' form in the Lighthouse system. The breadcrumb trail is: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > LEITH - BY2021 ON 19 MAR 2021 > LEITH - BY2021 > NEW SELECTED CANDIDATE. The form includes a 'Member *' field with a search prompt, a 'Date applied *' dropdown set to '19/03/2021', and a 'Comments' text area. A 'Cancel' button and a 'Save' button are at the bottom right.

And that's it! You now have candidates and agents recorded on Lighthouse. Just repeat the process for each area you've selected for and you'll be all done!

Add a Councillor

Within Lighthouse it's possible to record who your councillors are. These details are then used to power parts of public websites and can be shared with ALDC, so that Councillors can get the help and support they need to make a real difference to their communities.

Step 1

Within Lighthouse, navigate to candidates → electoral areas.

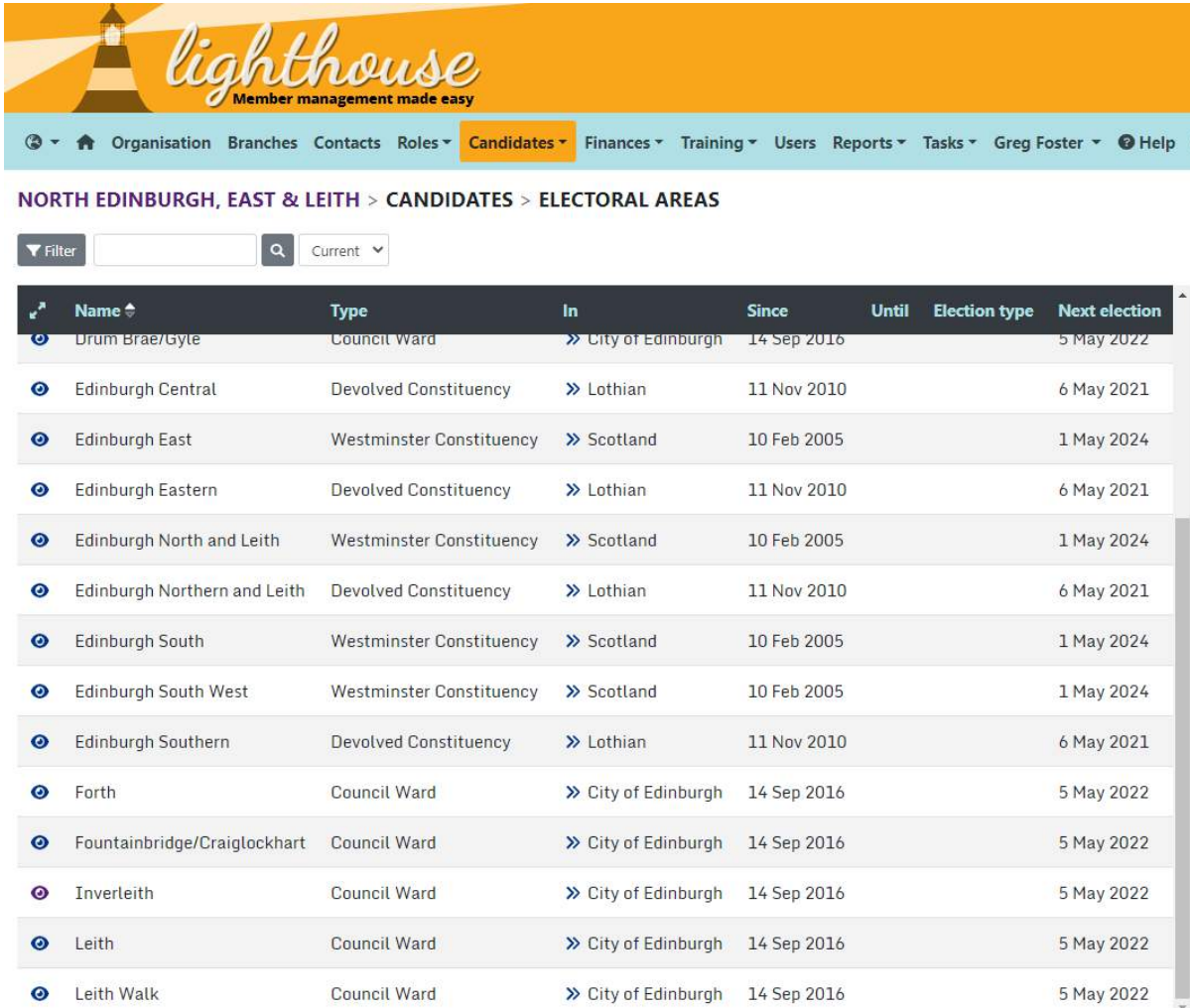
The screenshot shows the 'ELECTORAL AREAS' page in the Lighthouse system. The breadcrumb trail is: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTORAL AREAS. The page has a search filter and a table of electoral areas.

Name	Type	Since	Until	Election type	Next election
Almond	Council Ward	14 Sep 2016			5 May 2022
City Centre	Council Ward	14 Sep 2016			5 May 2022
City of Edinburgh	Council	1 Jun 2002			

Lighthouse Guide 9: Managing Selections

Step 2

Use either search, filter or simply look at the list of electoral areas in your local party to locate the electoral area your councillor is elected to represent. In this case, we're picking Edinburgh's Inverleith ward.



The screenshot shows the Lighthouse software interface. At the top, there is a navigation bar with the Lighthouse logo and the tagline "Member management made easy". Below the navigation bar, the breadcrumb trail reads "NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTORAL AREAS". A search and filter section is visible, with a "Filter" button and a search input field. The main content is a table of electoral areas.

Name	Type	In	Since	Until	Election type	Next election
Drum Brae/Gyle	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022
Edinburgh Central	Devolved Constituency	» Lothian	11 Nov 2010			6 May 2021
Edinburgh East	Westminster Constituency	» Scotland	10 Feb 2005			1 May 2024
Edinburgh Eastern	Devolved Constituency	» Lothian	11 Nov 2010			6 May 2021
Edinburgh North and Leith	Westminster Constituency	» Scotland	10 Feb 2005			1 May 2024
Edinburgh Northern and Leith	Devolved Constituency	» Lothian	11 Nov 2010			6 May 2021
Edinburgh South	Westminster Constituency	» Scotland	10 Feb 2005			1 May 2024
Edinburgh South West	Westminster Constituency	» Scotland	10 Feb 2005			1 May 2024
Edinburgh Southern	Devolved Constituency	» Lothian	11 Nov 2010			6 May 2021
Forth	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022
Fountainbridge/Craiglockhart	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022
Inverleith	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022
Leith	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022
Leith Walk	Council Ward	» City of Edinburgh	14 Sep 2016			5 May 2022

Step 3

If you're adding a Councillor who was elected in the past, you may need to create an election, [using the process outlined here](#). You can do this quickly from the Electoral Area record using the "Add Election" button.

HQ creates upcoming scheduled elections for you, so it's only for historic elections held in 2019 or earlier that we need you to complete this step.

Lighthouse Guide 9: Managing Selections

If you don't need to create a new election, you simply need to click on the correct election listed in the "Elections" information panel visible in the bottom right, as shown on the screenshot below.

The screenshot shows the Lighthouse interface for managing elections. At the top, the breadcrumb navigation reads: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTORAL AREAS > CITY OF EDINBURGH > INVERLEITH. Below this, there are three buttons: 'Back to list', 'Add election', and 'Record problem'. The main content area is split into two panels. The left panel, titled 'Map of Inverleith Council Ward', shows a map of the ward with various streets and landmarks labeled. The right panel, titled 'Electoral Area', contains the following information: Inverleith, Area Type: Council Ward, ONS Code: S13002923, Parent: City of Edinburgh (Council), and In use: 14 Sep 2016. Below this, the 'Elections' panel shows a single entry: Inverleith - COUNCIL2022 on 5 May 2022.

Step 4 (optional)

Input the details of your election. You are required to indicate what type of election it is (this would be scheduled for a councillor elected on a regular cycle and by-election for one elected at a by-election) on what date the election was held, how many vacancies there are for the ward.

We also recommend entering the date the term ends and the electorate, turnout and spoilt ballots.


Once you've entered your details, press enter.

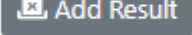
The screenshot shows the 'NEW' election form in the Lighthouse interface. The breadcrumb navigation reads: NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > NEW. The form has several fields: 'Type' (dropdown menu set to 'Scheduled'), 'Election date' (text input field with '04/05/2017' and a calendar icon), 'Constituency or electoral area' (text input field with 'Inverleith'), 'Name' (text input field with 'Inverleith - 2017'), 'Number of vacancies' (text input field with '4'), 'Nominations close' (text input field with 'dd/mm/yyyy'), 'Spending return due' (text input field with 'dd/mm/yyyy'), 'Term ends' (text input field with '05/05/2022'), 'Electorate' (text input field with '24275'), 'Turnout' (text input field with '13567'), and 'Ballots spoilt' (text input field with '147'). There are also 'Set to today / yesterday' links for the date fields. At the bottom right, there are three buttons: 'Cancel', 'Save & add another', and 'Save'.

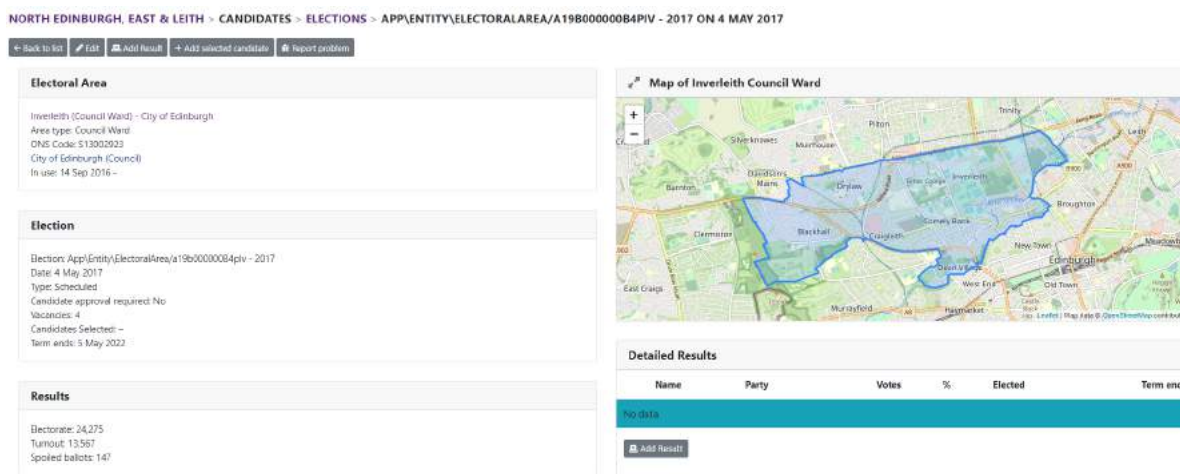
Note: If the election already exists, you may want to edit it to add the election record electorate, turnout and spoilt ballots, if you're intending to input full election results.

Lighthouse Guide 9: Managing Selections

Step 5

Now we have our election set up, we'll be redirected to the elections page and a filtered list of elections in our electoral area. After we click on the eye link , we'll be taken to the Election record page where we can add our Councillor.

To do this, we click the "Add Result" action button , in the election record.



The screenshot shows the 'Election record' page for the Inverleith Council Ward. The page is titled 'NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > APP\ENTITY\ELECTORALAREA/A19b0000084PIV - 2017 ON 4 MAY 2017'. It features a navigation bar with 'Back to list', 'Add Result', '+ Add selected candidates', and 'Report problem' buttons. The main content is divided into three sections: 'Electoral Area', 'Election', and 'Results'. The 'Electoral Area' section shows 'Inverleith (Council Ward) - City of Edinburgh' with details like 'Area type: Council Ward', 'ONS Code: S13002023', and 'City of Edinburgh (Council)'. The 'Election' section shows 'Election: App\Entity\Electoralea/a19b0000084piv - 2017', 'Date: 4 May 2017', 'Type: Scheduled', 'Candidate approval required: No', 'Nominations: 4', 'Candidates Selected: -', and 'Term ends: 5 May 2022'. The 'Results' section shows 'Electorate: 24,275', 'Turnout: 13,567', and 'Spoiled ballots: 147'. To the right, there is a 'Map of Inverleith Council Ward' showing the ward's boundaries. Below the map is a 'Detailed Results' table with columns for 'Name', 'Party', 'Votes', '%', 'Elected', and 'Term ends'. The table currently shows 'No data' and an 'Add Result!' button.

This can also be done within the "Detailed Results" information panel, in the bottom right of the screen.

Step 6

Next, you'll see the result entry screen. This allows you to input the details of the councillor.

The first thing to do is to search for your candidate's name, in the "Liberal Democrat Candidate" field. This works the same way as it does when searching for a donor or a person holding a party role.

You then have the option to input a different name, if they were elected under a different name to their membership and indicate if this was a paper candidate, or was elected.

You can then also input the number of votes they got (this is optional) and the date on which their term ends (this is required).

Lighthouse Guide 9: Managing Selections

The screenshot shows a web form for managing a councillor's selection. At the top left, there is a button labeled "← back to election". The form contains several fields: "Party" with a dropdown menu showing "Liberal Democrat"; "Liberal Democrat candidate" with a text input field containing "Hal Oslor" and a close button (X); "First name" with a text input field containing "Hal"; "Last name" with a text input field containing "Oslor"; "is paper" with an unchecked checkbox; "Notes" with a text area containing "225"; "Elected" with a checked checkbox; and "Date term ends" with a date picker showing "05/05/2022". There are also small instructional text blocks for the "Party" and "Date term ends" fields.

Step 7

Lastly, you need to input the public contact details for this Councillor. These details are used by HQ to generate website profiles on local and national sites running on [Fleet](#) as well as populating returns on [In Your Area](#).

These details include:

- Public address
- Public website
- Public email
- Public phone
- Public Facebook
- Public Twitter
- Public Instagram



Please bear in mind that these details will be published, so it's important to check that a Councillor is happy for you to do this before entering information. Any details that are blank won't be returned on a website.

When you're done, click save.

Step 8

And that's us complete! You'll now see Hal, our elected Councillor showing in the "Detailed Results information panel.

Lighthouse Guide 9: Managing Selections

Detailed Results						
	Name	Party	Votes	%	Elected	Term ends
	Ostler, Hal	Liberal Democrat	2251	16.77	✓	5 May 2022
						

Additionally, if you navigate to the Roles → Electoral sub-tab, you'll see what Hal now has a Councillor role on the system:

NORTH EDINBURGH, EAST & LEITH > ROLES > ELECTORAL

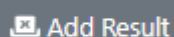
    

Reference	Position	Election	Constituency type	Holder
MPR00258907	Councillor	Inverleith	App\Entity\ElectoralArea/a19b000000B4pIv - 2017	Council Ward >> Hal Ostler

Add an election result

In addition to adding Councillors, Lighthouse allows you to record full election results. In the future, we're planning to expand this to allow useful features, like graphs of election results over time, automatically generating a suggested facing for 4S target pools and other useful additions, but for the moment, it simply gives you an easy way to record election results in a central location.

The process for this is broadly the same as [Adding a Councillor](#) and we pick up from step 5 of that process, where we are once again clicking the "Add Result"



action button, in the election record.

Step 1

Change the Party field to a party other than Liberal Democrat on the drop-down menu. Once this is done, you'll see that the available options for data entry reduce!

Lighthouse Guide 9: Managing Selections

NORTH EDINBURGH, EAST & LEITH > CANDIDATES > ELECTIONS > APP\ENTITY\ELECTORALAREA\A19B000000B4PIV - 2017 ON 4 MAY 2017 > NEW CANDIDATE

[← Back to details](#)

Party *
SNP

First name
Gavin
Add a first name for non-Lib Dem candidates, or where this is different from the contact name

Is paper
Used to denote a "paper candidate"

Votes
2572

Last name
Barrie
Add a first name for non-Lib Dem candidates, or where this is different from the contact name

Elected

Date term ends *
05/05/2022
Set to: today / yesterday

[Cancel](#) [Save](#)

You now need to enter the opposition candidate's name. You should also enter whether they were elected or not and how many votes they got. Click save when you're done.

Step 2




You'll now be returned to the elections screen and again, you'll see the detailed results info panel appear and have updated with the new result you entered.


Detailed Results						
	Name	Party	Votes	%	Elected	Term ends
	Barrie, Gavin	SNP	2572	19.17	✓	5 May 2022
	Ostler, Hal	Liberal Democrat	2251	16.77	✓	5 May 2022

[Add Result](#)

You now simply need to repeat this until all of the candidates have been entered.

Lighthouse Guide 9: Managing Selections

Detailed Results						
	Name	Party	Votes	%	Elected	Term ends
	Mitchell, Max	Conservative	2685	20.01	✓	5 May 2022
	Barrie, Gavin	SNP	2572	19.17	✓	5 May 2022
	Whyte, Iain	Conservative	2323	17.31	✓	5 May 2022
	Osler, Hal	Liberal Democrat	2251	16.77	✓	5 May 2022
	Dalglish, James	Labour	1678	12.50	✗	
	Bagshaw, Nigel	Green	1669	12.44	✗	
	Woolnough, Tina	Independent	357	2.66	✗	
	Laird, Tom	Libertarian	32	0.24	✗	

 Add Result

What to read next

The next section in the manual, is [Guide 10 - Using actions](#).

Related Guides & Geek Sheets

Related to this guide, are:

- Guide 6: Managing Member Roles
- Guide 8: Reporting Problems
- Geek Sheet 7: Finding candidates in Lighthouse
- Process Guide 2: Managing selections for ROs