Hart InterCivic, Election Solutions Group is committed to election integrity and customer satisfaction. All products, components, and services provided to our customer shall be safe, secure, and effective for their intended use, and they shall meet or exceed the quality and reliability levels expected by the marketplace.
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The Ballot Now application from the Hart InterCivic, Election Solutions Group's eSlate™ Electronic Voting System prints paper ballots on demand and then digitally images the voted ballots to extract the cast vote records (CVRs) for delivery to the eSlate Tally™ application.

Ballot Now derives information for printing paper ballots for the Election from one Election MBB that was created especially for paper ballots with the eSlate Electronic Voting System's Ballot Origination Software System™ application (BOSS).

The voted paper ballots are then scanned into Ballot Now and the CVRs are written back to the Ballot Now MBB. That Ballot Now MBB is then read into the eSlate Tally™ application for tallying the votes collected from the paper ballots.

The Ballot Now application lets you:

- Set up user names and passwords
- Read ballot styles from an Election's Ballot Now MBB
- Print ballot proofs for the Election
- Print TEST, SAMPLE, and ELECTION paper ballots for the Election
- Scan voted TEST and ELECTION paper ballots for the Election
- Resolve undervoted, overvoted, and/or write-in contests
- Record the Election's CVRs to the Ballot Now MBB
- Print Ballot Now reports for the Election

The Ballot Now application window displays Public and Private counters.

This system does not:

- Support maintenance of voter registration records
- Print ballot envelopes or labels
- Manage ballot return envelopes
System Architecture

Figure 1  System architecture for Ballot Now.
Making Selections

Some suggestions for how to navigate in the Ballot Now application are provided in this section. You will often need to use the mouse to move to an item in a Ballot Now window, then select, or highlight, the item so that you can perform a command on that item.

The instructions in this manual assume you are using a right-handed mouse.

Steps for: Clicking the mouse button

✓ When the instructions tell you to “click,” press the left mouse button once.

◆ To click a button such as [Enter], move the mouse pointer over the button and then press the left mouse button once.

◆ To select a field in a window so that it is highlighted (as shown in Figure 2), move the mouse pointer over the field, then press the left mouse button once.

Figure 2 Selected (highlighted) item in a window.
Steps for: Selecting from a list box

When the instructions tell you to select from a list box as shown in Figure 3:

- Press and hold the left mouse button down, drag to the item in the list so that it is highlighted, then release the mouse button.

![Figure 3 Selected item in a list box.](image)

Steps for: Selecting a check box

Place a check mark in a check box in a Ballot Now window to include that feature. Leave the check box empty to exclude a feature.

- To include a feature that has a check box, as shown for all of the check boxes in Figure 4:
  - Click inside the check box to place a check mark in the check box.
  - When you click [ ] or [ ] in the window, the checked feature will be included.

![Figure 4 Ballot Stub window showing check boxes checked.](image)
Sequential Steps for Printing Ballots

An overview of the recommended order for performing the procedures to print paper ballots for an Election in Ballot Now and relevant cross-references to the instructions in this manual is given below.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Cross-Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Insert the Ballot Now copy of the Election MBB into the PCMCIA drive in the computer and open the Election for that MBB.</td>
<td>Opening an Election to work with on page 20</td>
</tr>
<tr>
<td>3. Print Ballot Proofs of each ballot style.</td>
<td>Printing Ballot Proofs of each Ballot Style in the Election on page 36</td>
</tr>
<tr>
<td>4. Select the precinct ballot and number of copies you want to print. a. Print TEST ballots for the precinct. b. Print SAMPLE ballots for the precinct. c. Print ELECTION ballots for the precinct.</td>
<td>Selecting a Precinct's Ballot to Print on page 38 Printing a precinct's TEST ballots on page 43 Printing a precinct's SAMPLE ballots on page 44 Printing a precinct's ELECTION ballots on page 45</td>
</tr>
</tbody>
</table>

 Sequential Steps for Scanning and Resolving Voted Ballots

An overview of the recommended order for performing the procedures to scan and resolve voted ballots for an Election in Ballot Now, and relevant cross-references to the instructions in this manual is given below.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Cross-Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Insert the Ballot Now copy of the Election MBB into the PCMCIA drive in the computer and open the Election for that MBB.</td>
<td>Opening an Election to work with on page 20</td>
</tr>
<tr>
<td>2. Define write-ins.</td>
<td>Creating the List of Certified Write-In Names and Aliases on page 48</td>
</tr>
<tr>
<td>3. Set-up the scanner.</td>
<td>Setting program options for the scanner on page 56</td>
</tr>
<tr>
<td>4. Scan the voted ballots. a. Group voted ballots into batches. b. Load the pages into the scanner. c. Start the scanner.</td>
<td>Scanning a Batch of Ballots on page 59 Grouping ballots into batches on page 57 Loading pages in the scanner on page 58 Starting the scanner to scan the batch of ballots on page 60</td>
</tr>
<tr>
<td>5. Resolve unresolved ballots. a. Resolve overvotes and undervotes. b. Resolve write-ins.</td>
<td>Resolving Unresolved Ballots on page 69 Resolving overvoted or undervoted contest(s) on page 72 Resolving write-in votes on page 74</td>
</tr>
<tr>
<td>6. Save CVRs to the MBB.</td>
<td>Saving Cast Ballots to the MBB on page 85</td>
</tr>
<tr>
<td>7. Close the Election.</td>
<td>Changing an Election's Status to Closed on page 122</td>
</tr>
</tbody>
</table>
Documentation Roadmap

Manuals for the eSlate™ Electronic Voting System software and equipment from Hart InterCivic, Election Solutions Group include the following:

**Ballot Now™ Operations Manual 6000-067 (this book)**
This manual describes how to use the Ballot Now™ software application to print blank paper ballots from a BOSS Election database, scan and record votes marked on paper ballots, and write the cast vote records to an Election MBB (Mobile Ballot Box™) for counting votes in the eSlate Tally™ application software.

**eSlate™ Ballot Origination Software System™ Operations Manual 6000-019**
This manual describes how to use the Ballot Origination Software System™ software application, referred to as BOSS, to create an Election database from which you can create MBBS for use with the eSlate Electronic Voting System.

**eSlate™ Precinct Voting System Election Day Manual 6000-053 and 6000-109**
This manual describes how to set up and use the eSlate™ Precinct Voting System (PVS) equipment in a polling place on Election Day.

**eSlate™ Precinct Voting System Early Voting Manual 6000-069 and 6000-108**
This manual describes how to set up and use the PVS equipment in Early Voting polling places.

**eSlate™ Precinct Voting System DAU 5000 Voting Unit Setup Manual 6000-057**
This manual describes how to set up and use the DAU 5000™ voting units.

**eSlate™ Tally™ System Operations Manual 6000-049**
This manual describes how to use the Tally™ application software to read and tally the votes on MBBS that were used during an Election.

**eSlate™ Electronic Voting System Product Description 6000-060**
This manual describes how the various software and equipment components of the eSlate Electronic Voting System are used to run an Election.
Chapter 1

Getting Started

Main Topics

- Starting the Ballot Now Application on page 15.
  - Opening the Ballot Now window on page 16.
  - Logging In to Ballot Now on page 17.
- Ballot Now window on page 17.
- User Privileges on page 18.

The Ballot Now application is installed and maintained by Hart InterCivic Election Solutions Group personnel.

Starting the Ballot Now Application

Administrators and Operators log in to the Ballot Now application by typing a User ID (username) and password in the Ballot Now Login window.

- It is recommended that the user currently logged in:
  - stay at the computer while running the Ballot Now application
  - exit the Ballot Now application if they step away from the system

Different privileges are assigned to Administrators and Operators (see User Privileges on page 18). If you do not know your User ID and/or password, contact your System Administrator.
Steps for: Opening the Ballot Now window

To start the Ballot Now application:

1. Click the Start button on the Windows task bar.

2. On the desktop, double-click the Ballot Now icon,

   —OR—

   From the Start menu, choose Programs-->Hart InterCivic-->Ballot Now.

The Ballot Now window appears (see Figure 1-1).

Figure 1-1 Ballot Now window with most features disabled because no user is logged in yet.
Steps for: Logging in to Ballot Now

1. From the Admin menu, choose Login (see Figure 1-2). The Ballot Now Login window appears (see Figure 1-3).

2. In the Ballot Now Login window's User field, type your User ID.
   
   NOTE: The User ID and password are case-sensitive, so type uppercase and lowercase letters exactly.

3. In the Password field, type your password.

4. Click login.

   The features accessible with your User ID and password are now enabled in the Ballot Now window.

Ballot Now window

After login, the Election menu in the Ballot Now window is available to all users and the Administrative features in the Admin menu are enabled for users with Administrator privileges (see Figure 1-1 on page 16). The remaining menus become enabled after an Election is selected from the Election window (see Election window on page 20 and Figure 2-5 on page 22).

To work with an Election database, open the Election as described in Opening an Election to work with on page 20.
User Privileges

Users are assigned either Administrator or Operator privileges for using the features and functions in the Ballot Now application by an Administrator in the Add User window (see Add User Task on page 90).

Table 1-1 shows which types of users have privileges to use the features and functions in the Ballot Now application.

Table 1-1 User privileges for Ballot Now features and functions.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Operator</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Election</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Close Election</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Delete Election</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Resolve Writeins</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Resolve Unresolved Ballots</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Write cast ballots to MBB</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Card Recovery</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Add/Delete User</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Print Ballots</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Print Reports</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Scan Ballots</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Notes about logins

✓ If you enter an invalid User ID or an invalid password in the Ballot Now Login window, the error message shown in Figure 1-4 appears.

1 Click ❌ in the error message dialog box.
2 In the login window, enter a valid User ID and a valid password.
3 Click Login in the Ballot Now Login window.

Figure 1-4 Incorrect Login dialog box.
Chapter 2  
Activating an Election

Main Topics

- Tasks that Require the MBB Installed, this page.
  - Opening an Election to work with on page 20.
  - Working with a New Election in Ballot Now on page 23.
  - Recovering if the Ballot Now Election MBB is lost on page 24.

Ballot Now gets the information for an Election from an MBB that was created for paper ballots with the Ballot Origination Software System (BOSS) application.

You can use either a Test MBB or an Election MBB in Ballot Now. The same information on an MBB is used to print the ballots for an Election and to define a digital scanning template for processing the ballots after they have been voted and returned to Election Headquarters.

The types of MBB you can use for printing the different categories of ballots are listed below.

- ballot proofs, use the Test MBB
- TEST ballots, use the Test MBB
- SAMPLE ballots, use the Test MBB or the Election MBB
- ELECTION ballots, use the Election MBB

In order to work with an Election in the Ballot Now application, you will install the MBB in the PC Card drive and then use the Select Election command in the Election menu (see Figure 2-1) to make that Election active in the Ballot Now session.

Tasks that Require the MBB Installed

The MBB must be installed in the PC Card drive when you open an Election in the Ballot Now application in order to perform the following tasks:

- Print ballots — Described in Chapter 3 Printing Ballots
- Scan ballots — Described in Chapter 5 Scanning Voted Ballots
- Record ballots — Described in Chapter 6 Resolving and Recording Scanned Ballots
- Save CVRs to MBB — Described in Chapter 6 Resolving and Recording Scanned Ballots
- Close an Election — Described in Chapter 9 Closing an Election
Opening an Election to work with

You will use the Select Election command in the Election menu to open the Election window where you can select the Election you want to work with in the Ballot Now application.

- Inserting the MBB is required if you will be scanning or recording information for an Election.
- No MBB is required for performing administrative functions or for viewing and printing reports.

Election window

To open the Election window:

1. Log in as described in Logging in to Ballot Now on page 17.
2. From the Election menu, select Select Election (see Figure 2-2). The Insert Card window appears (see Figure 2-3).
3. Insert the appropriate MBB into the PC Card drive:
   - Insert the Test MBB into the PC Card drive if you will be printing ballot proofs, TEST ballots, or SAMPLE ballots.
   - Insert the Election MBB into the PC Card drive if you will be printing SAMPLE ballots or ELECTION ballots.
   - Insert the Election MBB into the PC Card drive if you will need to write to the Election MBB.
4. Click [OK] in the Insert Card window. The Election window appears (see Figure 2-4).

Each Election available for opening in Ballot Now appears as a row in the Election window's table. The ▶ arrowhead points to the Election that is currently selected for opening.
The **Election** window table has the columns described in **Table 2-1**.

**Table 2-1 Election window columns.**

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>election selected</td>
<td>The ▶ arrowhead points to the Election that is currently selected for opening.</td>
</tr>
</tbody>
</table>
| Card | Yes displays in this column to indicate that the MBB for the Election listed in the remaining columns of that row is currently installed in the PC Card drive.  
No displays in this column when the Election's MBB is NOT currently installed in the PC Card drive. |
| Election Name | Displays the name of the Election. |
| Date | Displays the date of the Election. |
| Elect Id | Displays the Election identification code. |
| State | Displays the Ballot Now status of the Election.  
- **Opened** — Indicates the Election has been loaded into Ballot Now.  
- **Closed** — Indicates the Election has been closed in Ballot Now and no further data processing is allowed on that Election. |
| Mode | Displays which mode was used in the Ballot Origination Software System (BOSS) application to create the MBB:  
- **Test** — a Test MBB  
- **Election** — an Election MBB |

The **Election** window has the buttons described in **Table 2-2**.

**Table 2-2 Election window buttons.**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Click this button to open the Election highlighted in the Election window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click this button to close the Election window without opening an Election.</td>
</tr>
</tbody>
</table>
Steps for: Selecting an Election to work with

To open an Election:
1. Log in as described in Logging in to Ballot Now on page 17.
2. Open the Election window as described on page 20.
3. In the Election window, select the Election you want to open.
   NOTE: The ▶ arrowhead in the Election window's table points to the Election that is currently selected for opening.
4. Click ▶ in the Election window.
   • The Election name now appears in the title of the Ballot Now window (see Figure 2-5).
   • All menus are available.
   • The Public and Private Counter values appear at the bottom of the Ballot Now window.
   • You can print, scan, or record ballots for the Election.

Figure 2-5 Ballot Now window with the name of the open Election in the title bar and all menus enabled.
Working with a New Election in Ballot Now

A new Election can be added to Ballot Now using an Election MBB that was created for paper ballots in the Ballot Origination Software System (BOSS) application.

- Choose one of the paper ballot format MBB's that was created for the Election with BOSS.
- In addition to the name of the Election, label that MBB with the words Ballot Now MBB.
- Always use that MBB with Ballot Now for the Election.
- Between Ballot Now sessions for the Election, store the MBB in a secure manner.

Steps for: Adding a New Election to Ballot Now

1. Log in as described in Logging in to Ballot Now on page 17.
2. From the Election menu, select Select Election (see Figure 2-2 on page 20). The Insert Card window appears (see Figure 2-6).
3. Insert the MBB for the new Election into the PC Card drive.
4. Click in the Insert Card window. The Add Election Confirmation window appears (see Figure 2-7).
5. Click in the Add Election Confirmation window.
   - Ballot Now reads the serial number of the Election MBB and creates a new Election database.
   - The Election MBB in the PC Card drive is now the only valid card for use with Ballot Now for that Election.
   - When the new Election's database has been created in Ballot Now, the Election window appears (see Figure 2-4 on page 20).
6. To begin working with the new Election in Ballot Now, in the Election window, select the new Election and click .
   - NOTE: The  arrowhead in the Election window's table points to the Election that is currently selected for opening.
7. Click in the Election window. The name of the new election now appears in the title of the Ballot Now window (see Figure 2-5 on page 22).
Recovering if the Ballot Now Election MBB is lost

When a paper ballot format MBB from an Election has been used to add the Election database to Ballot Now, that MBB is the only one that should be used for working with the Election in Ballot Now. However, in the event the Ballot Now Election MBB that was originally used to record votes for an Election is lost or damaged, an Administrator can recover the Ballot Now data by copying the Ballot Now Election data to a second paper ballot format MBB from the same BOSS database.

Steps for: Recovering Ballot Now data for an Election

1. Log in (with Administration privileges) as described in Logging in to Ballot Now on page 17.
2. From the Election menu, select Select Election (see Figure 2-2 on page 20). The Insert Card window appears (see Figure 2-8).
3. Insert the replacement MBB for the Election into the PC Card drive.
4. Click in the Insert Card window. The Card Configuration Error window appears (see Figure 2-9).
5. Click in the Card Configuration Error window. The Recovery Confirmation window appears (see Figure 2-10).
6 Click \(\text{OK}\) in the **Recovery Confirmation** window.
- The **Transferring Card Data** progress window appears.
- When the card recovery process is complete, the **Card Recovery Complete** window appears (see Figure 2-11).

![Card Recovery Complete window](image)

**Figure 2-11 Card Recovery Complete window.**

7 Click \(\text{OK}\) in the **Card Recovery Complete** window.
- The Ballot Now data for the Election is now on the replacement Election MBB.
- The Election MBB in the PC Card drive is now the only valid card for the Election.
8 Label that MBB with the words *Ballot Now MBB*.
- Always use that MBB with Ballot Now for the Election.
- Between sessions with Ballot Now for the Election, store the MBB in a secure manner.
Chapter 3

Printing Ballots

Main Topics

<table>
<thead>
<tr>
<th>Overview of preparing to print ballots on page 28.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview of printing ballot proofs on page 28.</td>
</tr>
<tr>
<td>Overview of printing ballots on page 28.</td>
</tr>
<tr>
<td>Pre-Printing Set Up on page 29.</td>
</tr>
<tr>
<td>◆ Setting program options for ballot printing on page 31.</td>
</tr>
<tr>
<td>◆ Setting options for ballot stubs on page 35.</td>
</tr>
<tr>
<td>Printing Ballot Proofs of each Ballot Style in the Election on page 36.</td>
</tr>
<tr>
<td>Selecting a Precinct's Ballot to Print on page 38.</td>
</tr>
<tr>
<td>Previewing Ballot Styles for a Precinct on page 41.</td>
</tr>
<tr>
<td>Printing a Precinct's Ballots on page 42.</td>
</tr>
<tr>
<td>◆ Printing a precinct's TEST ballots on page 43.</td>
</tr>
<tr>
<td>◆ Printing a precinct's SAMPLE ballots on page 44.</td>
</tr>
<tr>
<td>◆ Printing a precinct's ELECTION ballots on page 45.</td>
</tr>
</tbody>
</table>

All ballot page layout and print formatting for paper ballots is handled by the BOSS application. The information for printing all ballot styles for the Election is then transferred to Test or Election MBBs using BOSS and read into Ballot Now from the MBB.

If the Election created in BOSS used a second language, both languages will be printed on each ballot.

◆ You will use the Print Proofs command in the Print Ballots menu to print TEST and SAMPLE ballot proofs (see Figure 3-1).
◆ You will use the Print Ballots command in the Print Ballots menu to print TEST, SAMPLE and ELECTION ballots (see Figure 3-1).
Overview of preparing to print ballots

There are two preparation tasks to perform before you print ballot proofs of all ballot styles for all precincts, or print TEST, SAMPLE and ELECTION ballots for a precinct:

1. Install the appropriate MBB in the PC Card drive.
   - For printing ballot proofs, the Ballot Now application accesses the page layout information for all ballot styles in an Election from the Test MBB.
   - For printing TEST ballots, the Ballot Now application accesses the page layout information for all ballot styles in an Election from the Test MBB.
   - For printing SAMPLE ballots, the Ballot Now application accesses the page layout information for all ballot styles in an Election from the Test MBB or the Election MBB.
   - For printing ELECTION ballots, the Ballot Now application accesses the page layout information for all ballot styles in an Election from the Election MBB.

2. Set the preferences for printing as described in Pre-Printing Set Up on page 29.

Overview of printing ballot proofs

The Test MBB must be used to print one copy of each of the ballot styles in an Election (see Printing Ballot Proofs of each Ballot Style in the Election on page 36).

Overview of preparing to print one precinct’s ballots

There are two additional preparation tasks to perform before you print TEST, SAMPLE and ELECTION ballots for a precinct:

- Select the precinct to work with as described in Selecting a Precinct’s Ballot to Print on page 38.
- Preview the ballots you will print as described in Previewing Ballot Styles for a Precinct on page 41.

Overview of printing ballots

After the ballot printing preparation tasks have been performed, you can print ballots:

- Send TEST, SAMPLE or ELECTION ballots for a precinct to the system printer as described in Printing a Precinct’s Ballots on page 42.
- Send the ballot proofs to the system printer as described in Printing Ballot Proofs of each Ballot Style in the Election on page 36.
Pre-Printing Set Up

Before you print the ballot proofs, or TEST, SAMPLE or ELECTION ballots, you must:
- Load the correct paper into the printer (60 to 80 lb. paper with the dimensions that were selected in the BOSS application).
- Select the preferences for printing ballots in the Ballot Printing tab of the Program Options window (see Figure 3-3).

The preferences for printing ballots include the following items:
- Select Printer — for picking the printer that can print the ballots on the correct paper size
- Print Duplex Ballot — for printing both sides of the paper
- Include and Setup Ballot Stub — for printing a stub on the ballots
- Enable Ballot Serial Numbering — for including serial numbers on the ballots

Ballot Printing tab, Program Options window

The Ballot Printing tab of the Program Options window contains settings that will be applied to the printed ballots.

✔ To open the Ballot Printing tab of the Program Options window:
1. From the Election menu, select Preferences (see Figure 3-2).
   The Program Options window appears.
2. Click the Ballot Printing tab (see Figure 3-3).
The **Ballot Printing** tab of the **Program Options** window has the check boxes described in **Table 3-1**.

**Table 3-1  Program Options window Ballot Printing tab Ballot Identification check boxes.**

<table>
<thead>
<tr>
<th>Check Box</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballot Printing panel options</td>
<td></td>
</tr>
<tr>
<td>Print Duplex Ballot</td>
<td>When checked, causes the printer to print on both sides of the paper. <strong>NOTE:</strong> When you are ready to scan the voted ballots, if the ballots were printed on both sides of the paper you will need to set the preferences for scanning so that the scanner will scan duplex ballots as described in Pre-Scan Preparation on page 54.</td>
</tr>
<tr>
<td>Include Ballot Stub</td>
<td>When checked, a ballot stub will be printed on the ballot. <strong>NOTE:</strong> You must define the information you want included on the ballot stub in the Ballot Stub window as described in Ballot Stub window on page 33.</td>
</tr>
</tbody>
</table>

| Enable Ballot Serial Numbering | When checked, the **Serial Numbering** panel appears in the **Ballot Printing** tab. A unique serial number will be printed on each paper ballot and/or ballot stub. The starting serial number will be the number defined in the **Starting Serial Number** field of the Print Selection window (see Print Selection window on page 38). |

**Table 3-2  Program Options window Ballot Printing tab buttons.**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set Up Ballot Stub</strong></td>
<td>If you checked the <strong>Include Ballot Stub</strong> check box, click this button to open the Ballot Stub window where you can define the information for the ballot stub.</td>
</tr>
</tbody>
</table>
| **Select Printer**      | Click this button to open the **Print Setup** window and select:  
  - the printer  
  - options for the printer |
The **Program Options** window has the buttons described in Table 3-3. These buttons apply to all the tabs in the **Program Options** window.

**Table 3-3 Program Options window buttons.**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save]</td>
<td>Click this button to save changes made in any of the tabs in the <strong>Program Options</strong> window.</td>
</tr>
<tr>
<td>![Cancel]</td>
<td>Click this button to close the <strong>Program Options</strong> window without saving your changes.</td>
</tr>
</tbody>
</table>

**Steps for: Setting program options for ballot printing**

- To set the preferences for printing ballots:
  1. Open the **Program Options** window as described on page 29.
  2. Click the **Ballot Printing** tab in the **Program Options** window (see Figure 3-3 on page 29).
  3. Check or uncheck the **Enable Ballot Serial Numbering** check box (described on page 30).
    - If you check this box:
      - When the voted ballots are scanned, you can use the **Disallow Duplicate Ballots** feature of Ballot Now (Setting program options for the scanner on page 56).
      - The **Serial Numbering** panel appears in the **Ballot Printing** tab (see Figure 3-4).
        a. In the **Serial Numbering** panel of the **Ballot Printing** tab, select the option to use for printing serial numbers:
           - **Ballot Stub Only** — Prints the serial number on the ballot stub, but not on the ballot.
           - **Ballot Only** — Prints the serial number on the ballot, but not on the stub.
           - **Both** — Prints the serial number on both the ballot stub and on the ballot.
        b. Continue with Step 4.

**Figure 3-4 Ballot Printing tab in the Program Options window (Serial-numbers view).**
4 Check or uncheck the Print Duplex Ballot check box (described on page 30).
5 Check or uncheck the Include Ballot Stub check box (described on page 30).
6 Click Select Printer to open the Print Setup window (see Figure 3-5).

7 In the Printer panel, use the Name list box to select the printer.

NOTES:
- Do not change the fields in the Paper panel, because Ballot Now automatically selects the proper paper size based on information on the MBB.
- Do not change the orientation in the Orientation panel. Ballot Now prints in portrait format.
8 Click Select Printer to save your changes to the Print Setup window and close it.
9 If you checked the Include Ballot Stub check box, stop here and go to Steps for: Setting options for ballot stubs on page 35.
10 If you did not check the Include Ballot Stub check box, click Select Printer to save your changes to the Program Options window and close it.
11 Go to:
- Printing Ballot Proofs of each Ballot Style in the Election on page 36
  OR
- Selecting a Precinct's Ballot to Print on page 38.
Options for ballot stubs

There are two tasks to perform if the printed ballots need to have stubs:
- Check the Include Ballot Stub check box in the Ballot Printing tab of the Program Options window (described in Steps for: Setting program options for ballot printing above).
- Define the options for ballot stubs in the Ballot Stub window as described below.

Ballot Stub window

You can define the options for the stubs to be printed on ballots in the Ballot Stub window (see Figure 3-6).

The Ballot Stub window has the check boxes and fields described in Table 3-4.

<table>
<thead>
<tr>
<th>Check Box/Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stub Label check box</td>
<td>Click to place a check mark in the check box if you want a heading printed on the stub. Then type the heading in the field.</td>
</tr>
<tr>
<td>field</td>
<td>If the Stub Label check box is checked, type the text you want printed as a heading on the stub. For example: Absentee Ballot</td>
</tr>
<tr>
<td>Election check box</td>
<td>Click to place a check mark in the check box if you want the Election name printed on the stub.</td>
</tr>
<tr>
<td>field</td>
<td>The Election name is displayed here and will be printed on the stub if the Election check box is checked.</td>
</tr>
<tr>
<td>Election Date check box</td>
<td>Click to place a check mark in the check box if you want the Election date printed on the stub.</td>
</tr>
<tr>
<td>field</td>
<td>The Election date is displayed here and will be printed on the stub if the Election Date check box is checked.</td>
</tr>
</tbody>
</table>
Table 3-4  Ballot Stub window check boxes and fields. (Continued)

<table>
<thead>
<tr>
<th>Check Box/Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jurisdiction Name check box</td>
<td>Click to place a check mark in the check box if you want the name of the jurisdiction printed on the stub. The name of the jurisdiction is displayed here and will be printed on the stub if the Jurisdiction Name check box is checked.</td>
</tr>
<tr>
<td>Precinct</td>
<td>Click to place a check mark in the check box if you want the precinct name printed on the stub.</td>
</tr>
<tr>
<td>Signature Line check box</td>
<td>Click to place a check mark in the check box if you want places for a signature and date printed on the stub. Then type the signature line in the field. If the Signature check box is checked, type the text you want printed on the stub as places for a signature and date. For example: Signature Date</td>
</tr>
<tr>
<td>Stub Instructions check box</td>
<td>Click to place a check mark in the check box if you want instructions printed on the stub. Then type the instructions in the field. If the Stub Instructions check box is checked, type the text you want printed as instructions on the stub. For example: DO NOT REMOVE THIS STUB</td>
</tr>
</tbody>
</table>

The Ballot Stub window has the buttons described in Table 3-5.

Table 3-5  Ballot Stub window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Click this button to save changes made in any of the tabs in the Ballot Stub window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click this button to close the Ballot Stub window without saving your changes.</td>
</tr>
</tbody>
</table>

Chapter 3 Printing Ballots
Steps for: Setting options for ballot stubs

To define the options for stubs on the printed ballots:

1. Open the Program Options window as described on page 29.
2. Click the Ballot Printing tab in the Program Options window.
3. Place a check mark in the Include Ballot Stub check box.
4. Click 

The Ballot Stub window appears (see Figure 3-6 on page 33).
5. Check or uncheck the Stub Label check box (described on page 33).
6. Check or uncheck the Election check box (described on page 33).
7. Check or uncheck the Election Date check box (described on page 33).
8. Check or uncheck the Jurisdiction Name check box (described on page 34).
9. Check or uncheck the Precinct check box (described on page 34).
10. Check or uncheck the Signature Line check box (described on page 34).
11. Check or uncheck the Stub Instructions check box (described on this page).
12. In the Ballot Stub window, click 

   to save your changes to the Ballot Stub window and close it.
13. In the Program Options window, click 

   to save your changes to the Program Options window and close it.
14. Go to:

   • Printing Ballot Proofs of each Ballot Style in the Election on page 36

   — OR —

   • Selecting a Precinct's Ballot to Print on page 38.

NOTE: If you print ballot stubs, the printer must be loaded with paper that is 3" (three inches) longer than the ballot template. For example, if the ballot template is 8 1/2" x 11" the paper required to print that ballot with a stub is 8 1/2" x 14".
Printing Ballot Proofs of each Ballot Style in the Election

You can use the Print Proofs window (see Figure 3-9) to print one copy of each of the ballot styles in an Election. The ballot proofs can be printed:

- using a Test MBB
- as TEST or SAMPLE ballots

Since Ballot Now can only print proofs from a Test MBB, the Test MBB for the Election must be installed the PC Card drive.

Print Proofs window

The Print Proofs window lets you select which type of ballot proof you want to print:

- TEST ballots
- SAMPLE ballots

To open the Print Proofs window:

1. From the Print Ballots menu, select Print Proofs (see Figure 3-7).
   The Print Proofs printing confirmation dialog box appears (see Figure 3-8).

2. Click the button in the Print Proofs dialog box to confirm that you want to print ballot proofs for the Election.
   The Print Proofs window appears (see Figure 3-9).
The **Print Proofs** window has the options described in Table 3-6.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballot Type panel</td>
<td>Select the type of ballot proofs you want to print:</td>
</tr>
<tr>
<td>Test Ballot</td>
<td>• Select this option to print TEST proofs.</td>
</tr>
<tr>
<td>Sample Ballot</td>
<td>• Select this option to print SAMPLE proofs.</td>
</tr>
</tbody>
</table>

The **Print Proofs** window has the buttons described in Table 3-7.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>Click this button to send the ballot proofs to the printer.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click this button to close the <strong>Print Proofs</strong> window without sending ballot proofs to the printer.</td>
</tr>
</tbody>
</table>

**Steps for: Printing ballot proofs for an Election**

1. Insert the Test MBB into the PC Card drive.
2. Open the Election as described in Selecting an Election to work with on page 22.
3. Turn on the printer and load the correct paper.
4. Set the printing preferences as described in Setting program options for ballot printing on page 31.
5. Open the **Print Proofs** window as described on page 36.
6. In the **Ballot Type** panel of the **Print Proofs** window, select the type of ballot proofs you want to print (SAMPLE or TEST).
   **NOTE:** The serial number(s) for ballot proofs (if applicable) will automatically be printed on the proofs.
7. Click **OK** in the **Print Proofs** window.
   The ballot proofs are sent to the printer.
Selecting a Precinct's Ballot to Print

You will use the Print Selection window (see Figure 3-11) to:
- select the precinct's ballot
- select the type of ballot to print (TEST, SAMPLE, or ELECTION)
- enter the number of copies to print
- enter the beginning serial number if applicable
- click \[\text{Preview}\] to preview the ballot
- click \[\text{Print}\] to print the ballots

Print Selection window

The Print Selection window lets you select the precinct for which you want to print TEST, SAMPLE or ELECTION ballots.

✔ To open the Print Selection window:
- From the Print Ballots menu, select Print Ballots (see Figure 3-10). The Print Selection window appears with the name of the Election in the title bar (see Figure 3-11).

![Figure 3-10 Print Ballots menu.]

![Figure 3-11 Print Selection Election name window.]

The Print Selection window has the fields described in Table 3-8.

Table 3-8 Print Selection window fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Precinct Name</td>
<td>From the list box, select the precinct you want to work with. The number of pages in that precinct's ballot displays below the Precinct Name field.</td>
</tr>
<tr>
<td>Ballot pages for selected precinct: n</td>
<td>Displays the number of pages in the selected ballot.</td>
</tr>
<tr>
<td>Max pages for any ballot: n</td>
<td>Displays the maximum number of pages in any ballot in the Election.</td>
</tr>
</tbody>
</table>
Table 3-8 Print Selection window fields. (Continued)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of copies</td>
<td>Type the number of copies you want to print for the precinct selected in the Precinct Name field.</td>
</tr>
<tr>
<td>Starting Serial Number</td>
<td>Type the beginning serial number in the print batch. Each copy of the precinct's ballot will have a unique serial number.</td>
</tr>
</tbody>
</table>

**NOTE:** One of these fields is available when serial numbering was enabled in the Enable Ballot Serial Numbering and Serial Numbering fields of the Program Options window's Ballot Printing tab (see Setting program options for ballot printing on page 31).

**NOTES:**
- The first serial number for the first ballot ever printed from this Election defaults to the number “1.”
- A subsequent starting serial number must not have been used before for printing ballots from this Election.
- In the next printing session for the Election currently active, the serial number will automatically be incremented by one. After Election ballots have been printed with serial numbers, serial numbers cannot be disabled for that Election.

The Print Selection window has the options described in Table 3-9.

Table 3-9 Print Selection window options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballot Type panel</td>
<td></td>
</tr>
</tbody>
</table>
| Election Ballot         | Select this option to print official ballots for the Election.  
**NOTE:** ELECTION ballots can be printed from an Election MBB.                                                                                  |
| Sample Ballot           | Select this option to print same ballots for the Election. SAMPLE ballots will be printed with: "SAMPLE BALLOT" clearly marked on the pages.  
**NOTE:** SAMPLE ballots can be printed from either a Test MBB or an Election MBB.                                                             |
| Test Ballot             | Select this option to print test ballots for the Election. TEST ballots will be printed with "TEST BALLOT" clearly marked on the pages.  
**NOTE:** TEST ballots can be printed from a Test MBB.                                                                                          |

The Print Selection window has the buttons described in Table 3-10.

Table 3-10 Print Selection window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Click this button to send the ballots to the printer.</td>
</tr>
<tr>
<td>Preview</td>
<td>Click this button to open the Print Preview window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click this button to close the Print Selection window without saving changes.</td>
</tr>
</tbody>
</table>
Steps for: Selecting the precinct ballot you want to print

Each precinct in the Election has an assigned ballot style. To print the ballot(s) for a particular precinct, you simply select:

- the name of the precinct you want to work with
- ELECTION, SAMPLE, or TEST
  - ELECTION ballots can be printed from an Election MBB.
  - SAMPLE ballots can be printed from either a Test MBB or an Election MBB.
  - TEST ballots can be printed from a Test MBB.
- the number of copies you want to print
- the beginning serial number in the print batch (if applicable)

To select a ballot to work with:

1. Locate the appropriate MBB.
2. Insert the appropriate MBB into the PC Card drive:
   - Insert the Test MBB into the PC Card drive if you will be printing ballot proofs, SAMPLE ballots, or TEST ballots.
   - Insert the Election MBB into the PC Card drive if you will be printing SAMPLE ballots or ELECTION ballots.
3. Open the Election as described in Selecting an Election to work with on page 22.
4. From the Print Ballots menu, select Print Ballots (see Figure 3-10).
   - The Print Selection window appears (see Figure 3-11).
5. From the Precinct Name list box in the Print Selection window, select the precinct you want to work with.
   - The number of pages in that ballot displays below the Precinct Name field.
6. In the Ballot Type panel, select the type of ballot you want to preview or print (ELECTION, SAMPLE, or TEST).
7. In the Number of copies field in the Copies panel, type the number of copies you want to print.
8. In the Starting Serial Number field, type the beginning serial number for the print batch.
   - NOTE: The number you enter must be larger than the number displayed in the Starting Serial Number field of the Print Selection window when it was opened.

Now you can:

- Click to preview the ballot for the precinct (see Previewing Ballot Styles for a Precinct on page 41).
  --- AND/OR ---
- Print TEST, SAMPLE, or ELECTION ballots for the precinct (see Printing a Precinct's Ballots on page 42).

NOTE: If you print ballot stubs, the printer must be loaded with paper that is 3" (three inches) longer than the ballot template. For example, if the ballot template is 8 1/2" x 11" the paper required to print that ballot with a stub is 8 1/2" x 14".
Previewing Ballot Styles for a Precinct

Ballot styles for a precinct can be previewed before you print them.

**Steps for: Previewing the precinct’s ballot**

In the **Print Selection** window you must select the precinct whose ballot you want to preview.

1. To preview a ballot:
   1. Select the precinct and the type of ballot as described in Selecting the precinct ballot you want to print on page 40.
2. Click **Preview** in the **Print Selection** window.
   - The **Print Preview** window appears (see Figure 3-12).
   - If a bilingual ballot is present, then this ballot includes “Voto Ambos Lados” (Spanish for “Vote Both Sides”).
3. Review the ballot in the **Print Preview** window to verify it is the ballot you want to print.
   - Use the arrowhead buttons in the tool bar at the top of the **Print Preview** window to view all the pages in the ballot.
4. Close the **Print Preview** window by clicking **X** in the toolbar.

![Figure 3-12 Print Preview window.](image-url)
Printing a Precinct's Ballots

You can print TEST, SAMPLE, and ELECTION ballots from the ballot styles you retrieved from the MBB.

Go the respective descriptions for printing TEST, SAMPLE, or ELECTION ballots:
- Printing a precinct's TEST ballots on page 43
- Printing a precinct's SAMPLE ballots on page 44
- Printing a precinct's ELECTION ballots on page 45
Steps for: Printing a precinct's TEST ballots

TEST ballots can be printed from a Test MBB.
You can print multiple copies of TEST ballots. TEST ballots will be printed with:
- "TEST BALLOT" clearly marked on the page.

In the Program Options window (see Ballot Printing tab, Program Options window on page 29) you can set options to print TEST ballots with:
- A serial number and its bar code,
- A bar code that identifies the Election,
- A bar code that identifies the ballot printout as a TEST ballot.

✔ To print TEST ballots with the words TEST BALLOT on the page:
  1. Turn on the printer and load the correct paper.
  2. Set the printing preferences as described in Setting program options for ballot printing on page 31.
  3. Open the Print Selection window as described on page 38.
  4. In the Print Selection window, select the precinct, the number of copies, and the beginning serial number as described in Selecting the precinct ballot you want to print on page 40.
  5. In the Print Selection window, select Test Ballot.
  6. Click in the Print Selection window and review the ballot (described in Previewing the precinct’s ballot on page 41).
  7. In the Print Selection window, click .
     The TEST ballots are sent to the printer.
  8. If the printer jams during ballot printing:
     a. Remove the jammed documents from the printer.
     b. When the printer restarts, destroy any duplicate ballots that have printed. (Look at the ballot serial numbers.)
**Steps for: Printing a precinct's SAMPLE ballots**

SAMPLE ballots can be printed from either a Test MBB or an Election MBB. You can print multiple copies of SAMPLE ballots. SAMPLE ballots will be printed with:
- "SAMPLE BALLOT" clearly marked on the page.

In the Program Options window (see Ballot Printing tab, Program Options window on page 29) you can set options to print SAMPLE ballots with:
- A serial number and its bar code,
- A bar code that identifies the Election,
- A bar code that identifies the ballot printout as a SAMPLE ballot.

To print SAMPLE ballots with the words SAMPLE BALLOT on the page:
1. Turn on the printer and load the correct paper.
2. Set the printing preferences as described in Setting program options for ballot printing on page 31.
3. Open the Print Selection window as described on page 38.
4. In the Print Selection window, select the precinct, the number of copies, and the beginning serial number as described in Selecting the precinct ballot you want to print on page 40.
5. In the Print Selection window, select Sample Ballot.
6. Click [Preview] in the Print Selection window and review the ballot (described in Previewing the precinct's ballot on page 41).
7. In the Print Selection window, click [Print].
   The SAMPLE ballots are sent to the printer.
**Steps for: Printing a precinct's ELECTION ballots**

ELECTION ballots can be printed from an *Election* MBB.

You can print the number of ELECTION ballots required for the number of voters in a precinct. If serial numbering is enabled in the Program Options window, each ELECTION ballot will have a serial number so that a voted ELECTION ballot cannot be scanned more than once for counting.

In the Program Options window (see Ballot Printing tab, Program Options window on page 29) you can set options to print official ELECTION ballots with:

- A serial number and its bar code,
- A bar code that identifies the Election,
- A bar code that identifies the ballot printout as an ELECTION ballot.

To print ELECTION ballots:
1. Turn on the printer and load the correct paper.
2. Set the printing preferences as described in Setting program options for ballot printing on page 31.
3. Open the Print Selection window as described on page 38.
4. In the Print Selection window, select the precinct, the number of copies, and the beginning serial number as described in Selecting the precinct ballot you want to print on page 40.
5. In the Print Selection window, select Election Ballot.
6. Click [Print] in the Print Selection window and review the ballot (described in Previewing the precinct's ballot on page 41).
7. In the Print Selection window, click [Print].

The ELECTION ballots are sent to the printer.
Chapter 3 Printing Ballots

Printing a precinct's ELECTION ballots

FROM BLACK BOX VOTING DOCUMENT ARCHIVES
Chapter 4

Defining Certified Write-In Names and Aliases

Main Topics

Creating the List of Certified Write-In Names and Aliases on page 48.
- Defining certified write-in names and aliases on page 48.
- Deleting a write-in name or alias from the list on page 51.

Ballot Now handles both certified write-in candidate names and free-form write-in candidate names. When a write-in is detected on a scanned ballot, you will be able to use the Resolve Writein window to either select the candidate name from an approved list of write-ins or enter the free-form candidate name so that the write-in name will be recorded in the CVR as a legitimate vote (see Resolving write-in votes on page 74).

After an Election has been opened in the Election window:

- If the Election allows certified write-in candidate names, you will use the Enter Certified Writeins command in the Election menu (see Figure 4-1) to open the Add Writein Candidate window and create a list of the certified write-in candidate names and aliases that will be allowed for counting.

- If the Election allows free-form write-ins for candidates, you must enable free-form write-ins before you open the Resolve Ballot window to resolve write-ins on ballots (see Setting program options for free-form write-ins on page 68).
Creating the List of Certified Write-In Names and Aliases

Certified names and aliases of write-in candidates that will be allowed as votes in a contest in the Election are defined in the Add Write-in Candidate window.

Add Writein Candidate window

✓ To open the Add Writein Candidate window:
  1. Open the Election as described in Selecting an Election to work with on page 22.
  2. From the Election menu, select Enter Certified Writeins (see Figure 4-1).
     The Add Writein Candidate window appears (see Figure 4-2).

Steps for: Defining certified write-in names and aliases

1. Open the Add Writein Candidate window as described on page 48.
2. From the Select Contest list box, select the contest for which you want to add a write-in candidate name (see Figure 4-3).
   The name Uncertified automatically appears in the Select Contest field (see Figure 4-4 on page 49).

Figure 4-2 Add Writein Candidate window.

Figure 4-3 Select Contest list box in the Add Writein Candidate window.
Figure 4-4 Uncertified in the Authorized Writein Candidates list in the Add Writein Candidate window.

NOTE: The Uncertified will be available in the Select Writein Candidate list box in the Resolve Writein window so you can select it if a write-in is NOT to be accepted as a vote in the contest when you are resolving ballots (see Resolving write-in votes on page 74).

3 Click in the Add Writein Candidate field and type the name or alias for any write-in candidate that will be accepted as a vote in the contest (see Figure 4-6).

Figure 4-5 Add Writein Candidate window with a name typed in the Add Writein Candidate field.

4 Click .

The name or alias you typed appears in the Authorized Writein Candidates list (see Figure 4-6 on page 50).
Figure 4-6 Add Write-in Candidate window with a name added to the list.

5 Repeat Steps 4 and 5 as necessary for the contest displayed in the Select Contest field to complete the list of approved write-in names and aliases for that contest.

6 To add names and aliases for another contest, start over with Step 2 on page 48.

7 Click to save your changes and close the Add Write-in Candidate window.

Notes about defining certified candidate names and aliases

✓ If you typed a candidate name or alias in the Add Write-in Candidate field and clicked before you clicked , the message in Figure 4-7 appears.

1 Click in the message dialog box to close it.

2 Click in the Add Write-in Candidate window.

3 Click in the Add Write-in Candidate window to save your changes and close the window.

✓ If you typed a candidate name or alias in the Add Write-in Candidate field that already exists in the Authorized Write-in Candidates list, then clicked , the message shown in Figure 4-8 appears.

1 Click in the message dialog box to close it.
Steps for: Deleting a write-in name or alias from the list

You can delete a candidate name or alias from the Authorized Writein Candidates list in the Add Writein Candidate window.

1. From the Election menu, select Enter Certified Writeins (see Figure 4-1 on page 47). The Add Writein Candidate window appears.
2. Select the name or alias you want to delete (see Figure 4-9).
3. Click the name.
4. The selected name disappears from the Authorized Writein Candidates list (see Figure 4-10).
5. Click to save your changes and close the Add Writein Candidate window.

Figure 4-9 Add Writein Candidate window with a name selected to delete.

Figure 4-10 Add Writein Candidate window with the selected name deleted.

Deleting a write-in name or alias from the list

Chapter 4 Defining Certified Write-In Names and Aliases
Deleting a write-in name or alias from the list

Chapter 4: Defining Certified Write-In Names and Aliases

From Black Box Voting Document Archives
Chapter 5

Scanning Voted Ballots

Main Topics

- Pre-Scan Preparation on page 54.
  - Setting program options for the scanner on page 56.
  - Grouping ballots into batches on page 57.
  - Installing the Election MBB and opening the Election on page 58.
  - Loading pages in the scanner on page 58.

- Scanning a Batch of Ballots on page 59.
  - Scanner Setup tab, Program Options window on page 54.
  - Scan Batch window on page 59.
  - Starting the scanner to scan the batch of ballots on page 60.
  - Scan Batch Report window on page 62.

You will use the commands in the Scan Ballots menu (see Figure 5-1) to scan voted Election ballots to create CVRs which can later be written to the Election MBB for tallying in the Tally System.

Figure 5-1 Scan Ballots menu.

Scanning ballots is a three-part process: Pre-Scan, Scan, and Post-Scan.

- **Pre-Scan** (see page 54)
  - The Election MBB will be installed in the PC Card drive.
    (See Installing the Election MBB and opening the Election on page 58.)
  - Program options for scanning will be set up.
    (See Setting program options for the scanner on page 56.)
  - Ballots will be grouped into batches of a known number of ballots.
    (See Grouping ballots into batches on page 57.)
  - A batch of ballots will be loaded into the scanner.
    (See Loading pages in the scanner on page 58.)

- **Scan** (see page 59)
  - The scanner will be started.
    (See Starting the scanner to scan the batch of ballots on page 60.)
  - Scanner problems will be resolved.
    (See Notes about scanning ballot pages on page 63.)

- **Post-Scan** (see Chapter 6 Resolving and Recording Scanned Ballots beginning on page 65).
  - Ballots that have overvotes, undervotes, or write-ins, and blank ballots will need to be resolved
    (see Resolving Unresolved Ballots on page 69).
  - The CVRs will be written to the Election MBB (see Saving Cast Ballots to the MBB on page 85).
Pre-Scan Preparation

You can set a variety of options for the scanning process. These options are set in the Program Options window.

Scanner Setup tab, Program Options window

The Scanner Setup tab of the Program Options window contains settings that will be applied to the scanning process.

To open the Scanner Setup tab of the Program Options window:

1. From the Election menu, select Preferences (see Figure 5-2).
2. Click the Scanner Setup tab (see Figure 5-3).
The **Scanner** panel of the **Scanner Setup** tab of the **Program Options** window has choices described in Table 5-1.

### Table 5-1  Program Options window Scanner Setup tab Scanner panel list.

<table>
<thead>
<tr>
<th>Option Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scanner panel</strong></td>
<td>Select one of the <strong>Scanner</strong> scanners from the list to define which scanner is installed:</td>
</tr>
<tr>
<td>Fujitsu M4099</td>
<td>This option enables use of the Fujitsu M4099 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Fujitsu M4097</td>
<td>This option enables use of the Fujitsu M4097 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Fujitsu M3097</td>
<td>This option enables use of the Fujitsu M3097 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Kodak 9520</td>
<td>This option enables use of the Kodak 9520 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Kodak 3500</td>
<td>This option enables use of the Kodak 3500 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Kodak 3520</td>
<td>This option enables use of the Kodak 3520 scanner with Ballot Now.</td>
</tr>
<tr>
<td>Kodak 1500</td>
<td>This option enables use of the Kodak 1500 scanner with Ballot Now.</td>
</tr>
</tbody>
</table>

The **Scanner Setup** tab of the **Program Options** window has the check boxes described in Table 5-2.

### Table 5-2  Program Options window Scanner Setup tab check boxes.

<table>
<thead>
<tr>
<th>Check Boxes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scan Duplex Ballot</strong></td>
<td>Place a check mark in this check box if you want the scanner to scan both sides of the ballots because they were printed on both sides of the paper (duplex). Remove the check mark from this check box if the ballots you will scan were printed single-sided (print appears only on one side of the paper).</td>
</tr>
<tr>
<td><strong>Disallow Duplicate Ballots</strong></td>
<td>Place a check mark in this check box if you want Ballot Now to search the database for an identical ballot every time a ballot is scanned, and disallow the ballot if it is a duplicate. Remove the check mark from this check box if you do not want Ballot Now to monitor for duplicate ballots.</td>
</tr>
</tbody>
</table>

**NOTE:** If serial numbers were disabled or were set to print on **Ballot Stub Only** when the ballots were printed, the serial number field on the printed ballot will always show zeroes. Therefore, do not put a check mark in the **Disallow Duplicate Ballots** check box (see Setting program options for ballot printing on page 31).

The **Program Options** window has the buttons described in Table 5-3. These buttons apply to all the tabs in the **Program Options** window.

### Table 5-3  Program Options window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save]</td>
<td>Click this button to save changes made in any of the tabs in the <strong>Program Options</strong> window.</td>
</tr>
<tr>
<td>![Cancel]</td>
<td>Click this button to close the <strong>Program Options</strong> window without saving your changes.</td>
</tr>
</tbody>
</table>
For the current ballot scanning session, you must set the preferences for the scanner that is connected to the Ballot Now system.

The following scanner preferences are available in the Scanner Setup tab of the Program Options window (see Figure 5-4):

- **Scanner** — The scanner you are using must be selected.
- **Scan Duplex Ballot** — If the ballots you will scan were printed on both sides of the paper, this check box must be checked.
- **Disallow Duplicate Ballots** — If you want Ballot Now to monitor for duplicate ballots when serial numbers were printed on the ballots, this check box must be checked.

To set scanner preferences for the scanning session:
1. Open the Program Options window as described on page 54.
2. In the Scanner Setup tab of the Program Options window, select the name of the scanner you will use to scan ballots.
3. Select whether to scan both sides of the ballot:
   - If the ballots you will scan were printed on both sides of the paper, click in the Scan Duplex Ballot check box to place a check mark in it (see Figure 5-4).
   - If the ballots you will scan were only printed on one side of the paper, click in the Scan Duplex Ballot check box to remove the check mark from it.
4. Select whether to reject duplicate ballots. If the ballots have serial numbers:
   - Click the Disallow Duplicate Ballots check box to place a check mark in it (see Figure 5-4) if you want Ballot Now to monitor for duplicate ballots.
   - Click the Disallow Duplicate Ballots check box to remove the check mark from it (see Figure 5-4) if you do not want Ballot Now to monitor for duplicate ballots.

   **NOTE:** If the serial number field on the printed ballot shows zeroes, serial numbers were disabled or were set to print on Ballot Stub Only when the ballots were printed (see Setting program options for ballot printing on page 31). Therefore, do not put a check mark in the Disallow Duplicate Ballots check box.

5. Click **OK** to save your changes to the Program Options window and close it.
6. Go to Grouping ballots into batches on page 57.

---

**Figure 5-4** Scanner Setup tab in the Program Options window set to scan duplex ballots and ignore duplicate ballots.
Steps for: Grouping ballots into batches

A scan batch consists of a user-determined number of ballot pages to be processed at one time by the scanner and the Ballot Now application. Ballots can be grouped by precincts to build a scan batch, or ballots from different precincts may be mixed in the scan batch.

To group ballots:

1. Organize a pile of ballot pages with:
   - the same side of the pages facing up and the tops of the ballots all facing the same direction.
   - the pages from each ballot in page-number order, as follows:
     - Single-sided ballots
       - Page 1 on top
       - Page 2 after Page 1
       - ...
       - Last Page
     - Duplex ballots
       - Page 1 on top
       - Page 3 after Page 1
       - ...
       - Last Page

2. Count out some number of pages.
   - NOTE: Between 50 and 250 pages is a reasonable number for a batch of ballots.

3. To the top page in the pile of ballots, attach a note that describes that particular scan batch, e.g., "Precincts 8003 through 8009."
   - NOTE: You must remove the attached note just prior to loading the scan batch in the scanner.

The rules Ballot Now uses to handle ballots that are incomplete (have missing pages) are described in Notes about incomplete ballots on page 61.
Steps for: Installing the Election MBB and opening the Election

The Election MBB must be installed in the PC Card drive and the corresponding Election opened in the Ballot Now application before you can set up and scan a batch of ballots.

✔ To install the Election MBB in the PC Card drive:
1. Locate the Election MBB you want to work with.
2. Insert the Election MBB into the PC card drive.

✔ To open the Election:
• Follow the instructions in Selecting an Election to work with on page 22.

Steps for: Loading pages in the scanner

Only one scan batch of ballots should be loaded into the scanner at a time.

✔ To load a scan batch into the scanner:
1. Create a scan batch of ballot pages to load into the scanner as described in Grouping ballots into batches on page 57.
2. Remove the note you attached to the top page of the scan batch and save it for reattaching to the top page of the scan batch after the scan batch has been scanned.
3. Place all the ballot pages in the scan batch into the input tray of the scanner. Load as follows:
   • the text side into the tray according to the instructions that came with the scanner
   • the top of the ballot oriented toward the scanner (See Figure 5-5)
4. Turn on the scanner if it isn't already on.

Figure 5-5 Loading a batch of ballots in the scanner.
Scanning a Batch of Ballots

Before you start the scanner, be sure all the steps included in the Pre-Scan Preparation section have been completed (the Pre-Scan Preparation section begins on page 54).

When the Election is open and the scan batch has been loaded into the scanner, you will use the Scan Ballots window to start the scanning process.

Scan Batch window

✓ To open the scan Scan Ballots window:

1. From the Scan Ballots menu, select Scan Ballots (see Figure 5-6). The Scan Ballots window appears (see Figure 5-7).

   ![Figure 5-6 Scan Ballots menu.]

   ![Figure 5-7 Scan Ballots window.]

The Scan Ballots window has the display fields described in Table 5-4.

<table>
<thead>
<tr>
<th>Display Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Election</td>
<td>Displays the name of the Election you are working with.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays the current date and time.</td>
</tr>
<tr>
<td>Scan Batch ID</td>
<td>Displays the ID number assigned to this scan batch.</td>
</tr>
</tbody>
</table>

The Scan Ballots window has the data entry field described in Table 5-5.

<table>
<thead>
<tr>
<th>Data Entry Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Scan Batch Notes (optional)</td>
<td>Type appropriate notes about the batch of ballots that you are about to scan.</td>
</tr>
</tbody>
</table>
The Election window has the buttons described in Table 5-6.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Start Scan]</td>
<td>Click this button to start the scanner. The Scanning: Scan Batch n window appears.</td>
</tr>
<tr>
<td>![Cancel]</td>
<td>Click this button to close the Scan Ballots window (the ballots will not be scanned).</td>
</tr>
</tbody>
</table>

### Steps for: Starting the scanner to scan the batch of ballots

1. To start the scanner and scan the batch of ballots:
   1. Open the Scan Ballots window as described on page page 59.
      - The Scan Ballots window appears showing the name of the Election, the current date and time, and the ID number for the batch of ballots that will be scanned for the Election (see Figure 5-7 on page 59).
   2. Enter appropriate notes about the scan batch in the Enter Scan Batch Notes field of the Scan Ballot window (see Figure 5-8).

2. Click ![Start Scan]. The Scanning: Scan Batch n window appears (see Figure 5-9) showing the progress of the scanning process (the Image number increments by one each time a page is scanned).

3. When the scanner has finished scanning the scan batch, the Scan Complete: Batch n window appears (see Figure 5-10 on page 61).
5 The number displayed in the Pages Processed field of the Scan Complete: Batch n window should be equal to the number of ballot pages in the scan batch.

NOTE: If the ballots being scanned are multi-page, the value in the Pages Processed field will not equal the value in the Ballots Accepted field.

6 To review the data the Ballot Now application read in from the ballots in the scan batch, click .

The Scan Batch Report window appears (see Scan Batch Report window on page 62).

7 Click in the Scan Complete: Batch n window to save the data from the scan batch to the Election database on the computer's hard drive and close the Scan Complete: Batch n window,

OR

Click to close the Scan Complete: Batch n window without saving the data from the scan batch.

8 Remove the scan batch from the scanner's output tray.

9 Locate the note you removed from the top page of that scan batch.

10 Mark on the note that the scanning of the scan batch was either SAVED or CANCELLED.

11 To the top page of that scan batch, re-attach the note that describes the scan batch.

12 Place the scanned scan batch in an area separate from unscanned scan batches.

Notes about incomplete ballots

An incomplete ballot, that is, a ballot with a missing page or pages, is accepted by Ballot Now if the following conditions are true:

◆ Page 1 of the ballot is present and is scanned first.
◆ All subsequent pages of the ballot are in order.

If these requirements are met:

◆ The ballot is counted as an Accepted ballot.
◆ All contests on the pages that were present are tabulated as usual.
◆ All contests on that were on the missing pages are tabulated as undervotes on the ballot.

If Page 1 of a ballot is missing, all other pages of that ballot will be rejected.

If Page 1 of the ballot is present, but pages subsequent to Page 1 are out of order, the out-of-order pages will be rejected and any subsequent pages that are in order are considered an incomplete ballot (that is, all contests on that were on the missing pages are tabulated as undervotes on the ballot).
Scan Batch Report window

When you click in the Scan Complete: Batch n window (see Step 6 on page 61), the Scan Batch Report window appears showing the recognized ballots. The results listed in the Scan Batch Report window are a confirmation that ballot data was collected from the scan batch during the scanning process.

Figure 5-11 shows the Scan Batch Report for a scan batch that contained duplicate ballots and unidentified forms.

![Scan Batch Report - Unofficial](image)

**Figure 5-11 Scan Batch Report window showing that the scan batch contained rejected ballots.**

The Scan Batch Report is described in Chapter 8 Reports, Scan Batch Report on page 104.

✓ To print the Scan Batch Report:
- Click the printer icon at the top of the report window. (For more information on printing a report, see Printing a report on page 100.)
Notes about scanning ballot pages

1. Problems with the scanner

✓ If the scanner was not turned on when the Scan Ballots command was selected from the Scan Ballots menu, the Configure Device Settings window appears (see Figure 5-12).

1. Turn on the scanner.
2. Click .
3. From the Selected Device list box in the Configure Device Settings window, select the name of the scanner.
4. From the Default Page Size list box, select the page size that matches the size of the ballots you intend to scan.
5. Click in the Configure Device Settings window to close it.
6. From the Scan Ballots menu, select Scan Ballots (see Starting the scanner to scan the batch of ballots on page 60).

✓ If the correct scanner was not selected in the Scanner Setup tab of the Program Options window when Scan Ballots was selected from the Scan Ballots menu, the Configure Device Settings window appears (see Figure 5-12).

1. Click  in the Configure Device Settings window.
2. Be sure the scanner is turned on.
3. Select the correct scanner in the Scanner Setup tab of the Program Options window (see Setting program options for the scanner on page 56).
4. From the Scan Ballots menu, select Scan Ballots (see Starting the scanner to scan the batch of ballots on page 60).

2. Problems with the scanner's input tray

✓ If a paper jam occurred:

1. Remove all pages from the scanner.
2. Click  in the Scan Complete: Batch n window (see Figure 5-10 on page 61).
3. Reload the scan batch in the scanner's input tray.
4. Re-scan the batch.
Chapter 5 Scanning Voted Ballots

Scan Batch Report window

- From Black Box Voting Document Archives-
Chapter 6

Resolving and Recording Scanned Ballots

Main Topics

- Allowing Free-Form Write-Ins Ballots on page 66.
- Setting program options for free-form write-ins on page 68.
- Resolving Unresolved Ballots on page 69.
- Opening the Resolve Ballot window on page 69.
- Resolving overvoted or undervoted contest(s) on page 72.
- Resolving write-in votes on page 74.
- Autoresolving ballots on page 77.
- Reviewing, Deleting Scan Batches on page 80.
- Reviewing a scan batch on page 82.
- Deleting a scan batch on page 84.
- Saving Cast Ballots to the MBB on page 85.

Before you can write all the CVRs to the Election MBB (record the ballots), you will use the commands in the Record Ballots menu (see Figure 6-1) to:

- Resolve overvoted and undervoted ballots (see Resolving overvoted or undervoted contest(s) on page 72)
- Resolve write-in votes (see Setting program options for free-form write-ins on page 68 and Resolving write-in votes on page 74)

If desired, you can let Ballot Now automatically resolve overvoted, undervoted, or blank ballots (see Autoresolving ballots on page 77).

At any time you can review the scan batches (see Reviewing a scan batch on page 82).

If the CVRs have not yet been written to the Election MBB, you can delete a scan batch so that it can be re-scanned (see Deleting a scan batch on page 84).

When you have finished a session of scanning ballots, you can save the CVRs to the Election MBB (see Saving Cast Ballots to the MBB on page 85).
Allowing Free-Form Write-Ins Ballots

If the Election allows free-form write-ins for candidates, you must use the Ballot Resolution tab in the Program Options window to enable free-form write-ins before you resolve unresolved ballots in the Resolve Ballot window.

**NOTE:** For an election that has certified write-in candidate names, the list of certified names is defined in the Add Write-In Candidate window (see Defining certified write-in names and aliases on page 48).

**Ballot Resolution tab, Program Options window**

The Ballot Resolution tab of the Program Options window contains settings that will be applied to write-ins detected on ballots.

✔ To open the Ballot Resolution tab of the Program Options window:

1. From the Election menu, select Preferences (see Figure 6-2).
   The Program Options window appears.
2. Click the Ballot Resolution tab (see Figure 6-3).

![Figure 6-2 Election menu](image)

![Figure 6-3 Ballot Resolution tab in the Program Options window](image)
The Ballot Resolution tab of the Program Options window has the check box described in Table 6-1.

Table 6-1  Program Options window Ballot Resolution tab check boxes.

<table>
<thead>
<tr>
<th>Check Box</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Free Form Write-in Resolution</td>
<td>When checked, enables entry of free-form write-in names in the Resolve Ballot window. This feature allows you to resolve write-ins that were not defined in the Add Write-in Candidate window (see Add Write-in Candidate window on page 48).</td>
</tr>
</tbody>
</table>

The Program Options window has the buttons described in Table 6-2. These buttons apply to all the tabs in the Program Options window.

Table 6-2  Program Options window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Click this button to save changes made in any of the tabs in the Program Options window.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td>Click this button to close the Program Options window without saving your changes.</td>
</tr>
</tbody>
</table>
Steps for: Setting program options for free-form write-ins

✓ To set the preferences for how free-form write-ins will be handled in the Resolve Ballot window:

1. Open the Program Options window as described on page 66.
2. Click the Ballot Resolution tab (see Figure 6-4).

![Figure 6-4 Ballot Resolution tab in the Program Options window.](image)

3. Check or uncheck the Enable Free Form Write-in Resolution check box.
   - Place a check mark in the check box if you want to enable free-form resolution of the write-ins that Ballot Now detects.
   - Remove the check mark in the check box if you don't want to allow free-form resolution of the write-ins that Ballot Now detects.

4. Click to save your changes to the Program Options window and close it.
5. Go to Resolving Unresolved Ballots on page 69.
Resolving Unresolved Ballots

Before the CVRs from scanned ballots can be written to the Election MBB, ballots that have overvotes, undervotes, or write-ins, and blank ballots must be resolved in the Resolve Ballot window. These ballots can be resolved any time before you close the Election in Ballot Now.

Steps for: Opening the Resolve Ballot window

To open the Resolve Ballot window:
1. From the Record Ballots menu, select Resolve Unresolved Ballots (see Figure 6-5). The Resolve Ballot window appears (see Figure 6-6).

Resolve Ballot window

Figure 6-6 Resolve Ballot window showing a ballot that has overvotes.
The Resolve Ballot window has the display fields described in Table 6-3.

### Table 6-3 Resolve Ballot window display fields.

<table>
<thead>
<tr>
<th>Display Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ballot thumbnail images</td>
<td>Thumbnail images of the pages of the ballot appear on the left side of the Resolve Ballot window. The thumbnail for the ballot page currently displayed in the middle of the Resolve Ballot window blinks.</td>
</tr>
<tr>
<td>ballot image</td>
<td>The image of the unresolved ballot page is displayed in the middle of the Resolve Ballot window.</td>
</tr>
<tr>
<td>BatchNumber n</td>
<td>The scan batch number.</td>
</tr>
<tr>
<td>Sequence Number n</td>
<td>Ballots are displayed in the Resolve Ballot window in the same order that they were scanned. This number shows the position of the ballot in the scan batch displayed in the BatchNumber field.</td>
</tr>
<tr>
<td>Page n</td>
<td>The page number of the ballot page currently displayed in the middle of the Resolve Ballot window.</td>
</tr>
<tr>
<td>Serial Number n</td>
<td>The serial number of the ballot page currently displayed in the middle of the Resolve Ballot window (if any).</td>
</tr>
<tr>
<td>Contest Status</td>
<td>Lists the portions of the ballot page currently displayed in the middle of the Resolve Ballot window that need to be resolved.</td>
</tr>
</tbody>
</table>

The Resolution Control panel in the Resolve Ballot window has the controls described in Table 6-4.

### Table 6-4 Resolution Control panel controls.

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Batch list box</td>
<td>This list box contains the batch numbers for the scanned ballots.</td>
</tr>
</tbody>
</table>
| Resolve Overvotes check box | ◆ Click this check box to place a check mark in it if you want to resolve overvotes in the Resolve Contest window for the scan batch displayed in Select Batch.  
 ◆ Remove the check mark from this check box if you do not want to resolve overvotes in the scan batch displayed in Select Batch. |
| Resolve Undervotes check box | ◆ Click this check box to place a check mark in it if you want to resolve undervotes in the Resolve Contest window for the scan batch displayed in Select Batch.  
 ◆ Remove the check mark from this check box if you do not want to resolve undervotes in the scan batch displayed in Select Batch. |
| Resolve Writeins check box | ◆ Click this check box to place a check mark in it if you want to resolve write-in votes in the Resolve Writein window for the scan batch displayed in Select Batch.  
 ◆ Remove the check mark from this check box if you do not want to resolve write-in votes in the scan batch displayed in Select Batch. |
| Enable AutoResolve check box | ◆ Click this check box to place a check mark in it if you want to enable the AutoResolve panel controls.  
 ◆ Remove the check mark from this check box if you do not want to enable the AutoResolve panel controls. |
Table 6-4 Resolution Control panel controls. (Continued)

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resolve Ballot</td>
<td>Click this button to display the Resolve Contest window.</td>
</tr>
<tr>
<td>Next Ballot</td>
<td>Click this button to display the next ballot for the scan batch displayed in Select Batch in the Resolve Contest window.</td>
</tr>
</tbody>
</table>

The AutoResolve panel in the Resolve Ballot window has the controls described in Table 6-5.

Table 6-5 AutoResolve panel controls.

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
</table>
| Overvotes check box | - Click this check box to place a check mark in it if you want Ballot Now to resolve overvotes as overvotes for all scan batches when you click Resolve Ballot.  
      | - Remove the check mark from this check box if you do not want to resolve overvotes for all scan batches when you click Resolve Ballot. |
| Undervotes check box | - Click this check box to place a check mark in it if you want Ballot Now to resolve undervotes as undervotes for all scan batches when you click Resolve Ballot.  
      | - Remove the check mark from this check box if you do not want to resolve undervotes for all scan batches when you click Resolve Ballot. |
| Blank Ballots check box | - Click this check box to place a check mark in it if you want Ballot Now to resolve blank ballots as blank ballots for all scan batches when you click Resolve Ballot.  
      | - Remove the check mark from this check box to have all contests on blank ballots resolved as undervotes when you click AutoResolve. |
| AutoResolve      | Click this button to have Ballot Now automatically resolve the types of unresolved ballots selected in the check boxes of the AutoResolve panel.  
      | NOTE: This affects ALL scan batches and there is no UNDO. |

The Resolve Ballot window has the buttons described in Table 6-6.

Table 6-6 Resolve Ballot window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unresolved Ballot Report</td>
<td>Click this button to view the Unresolved Image Report window, which shows the status of batches containing unresolved ballot images.</td>
</tr>
</tbody>
</table>
| Zoom In                 | Click this button to zoom in on the ballot image.  
      | NOTE: You can also zoom in by pressing the left mouse button and dragging over the area you want to enlarge. |
| Fit Window              | Click this button to fit the ballot image in the window.                     |
| Quit Resolution         | Click this button to close the Resolve Ballot window.                       |
Steps for: Resolving overvoted or undervoted contest(s)

When one or more overvotes or undervotes for contests on a scanned ballot are detected, that contest appears listed in the Contest Status list box of the Resolve Ballot window.

A ballot with overvotes and undervotes in contests is shown in Figure 6-7.

The overvotes and undervotes must be accepted or rejected in the Resolve Contest window before the CVR from the ballot can be written to the Election MBB.

The overvotes and undervotes can be resolved one at a time using the steps on page 73, or you can let Ballot Now automatically resolve all overvotes and/or resolve all undervotes in the unresolved ballots queue (see Autresolving ballots on page 77).

NOTE: When an overvote occurs in a contest that has a dependent contest, Ballot Now requires that both the parent contest and the dependent contest be resolved if the dependent contest contained any votes. Thus, when the parent contest is resolved, the dependent contest must also be resolved, even if the dependent contest was voted on correctly.

Figure 6-7 Resolve Ballot window showing overvotes and undervotes.
To resolve an overvote or undervote in a contest:
1. Click the Resolve Overvotes and/or Resolve Undervotes check box to place a check mark in it.
2. Click the Resolve Contest button.
   The Resolve Contest window appears (see Figure 6-8 on page 73).
3. If you can determine the voter's intent to vote for a choice, from the Select Chosen Option list box, select the option you think the voter intended to vote for, then click Check Contest. If not, go to Step 5.
4. Click the Resolve Contest button.
   • The Resolve Contest window closes.
   • The Resolve Ballot window reappears.
   • The choice you selected will be counted for that contest.
5. If you think the contest is actually overvoted or undervoted, click Confirm Overvote, as available.
6. Click the Confirm Overvote button.
   • The Resolve Contest window closes.
   • The Resolve Ballot window reappears.
   • No choices will be counted for that contest.

NOTE: If you “Confirm” the overvoted or undervoted contest and then decide to award the vote, BEFORE you click Confirm you must:
   a. Click in the Resolve Contest window to cancel your actions, then
   b. Click to open the Resolve Contest window again and resolve the contest.
   c. Click .
Steps for: Resolving write-in votes

NOTE: All overvoted and undervoted contests must be resolved before write-ins are resolved. See Resolving overvoted or undervoted contest(s) on page 72 and Autoresolving ballots on page 77.

When a write-in vote is detected on a scanned ballot, the contest that contained the write-in appears listed in the Contest Status list box of the Resolve Ballot window.

The write-in vote must be resolved in the Resolve Write-in window before the CVR from the ballot can be written to the Ballot Now MBB.

- For an election that has certified write-in candidate names, the list of certified names is defined in the Add Write-In Candidate window (see Defining certified write-in names and aliases on page 48).
- For an election that allows free-form write-ins for candidates, you must use the Ballot Resolution tab in the Program Options window to enable free-form write-ins before you resolve unresolved ballots in the Resolve Ballot window (see Setting program options for free-form write-ins on page 68).

A ballot with a write-in in a contest detected is shown in Figure 6-9.

![Figure 6-9 Resolve Ballot window showing write-ins in a contest.](image-url)
Resolving certified write-ins

To resolve a certified write-in for the ballot currently displayed in the Resolve Ballot window:
1. Click the Resolve Writeins check box to place a check mark in it.
2. Click [Resolve] in the Resolve Ballot window.
   The Resolve Writein window appears with the name of the contest displayed in the Contest field.
3. From the Select Writein Candidate list box in the Resolve Writein window, select the candidate name or alias that matches the voter's intent (see Figure 6-10).
   NOTE: The Select Writein Candidate list box in the Resolve Writein window contains the names or aliases from the certified list of write-in candidate names and aliases that was created prior to scanning ballots (see Chapter 4 Defining Certified Write-In Names and Aliases on page 47).
4. Click [Resolve] in the Resolve Writein window to accept the choice now displayed in the Select Writein Candidate field.
   • The Resolve Writein window closes.
   • If another unresolved ballot exists in the scan batch, it will display in the Resolve Ballot window.

Notes about resolving write-ins

If you try to resolve write-ins before all overvotes and undervotes have been resolved, the message shown in Figure 6-11 appears.

1. Click [OK] in the dialog box.
2. Resolve any remaining overvotes and undervotes.
3. Resolve write-in votes.
Resolving free-form write-ins

✓ To resolve a free-form write-in for the ballot currently displayed in the Resolve Ballot window:
  1. Click the Resolve Writeins check box to place a check mark in it.
  2. Click in the Resolve Ballot window.

The Resolve Writein window appears with:
- the name of the contest displayed in the Contest field and
- the Enter Text for Writein field for entering the free-form write-in candidate name (see Figure 6-12).

NOTE: In order to use the Enter Text for Writein field for entering free-form write-in names for candidates, you must use the Ballot Resolution tab in the Program Options window to enable free-form write-ins before you resolve unresolved ballots in the Resolve Ballot window.

3. Click in the Enter Text for Writein field in the Resolve Writein window and type the candidate name or alias that matches the voter's intent (see Figure 6-13).

4. Click in the Resolve Writein window to accept the choice now displayed in the Enter Text for Writein field.
- The Resolve Writein window closes.
- If another unresolved ballot exists in the scan batch, it will display in the Resolve Ballot window.
**Steps for: Autoresolving ballots**

When the button is enabled, you can let Ballot Now resolve the types of unresolved ballots selected in the check boxes of the AutoResolve panel of the Resolve Ballot window.

**NOTE:** All overvoted and undervoted contests must be resolved before write-ins are resolved.

**IMPORTANT!**

When check boxes are checked in the AutoResolve panel (Overvotes, Undervotes, and/or Blank Ballots check boxes), clicking the button causes all of the check marked types of unresolved ballots in the unresolved queue from all the scan batches to be automatically resolved by Ballot Now, and there is no UNDO.

✔ To let Ballot Now resolve and count the overvotes, undervotes, and/or blank ballots as they appear in all the scan batches:

1. Review the ballots for the scan batches displayed in the Resolve Ballot window.
2. Click the Enable Auto Resolve check box to place a check mark in it.

The button appears enabled (see Figure 6-14).

![Figure 6-14 Resolve Ballot window showing the AutoResolve button enabled and the Overvotes check box checked.](image)
3 Place a check mark in the appropriate check boxes in the **AutoResolve** panel:
- Place a check mark in the **Overvotes** check box (see Figure 6-14 on page 77) to have Ballot Now automatically resolve overvotes for all scan batches when you click **AutoResolve**.
- Place a check mark in the **Undervotes** check box to have Ballot Now automatically resolve undervotes for all scan batches when you click **AutoResolve**.
- Place a check mark in the **Blank Ballots** check box to have Ballot Now automatically resolve blank ballots for all scan batches when you click **AutoResolve**.

4 Click **AutoResolve**.
- The **AutoResolve** progress window appears (see Figure 6-15).
- For the checked check boxes in the **AutoResolve** panel, Ballot Now automatically resolves overvotes as overvotes, undervotes as undervotes, and/or blank ballots as blank ballots.
- You can cancel the autoresolve process while the **AutoResolve** progress window is displayed (see **Cancelling During AutoResolve**, below).

![AutoResolve progress window](image-url)
Notes about autoresolving ballots

Overview of AutoResolve

The autoresolve feature resolves contests in the following manner:
- If Ballot Now has determined that the contest is undervoted, then:
  - no votes are counted in that contest, and
  - the Tally application will report that contest as undervoted.
- If Ballot Now has determined that the contest is overvoted, then:
  - no votes are counted in that contest, and
  - the Tally application will report that contest as overvoted.

The autoresolve feature will not affect write-in votes. Write-in votes must still be resolved manually.

Cancelling During AutoResolve

During the autoresolve process, the AutoResolve progress window appears (see Figure 6-15) showing the advancement of the autoresolve process.

✓ To cancel the autoresolve process while the AutoResolve progress window is displayed:
  1 Click in the AutoResolve progress window.
  2 All autoresolve changes are discarded.
  3 The ballots and scan batches are restored to the resolve state they were in prior to when you invoked the AutoResolve function.
  4 The AutoResolve canceled message appears (see Figure 6-16).

![Figure 6-16 AutoResolve canceled dialog box.]

2 Click in the AutoResolve canceled dialog box to close it.

Recovery after AutoResolve

If you have mistakenly used the button to let Ballot Now automatically resolve all the overvotes, undervotes, or blank ballots, and the scan batches have NOT YET been written to the MBB (see Saving Cast Ballots to the MBB on page 85), you can recover by deleting those scan batches and re-scanning the ballots.

✓ To re-scan the original ballots in order to recover from the automatic resolve process you performed by mistake:
  1 Follow the steps in Reviewing, Deleting Scan Batches on page 80 to delete the scan batches that were automatically resolved by Ballot Now.
  2 Re-scan those scan batches.
  3 Resolve the re-scanned batches.
Reviewing, Deleting Scan Batches

You can use the Scan Batch Management command in the Record Ballots menu to view the Scan Batch Management window. From the Scan Batch Management window you can:

- review the statistics for the Election's scan batches
- review the statistics for a particular scan batch in the Scan Batch Report window
- delete a scan batch so that you can re-scan it

Scan Batch Management window

To open the Scan Batch Management window:

1. From the Admin menu, choose Login (see Figure 6-17).
   The Ballot Now Login window appears.
2. In the Ballot Now Login window, log into Ballot Now as an Administrator user (described in Logging in to Ballot Now on page 17).
3. From the Record Ballots menu, choose Scan Batch Management (see Figure 6-18).
   The Scan Batch Management window appears (see Figure 6-19).

Figure 6-17 Admin menu.

Figure 6-18 Record Ballots menu.

Figure 6-19 Scan Batch Management window.

80 Chapter 6 Resolving and Recording Scanned Ballots
The **Scan Batch Management** window table has the columns described in **Table 6-7**.

### Table 6-7 Scan Batch Management window columns.

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch</td>
<td>Displays the number (ID) of the scan batch.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays the date and time the batch ballots was scanned.</td>
</tr>
<tr>
<td>Ballots</td>
<td>Displays the number of ballots accepted during scanning of the batch.</td>
</tr>
</tbody>
</table>
| Resolve Status | Displays the status of the scan batch:  
|                | - **Resolved** — Indicates that the ballots in the batch have been resolved in the **Resolve Ballots** window.  
|                | - **Unresolved** — Indicates that the ballots in the batch have not yet been resolved in the **Resolve Ballots** window.  
|                | - **Not image processed** — Indicates the number of ballots in the batch that have not yet been processed by the Ballot Now Image Processor (BNIP). |
| Batch Notes    | Displays the notes for the batch that were entered in the **Enter Scan Batch Notes** field of the **Scan Ballot** window. |

The **Election** window has the buttons described in **Table 6-8**.

### Table 6-8 Scan Batch Management window buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Scan Batch Report]</td>
<td>Click this button to open the <strong>Scan Batch Report</strong> window.</td>
</tr>
<tr>
<td>![Delete Batch]</td>
<td>Click this button to delete the scan batch (opens the <strong>Delete Batch</strong> dialog box).</td>
</tr>
<tr>
<td>![Close]</td>
<td>Click this button to close the <strong>Scan Batch Management</strong> window.</td>
</tr>
</tbody>
</table>
Steps for: Reviewing a scan batch

1. Open the Scan Batch Management window as described on page 80.
2. Select the batch number you want to work with.
   The ➔ arrowhead points to the Batch that is currently selected.
3. To view the Scan Batch Report report for the selected scan batch, click .
   The Scan Batch Report window appears (see Figure 6-21 on page 83).

![Figure 6-20 Scan Batch Management window with a Batch number selected.](image)
The Scan Batch Report is described in Chapter 8 Reports, Scan Batch Report on page 104.

To print the Scan Batch Report:

- Click the printer icon at the top of the report window. (For more information on printing a report, see Printing a report on page 100.)
Steps for: Deleting a scan batch

Scan batches can only be deleted if the CVRs for the batch have NOT YET been written to the MBB (see Saving Cast Ballots to the MBB on page 85).

1. Open the Scan Batch Management window as described on page 80.
2. Select the batch number you want to delete.
   The ▶ arrowhead points to the Batch that is currently selected.
3. To delete the selected scan batch, click ✂ in the Batch Edit dialog box.
   The Delete Batch dialog box appears (see Figure 6-22).
4. To confirm deleting the scan batch, click ✂ in the Delete Batch dialog box.
   The scan batch will be deleted from the Election database.

Figure 6-22 Delete Batch dialog box.
Saving Cast Ballots to the MBB

The valid CVRs that were created by the scanning process must be written to the Election MBB so that the votes can be counted in the Tally System.

You can perform this function after:

- each scan batch has been scanned and resolved, and/or
- all scan batches have been scanned and resolved.

The Save Cast Ballots function from the Record Ballots menu writes all resolved CVRs in the Ballot Now database to the Ballot Now MBB. Any CVRs that are not resolved will not be written and will remain with the Election in Ballot Now until they are resolved.

NOTE: The Election cannot be closed in Ballot Now until all unresolved ballots are resolved.

Steps for: Saving cast vote records to the Election MBB

To save CVRs to the Election MBB:

1. Insert the Ballot Now MBB into the PC Card drive.
2. Open the Election as described in Selecting an Election to work with on page 22.

3. From the Record Ballots menu, select Save Cast Ballots to Card (see Figure 6-23).
   - The CVRs are written to the MBB.
   - The Cast Vote Status window appears (see Figure 6-24).

4. Click in the Cast Vote Status window to close it.

NOTE: CVRs are saved to the MBB on a batch-by-batch basis. The CVRs for a batch can only be saved to the MBB if all ballots in that batch are resolved.
Saving cast vote records to the Election MBB

**Chapter 6** Resolving and Recording Scanned Ballots
Chapter 7

Administration Tasks

Main Topics

| Login Task on page 88. | Add User Task on page 90. |
| Logout Task on page 88. | Deleting a User on page 92. |
| Change Password Task on page 89. |

Operators and/or Administrators will use the commands in the Admin menu (see Figure 7-1) to perform the following tasks:

- Login to the Ballot Now application (see Login Task on page 88)
- Log out of the Ballot Now application (see Logout Task on page 88)
- Change a password (see Change Password Task on page 89)
- Add users (see Add User Task on page 90)
- Delete users (see Deleting a User on page 92)

Commands in the Admin menu become enabled after a user has logged into the Ballot Now application (see in Login Task below). Table 7-1 shows which types of users have privileges to use the enabled commands in the Admin menu.

Table 7-1 User privileges for the Admin menu commands.

<table>
<thead>
<tr>
<th>Admin Menu Command</th>
<th>Operator</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Logout</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Change Password</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Add User</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Delete User</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Figure 7-1 Admin menu.
Login Task

Administrators and operators gain the ability to open an Election and access features and functions in the Ballot Now application by selecting Login from the Admin menu and then entering their User ID and password. These steps are described in Opening the Ballot Now window on page 16.

Logout Task

When a user is finished with their Ballot Now session, they must logout using the Logout command in the Admin menu.

Steps for: Logging out of the current Election

To log out of the Ballot Now application:

1. From the Admin menu, choose Logout (see Figure 7-2).

   The Ballot Now window remains open.

Figure 7-2 Admin menu.
Change Password Task

The user currently logged into Ballot Now can change their own password.

Steps for: Changing a password

✓ To change a password:

1. From the Admin menu, choose Login.
   The Ballot Now Login window appears.
2. In the Ballot Now Login window, log into Ballot Now as the user for whom the password will be changed.

3. From the Admin menu, choose Change Password (see Figure 7-3).
   The Change Password window appears (see Figure 7-4).

4. In the Old Password field, type the existing password for the user currently logged into Ballot Now.
   NOTE: The password is case-sensitive, so type uppercase and lowercase letters exactly.
5. In the New Password field, type the new password for the user currently logged into Ballot Now.
   NOTE: Passwords must be between 6 and 12 characters long, and consist of letters and/or numbers only.
6. In the Confirm New Password field, type the new password again.
7. Click to save your changes to the Change Password window and close it.
   The user must type the new password the next time they log into Ballot Now.
Add User Task

A user with Administrator privileges can add user names, passwords, and privileges or modify an existing user’s password and/or privileges for access to the Ballot Now application with the Add User command in the Admin menu. (See Figure 7-5).

Users of the Ballot Now application can be assigned one of the following authorities:

- Operator
- Administrator

The privileges these two types of users have to use the features and functions in the Ballot Now application are described in User Privileges on page 18.

Steps for: Adding a user

Only an Administrator can add a new user. Operators cannot add new users. “User” in this context means either an Administrator or an Operator.

To add or change a user’s User ID, the user’s password, and the user’s privileges:

1. From the Admin menu, choose Login.
   - The Ballot Now Login window appears.
2. In the Ballot Now Login window, log into Ballot Now as an Administrator user.
3. From the Admin menu, choose Add User (see Figure 7-5).
   - The Add User window appears (see Figure 7-6).

4. In the Permission Level field, select one of the options:
   - Select Operator to assign Operator privileges.
   - Select Administrator to assign Administrator privileges.
   - NOTE: The privileges these types of users have to use the features and functions in the Ballot Now application are described in User Privileges on page 18.
5 If you are adding a new user, in the User Name field, using at least 6 characters but no more than 12 characters, type the name the user must type into the Ballot Now Login window (see page 16).

NOTE: The user name must be unique to the Ballot Now application. The user name is case-sensitive, so type uppercase and lowercase letters exactly.

6 In the Password field, using at least 6 characters, but no more than 12 characters, type the password the user must type into the Ballot Now Login window.

NOTE: The password is case-sensitive, so type uppercase and lowercase letters exactly.

7 In the Reenter Password field, type the same password again (see Figure 7-7).

NOTE: The password is case-sensitive, so type uppercase and lowercase letters exactly.

8 Click [ ] to save your changes to the Add User window and close it.

Notes about adding a user

✓ If the User ID you typed in the User Name field of the Add User window is already defined as a User ID in the Ballot Now application, the message shown in Figure 7-8 appears.

1 Click [ ] in the dialog box.
2 Define a different user name in the Add User window, or click [ ] in the Add User window.
Deleting a User

When necessary, an Administrator can delete a Ballot Now user.

Steps for: Deleting a user

1. From the Admin menu, choose Login. The Ballot Now login window appears.
2. In the Ballot Now login window, log into Ballot Now as an Administrator user.
3. From the Admin menu, choose Delete User (see Figure 7-9). The Remove User window appears (see Figure 7-10).
4. Select the User Id of the user you want to delete. The arrowhead points to the User Id that is currently selected for deleting.
5. Click to select. The Remove User dialog box appears with the user's name displayed (see Figure 7-11).
6. Click to remove the user displayed in the Remove User window.
Chapter 8

Reports

Main Topics

Overview, this page. | Scanned Ballots By Batch Report on page 110.
---|---

You will use the commands in the Reports menu (see Figure 8-1) to view and print reports for a particular Election.

In a report window you can:

- Scroll through the report to view all its pages on the screen.
- Send a copy of the report to the system printer on 8½" x 11" paper (see Printing a report on page 100).
- Export the report to a variety of file formats (see Exporting a report to a file on page 101).

Figure 8-1 Reports menu.

Overview

Ballot Now reports include:

- **Election** report — Election name, Ballot Now state (Opened, Closed), jurisdiction, date, MBB serial number, public counter, Ballot Now private counter, and total number of scan batches
- **Scan Batch Report** report — for each page of the ballots in a scan batch, lists whether Ballot Now accepted or rejected the page.
- **Scanned Ballots by Precinct** report — for each precinct, the scan batch IDs and numbers of scanned ballots that are unresolved, resolved, written to the MBB, and not yet processed; sorted by precinct
- **Scanned Ballots by Batch** report — for each scan batch, the scan batch ID, the user name, date and time associated with the scan batch, and numbers of scanned ballots that are unresolved, resolved, written to the MBB, and not yet processed; sorted by scan batch number

- **Unresolved Ballots** report — for each scan batch, the scan batch ID, the user name, date and time associated with the scan batch, and number of unresolved and resolved ballots; sorted by scan batch

- **Printed Ballots by Precinct** report — for each printing session, the precinct name and the date, time, user name, starting serial number, ballot type, language, and number of ballots printed; sorted by precinct

- **Certified Write-ins** report — list of certified write-ins entered for all write-in contests

- **Audit Trail** report — Ballot Now transactions performed by the user

The Election MBB does not need to be installed in the PC Card drive in order to view or print Ballot Now reports. However, you must open the Election you want to work with before you can view or print its reports (see Selecting an Election to work with on page 22).

While an Election has a status of Opened in the Election window, the reports for it are preliminary. Final, or official, reports for the Election ballots scanned by the Ballot Now application can be viewed and printed after the Election is Closed in the Election window.

When you view or print a Ballot Now report, you can determine:

- the **Status** of the report at the time the report was generated and
- the **Election Type** contained on the MBB.

The definitions for the **Status** of the election are:

- **Unofficial** - Indicates that the election has not been closed in Ballot Now.
- **Official** - Indicates that the election has been closed Ballot Now.

The definitions for the **Election Type** are:

- **Test** - Indicates the election database on the MBB was for testing.
- **Election** - Indicates the election database on the MBB was for the Election.

The **Status** and the **Election Type** for any report you view or print become part of the report's title—appearing above the report's title, or to the right of the report title.

For example, a Ballot Now report for a test database will have the words

**Unofficial Test**

associated with the report title.

Similarly, a Ballot Now report for an Election database that has not been closed yet will show

**Unofficial**

associated with the report title.

Then, when the Ballot Now Election database is closed in Ballot Now, the report title will show

**Official**

associated with the report title.
Summary of Available Reports

The reports available in the Reports menu are described in Table 8-1.

Table 8-1 Reports available in the Reports menu.

<table>
<thead>
<tr>
<th>Election Report</th>
<th>Scan Batch Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Election Report report shows information about the Election (derived from the Election MBB) and about the ballots scanned. It lists:</td>
<td>The Scan Batch Report report lists whether Ballot Now accepted or rejected the pages of the ballots in the scan batch.</td>
</tr>
<tr>
<td>• Election name</td>
<td>• position in the batch</td>
</tr>
<tr>
<td>• Election state:</td>
<td>• precinct name</td>
</tr>
<tr>
<td>• Opened</td>
<td>• page number</td>
</tr>
<tr>
<td>• Closed</td>
<td>• serial number</td>
</tr>
<tr>
<td>• jurisdiction name</td>
<td>• language</td>
</tr>
<tr>
<td>• Election date</td>
<td>• status</td>
</tr>
<tr>
<td>• MBB serial number</td>
<td>• Rejected</td>
</tr>
<tr>
<td>Totals listed are:</td>
<td>• Accepted</td>
</tr>
<tr>
<td>• public counter</td>
<td>• if the ballot image was rejected, the reason it was rejected</td>
</tr>
<tr>
<td>• Ballot Now private counter</td>
<td></td>
</tr>
<tr>
<td>• number of scan batches</td>
<td></td>
</tr>
<tr>
<td>• total accepted ballots</td>
<td></td>
</tr>
</tbody>
</table>

See on page 102.

See Scan Batch Report on page 104.
Table 8-1 Reports available in the Reports menu. (Continued)

<table>
<thead>
<tr>
<th>Scanned Ballots by Precinct</th>
</tr>
</thead>
</table>


The Scanned Ballots by Precinct report shows information about the batches of ballots scanned, sorted by precinct. For each precinct's scanned ballots, it lists the total number of ballots processed by Ballot Now for the Election.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For each precinct, lists:
- precinct name
- batch ID
- number of ballots scanned in each scan batch
- number of unresolved ballots in each scan batch
- number of resolved ballots in each scan batch
- number of resolved ballots in each scan batch that have been written to the MBB
- number of ballots in each scan batch that are not yet processed

Totals listed for each precinct are:
- ballots scanned
- unresolved ballots
- resolved ballots
- written to MBB
- not processed

<table>
<thead>
<tr>
<th>Scanned Ballots by Batch</th>
</tr>
</thead>
</table>


The Scanned Ballots by Batch report lists the number of ballots processed by the system for an Election, sorted by Batch ID.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For each batch, lists:
- batch ID
- precinct name and:
  - username of the user logged in to Ballot Now when ballots were scanned
  - date ballots were scanned
  - time of day ballots were scanned
- number of ballots scanned in each precinct
- number of unresolved ballots in each precinct
- number of resolved ballots in each precinct
- number of resolved ballots in each precinct that have been written to the MBB
- number of ballots in each precinct that are not yet processed

Totals listed for each batch are:
- ballots scanned
- unresolved ballots
- resolved ballots
- written to MBB
- not processed
Unresolved Ballots


The Unresolved Ballots report lists the ballots resolved by the user logged in to Ballot Now, sorted by batch ID.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For each batch, lists:
- batch ID
- username of the user logged in to Ballot Now when ballots were scanned
- date ballots were scanned
- time of day ballots were scanned
- number of ballots in each scan batch
- number of unresolved ballots in each scan batch
- number of resolved ballots in each scan batch
- number of ballots in each scan batch that are not yet processed

Totals listed for each batch are:
- ballots scanned
- unresolved ballots
- resolved ballots
- not processed

Printed Ballots by Precinct

See Printed Ballots By Precinct Report on page 115.

The Printed Ballots by Precinct report shows the record of ballots printed by the user logged in to Ballot Now, sorted by precinct. If serial numbers are printed on the ballots, the beginning number for serial number is listed.

This report is updated every time it is run.

For each precinct, lists:
- precinct name
- date ballots were printed
- time of day ballots were printed
- username of the user logged in to Ballot Now
- starting serial number (if serial numbers were used)
- type of ballots printed (Election, Test, Sample)
- language printed on the ballots (English or secondary language)
- number of ballots printed

Totals listed are:
- ballots printed for the precinct
- ballots printed for the Election

Table 8-1 Reports available in the Reports menu. (Continued)
### Table 8-1  Reports available in the Reports menu. (Continued)

<table>
<thead>
<tr>
<th>Reports available in the Reports menu.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Certified Writeins</strong></td>
</tr>
<tr>
<td>The Certified Writeins report lists the write-ins for each contest, sorted by contest appearance on the ballot.</td>
</tr>
<tr>
<td>For each contest, lists:</td>
</tr>
<tr>
<td>× contest name</td>
</tr>
<tr>
<td>× write-in name (including the default write-in name &quot;Uncertified&quot;)</td>
</tr>
<tr>
<td><strong>Audit Trail</strong></td>
</tr>
<tr>
<td>See Audit Trail Report on page 119.</td>
</tr>
<tr>
<td>The Audit Trail report lists the transactions users performed in Ballot Now.</td>
</tr>
<tr>
<td>Transactions listed are:</td>
</tr>
<tr>
<td>× transaction record number</td>
</tr>
<tr>
<td>× username of the user logged in to Ballot Now when transaction occurred</td>
</tr>
<tr>
<td>× date transaction occurred</td>
</tr>
<tr>
<td>× time of day transaction occurred</td>
</tr>
<tr>
<td>× code for the transaction</td>
</tr>
<tr>
<td>× description of the transaction</td>
</tr>
<tr>
<td>× details of the transaction</td>
</tr>
</tbody>
</table>
Headers printed on scanned ballot reports

The information that appears at the top of each page of a report is described in Table 8-2.

Table 8-2  Heading information at the top of each page of a report.

<table>
<thead>
<tr>
<th>Report name</th>
<th>The name of the report.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Election name</td>
<td>The name of the Election.</td>
</tr>
<tr>
<td>Jurisdiction name</td>
<td>The name of the Jurisdiction.</td>
</tr>
<tr>
<td>Election date</td>
<td>The date of the Election.</td>
</tr>
</tbody>
</table>

Footers printed on scanned ballot reports

The information that appears at the bottom of each page of a report is described in Table 8-3.

Table 8-3  Footer information at the bottom of each page of a report.

<table>
<thead>
<tr>
<th>print date/time</th>
<th>Shows the date and time the report was printed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, Printed On: 2/25/00 4:07 PM.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>page number</th>
<th>Shows the number of the current page and the number of total pages in the report.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, Page 1 of 8.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>database filepath</th>
<th>Shows the directory path on the computer's hard drive to the Ballot Now Election database from which the report was generated.</th>
</tr>
</thead>
</table>
Steps for: Viewing a report window

☑ To view a report:
1. From the Reports menu, select the report you want to view.
2. Use the scroll bars in the report window to view different pages of the report.

☑ To close the window:
• Click [ ].

Steps for: Printing a report

☑ To send a copy of the report to the system printer:
1. From the Reports menu, select the report you want to print.
2. Click the printer icon [ ] at the top of the report window.
   The Print window appears (see Figure 8-2).
3. In the Print window, select the pages you want to print.
4. Click [ ] in the Print window.
   The report will print at the system printer.

Figure 8-2 Print window.
Steps for: Exporting a report to a file

To export the report to a file:

1. From the Reports menu, select the report you want to export to a file.
2. Click the export icon at the top of the report window. The Export window appears (see Figure 8-3).
3. From the Format list box, select the file format for the report file.
4. From the Destination list box, select where the file should be saved.
5. Click in the Export window. The Export Options window appears (see Figure 8-4).
6. In the Export Options window, select which pages you want to print.
7. Click in the Export Options window. The Choose export file window appears (see Figure 8-5).
8. In the Choose export file window, navigate to the destination for the file.
9. Click .
Election Report

The Election Report report shows information about the Election (derived the Election MBB) and about the ballots scanned.

The Election Report report shows:

- Election name
- Election state:
  - Opened
  - Closed
- Jurisdiction name
- Election date
- MBB serial number

Totals listed are:

- Public counter
- Ballot Now private counter
- Number of scan batches
- Total accepted ballots

Information in the Election Report report

The Election Report report contains the information listed in Table 8-4.

<table>
<thead>
<tr>
<th>Table 8-4 Election Report report sections.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Header</strong></td>
</tr>
<tr>
<td><strong>Election Name</strong></td>
</tr>
<tr>
<td><strong>Election State</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Jurisdiction Name</strong></td>
</tr>
<tr>
<td><strong>Election Date</strong></td>
</tr>
<tr>
<td><strong>MBB Serial Number</strong></td>
</tr>
<tr>
<td><strong>Public Counter</strong></td>
</tr>
<tr>
<td><strong>Ballot Now Private Counter</strong></td>
</tr>
<tr>
<td><strong>Number of Scan Batches</strong></td>
</tr>
<tr>
<td><strong>Total Accepted Ballots</strong></td>
</tr>
<tr>
<td><strong>Footer</strong></td>
</tr>
</tbody>
</table>
Opening the report

To open the Election Report window:
- From the Reports menu, select Election Report (see Figure 8-6).

The Election Report window appears (see Figure 8-7).

Example of the Election Report window

An example of the Election Report window is shown in Figure 8-7.

Example of the Election Report report

Please see Appendix B for an example printout of the Election Report report.
Scan Batch Report

The Scan Batch Report report lists whether Ballot Now accepted or rejected the pages of the ballots in the scan batch.

For each ballot image scanned in the batch, the Scan Batch Report report shows:

- position in the batch
- precinct name
- page number
- serial number
- language
- status
  - Rejected
  - Accepted
- if the ballot image was rejected, the reason it was rejected

Totals listed are:

- total ballots accepted
- number of ballot images rejected

Information in the Scan Batch Report report

The Scan Batch Report report contains the information listed in Table 8-5.

<table>
<thead>
<tr>
<th>Table 8-5</th>
<th>Scan Batch Report information for the scan batch.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Header</strong></td>
<td>Standard header described in Heading information at the top of each page of a report. on page 99.</td>
</tr>
<tr>
<td><strong>Batch</strong></td>
<td>The batch number (batch ID).</td>
</tr>
<tr>
<td><strong>Batch Notes</strong></td>
<td>The notes for the batch that were entered in the Enter Scan Batch Notes field of the Scan Ballot window.</td>
</tr>
<tr>
<td><strong>Image column</strong></td>
<td>The number of the ballot image.</td>
</tr>
<tr>
<td><strong>Precinct column</strong></td>
<td>The name of the precinct that was on ballot.</td>
</tr>
<tr>
<td><strong>Page column</strong></td>
<td>The page number that was on the ballot page that was scanned.</td>
</tr>
<tr>
<td><strong>Serial # column</strong></td>
<td>The serial number that was on the ballot. A zero (0) appears in this column if no serial number was on the ballot.</td>
</tr>
<tr>
<td><strong>Language column</strong></td>
<td>The language that was on the ballot.</td>
</tr>
<tr>
<td><strong>Status column</strong></td>
<td>The status of the processed image:</td>
</tr>
<tr>
<td></td>
<td>- Accepted — Ballot Now processed the ballot image.</td>
</tr>
<tr>
<td></td>
<td>- Rejected — Ballot Now did not process the ballot image (see the Description column).</td>
</tr>
<tr>
<td><strong>Description column</strong></td>
<td>If Rejected appears in the Status column, displays the reason the image was rejected by Ballot Now:</td>
</tr>
<tr>
<td></td>
<td>- Sample Ballot</td>
</tr>
<tr>
<td></td>
<td>- Unidentified Form</td>
</tr>
<tr>
<td></td>
<td>- Ballot Not From Selected Election</td>
</tr>
</tbody>
</table>
Table 8-5 Scan Batch Report information for the scan batch. (Continued)

<table>
<thead>
<tr>
<th>Ballot Summary Data</th>
<th>The total ballots accepted in the scan batch (all pages in each ballot comprise one ballot). The number of ballot images rejected in the scan batch.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Ballots Accepted</td>
<td></td>
</tr>
<tr>
<td>Images Rejected</td>
<td></td>
</tr>
<tr>
<td>Footer</td>
<td>Standard footer described in Footer information at the bottom of each page of a report, on page 99.</td>
</tr>
</tbody>
</table>

Opening the report

To open the Scan Batch Report window from the Reports menu:

1. From the Reports menu, select Scan Batches (see Figure 8-8).
   The Scan Batch Management window appears (see Figure 8-9).
2. In the Scan Batch Management window, select the batch number you want to work with.
   The ➤ arrowhead points to the Batch that is currently selected.

3. To view the Scan Batch Report report for the selected scan batch, click .
   The Scan Batch Report window appears (see Figure 8-10 on page 106).
Example of the Scan Batch Report window

An example of the Scan Batch Report window is shown in Figure 8-10.

![Scan Batch Report Window](image)

**Figure 8-10 Scan Batch Report window.**

Please see Appendix B for an example printout of the Scan Batch Report report.
Scanned Ballots By Precinct Report

The Scanned Ballots by Precinct report shows information about the batches of ballots scanned, sorted by precinct. For each precinct's scanned ballots it lists the total number of ballots processed by Ballot Now for the Election.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For the scan batches in each precinct, the Scanned Ballots By Precinct report shows:

- precinct name
- batch ID
- number of ballots scanned in each scan batch
- number of unresolved ballots in each scan batch
- number of resolved ballots in each scan batch
- number of resolved ballots in each scan batch that have been written to the MBB
- number of ballots in each scan batch that are not yet processed

Totals listed for each precinct are:

- ballots scanned
- unresolved ballots
- resolved ballots
- written to MBB
- not processed
Information in the Scanned Ballots By Precinct report

- The primary sort order for the Scanned Ballots By Precinct report is precinct.
- The secondary sort order for the Scanned Ballots By Precinct report is Batch ID.

The Scanned Ballots By Precinct report contains the information listed in Table 8-6.

<table>
<thead>
<tr>
<th>Table 8-6 Scanned Ballots By Precinct report sections</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Header</strong></td>
</tr>
<tr>
<td><strong>Precinct Name</strong></td>
</tr>
<tr>
<td><strong>Batch</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td><strong>Unresolved</strong></td>
</tr>
<tr>
<td><strong>Resolved</strong></td>
</tr>
<tr>
<td><strong>Written to MBB</strong></td>
</tr>
<tr>
<td><strong>Not processed</strong></td>
</tr>
<tr>
<td><strong>Summary Data</strong></td>
</tr>
<tr>
<td><strong>Total Ballots</strong></td>
</tr>
<tr>
<td><strong>Resolved Ballots</strong></td>
</tr>
<tr>
<td><strong>Unresolved Ballots</strong></td>
</tr>
<tr>
<td><strong>Written</strong></td>
</tr>
<tr>
<td><strong>Not Processed</strong></td>
</tr>
<tr>
<td><strong>Footer</strong></td>
</tr>
</tbody>
</table>
Opening the report

✔️ To open the Scanned Ballots By Precinct window:
  • From the Reports menu, select Scanned Ballots By Precinct (see Figure 8-11).
  The Scanned Ballots By Precinct window appears (see Figure 8-12).

Example of the Scanned Ballots By Precinct window

An example of the Scanned Ballots By Precinct window is shown in Figure 8-12.

Example of the Scanned Ballots By Precinct report

Please see Appendix B for an example printout of the Scanned Ballots By Precinct report.
Scanned Ballots By Batch Report

The **Scanned Ballots by Batch** report lists the number of ballots processed by the system for an Election, sorted by Batch ID.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For each scan batch, the **Scanned Ballots By Batch** report shows:

- **batch ID**
- username of the user logged in to Ballot Now when ballots were scanned
- date ballots were scanned
- time of day ballots were scanned
- precinct name
- number of ballots scanned in each precinct
- number of unresolved ballots in each precinct
- number of resolved ballots in each precinct
- number of resolved ballots in each precinct that have been written to the MBB
- number of ballots in each precinct that are not yet processed

Totals listed for each batch are:

- ballots scanned
- unresolved ballots
- resolved ballots
- written to MBB
- not processed
Information in the Scanned Ballots By Batch report

- The primary sort order for the Scanned Ballots By Batch report is Batch ID.
- The secondary sort order for the Scanned Ballots By Batch report is precinct name.

The Scanned Ballots By Batch report contains the information listed in Table 8-7.

Table 8-7  Scanned Ballots By Batch report sections.

<table>
<thead>
<tr>
<th>Header</th>
<th>Standard header described in Heading information at the top of each page of a report on page 99.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch</td>
<td>The scan batch ID.</td>
</tr>
<tr>
<td>user</td>
<td>The username of the user logged in to Ballot Now when ballots were scanned.</td>
</tr>
<tr>
<td>date</td>
<td>The date ballots were scanned.</td>
</tr>
<tr>
<td>time</td>
<td>The time of day ballots were scanned.</td>
</tr>
<tr>
<td>Precinct Name</td>
<td>The names of the precincts in the scan batch.</td>
</tr>
<tr>
<td>Total</td>
<td>The number of ballots in the scan batch.</td>
</tr>
<tr>
<td>Unresolved</td>
<td>The number of unresolved ballots in the scan batch.</td>
</tr>
<tr>
<td>Resolved</td>
<td>The number of resolved ballots in the scan batch.</td>
</tr>
<tr>
<td>Written to MBB</td>
<td>The number of resolved ballots in each scan batch that have been written to the MBB.</td>
</tr>
<tr>
<td>Not Processed</td>
<td>The number of ballots in the scan batch that are not yet processed.</td>
</tr>
<tr>
<td>Totals</td>
<td>Totals for the Total, Unresolved, Resolved and Not Processed columns.</td>
</tr>
<tr>
<td>Summary Data</td>
<td>The Summary Data table shows:</td>
</tr>
<tr>
<td>Total Ballots</td>
<td>Total scanned ballots in all scan batches.</td>
</tr>
<tr>
<td>Resolved Ballots</td>
<td>Total resolved ballots in all scan batches.</td>
</tr>
<tr>
<td>Unresolved Ballots</td>
<td>Total unresolved ballots in all scan batches.</td>
</tr>
<tr>
<td>Written to Card</td>
<td>Total ballots written to the MBB in all scan batches.</td>
</tr>
<tr>
<td>Non Processed</td>
<td>Total ballots scanned but rejected by Ballot Now in all scan batches.</td>
</tr>
<tr>
<td>Footer</td>
<td>Standard footer described in Footer information at the bottom of each page of a report on page 99.</td>
</tr>
</tbody>
</table>

Scanned Ballots By Batch Report

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Opening the report

To open the *Scanned Ballots By Batch* window:

- From the Reports menu, select Scanned Ballots By Batch (see Figure 8-13).

The Scanned Ballots By Batch window appears (see Figure 8-14).

Example of the Scanned Ballots By Batch window

An example of the *Scanned Ballots By Batch* window is shown in Figure 8-14.

Example of the Scanned Ballots By Batch report

Please see Appendix B for an example printout of the *Scanned Ballots By Batch* report.
Unresolved Ballots Report

The Unresolved Ballots report lists the ballots resolved by the user logged in to Ballot Now, sorted by batch ID.

This report is updated every time it is run. For example, after first scanning ballots, there may be a number of unresolved ballots, and the report will reflect these. However, after all ballots are resolved, the report will not show any unresolved ballots.

For each scan batch, the Unresolved Ballots report shows:

- batch ID
- username of the user logged in to Ballot Now when ballots were scanned
- date ballots were scanned
- time of day ballots were scanned
- number of ballots in each scan batch
- number of unresolved ballots in each scan batch
- number of resolved ballots in each scan batch
- number of ballots in each scan batch that are not yet processed

Totals listed are:
- ballots scanned
- unresolved ballots
- resolved ballots
- not processed

Information in the Unresolved Ballots report

- The sort order for the Unresolved Ballots report is Batch ID.

The Unresolved Ballots report contains the information listed in Table 8-8.

<table>
<thead>
<tr>
<th>Table 8-8</th>
<th>Unresolved Ballots report sections.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Standard header described in Heading information at the top of each page of a report, on page 99.</td>
</tr>
<tr>
<td>Batch</td>
<td>The scan batch ID.</td>
</tr>
<tr>
<td>User</td>
<td>The username of the user logged in to Ballot Now when ballots were scanned.</td>
</tr>
<tr>
<td>Date</td>
<td>The date ballots were scanned.</td>
</tr>
<tr>
<td>Time</td>
<td>The time of day ballots were scanned.</td>
</tr>
<tr>
<td>Total</td>
<td>The number of ballots in the scan batch.</td>
</tr>
<tr>
<td>Unresolved</td>
<td>The number of unresolved ballots in the scan batch.</td>
</tr>
<tr>
<td>Resolved</td>
<td>The number of resolved ballots in the scan batch.</td>
</tr>
<tr>
<td>Not Processed</td>
<td>The number of ballots in the scan batch that are not yet processed.</td>
</tr>
<tr>
<td>Totals</td>
<td>Totals for the Total, Unresolved, Resolved and Not Processed columns.</td>
</tr>
<tr>
<td>Footer</td>
<td>Standard footer described in Footer information at the bottom of each page of a report, on page 99.</td>
</tr>
</tbody>
</table>
Opening the report

To open the **Unresolved Ballots** window:

- From the **Reports** menu, select **Unresolved Ballots** (see Figure 8-15).

The Unresolved Ballots window appears (see Figure 8-16).

Example of the Unresolved Ballots window

An example of the **Unresolved Ballots** window is shown in Figure 8-16.

Example of the Unresolved Ballots report

Please see **Appendix B** for an example printout of the **Unresolved Ballots** report.
Printed Ballots By Precinct Report

The Printed Ballots by Precinct report shows the record of ballots printed by the user logged in to Ballot Now, sorted by precinct. If serial numbers are printed on the ballots, the beginning number for serial number is listed.

This report is updated every time it is run.

For each precinct, the Printed Ballots By Precinct report shows:
- precinct name
- date ballots were printed
- time of day ballots were printed
- username of the user logged in to Ballot Now
- starting serial number (if serial numbers were used)
- type of ballots printed (Election, Test, Sample)
- language printed on the ballots (English or secondary language)
- number of ballots printed

Totals listed are:
- ballots printed for the precinct
- ballots printed for the Election

Information in the Printed Ballots By Precinct report
- The sort order for the Printed Ballots By Precinct report is precinct.

The Printed Ballots By Precinct report contains the information listed in Table 8-9.

Table 8-9 Printed Ballots By Precinct report sections

<table>
<thead>
<tr>
<th>Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Precinct</td>
<td>The name of the precinct.</td>
</tr>
<tr>
<td>Print Date</td>
<td>The date and time of day ballots were printed.</td>
</tr>
<tr>
<td>User</td>
<td>The username of the user logged in to Ballot Now when the ballots were printed.</td>
</tr>
<tr>
<td>Starting SN</td>
<td>The starting serial number (if serial numbers were used).</td>
</tr>
<tr>
<td>Type</td>
<td>The type of ballots printed (Election, Test, Sample).</td>
</tr>
<tr>
<td>Language</td>
<td>The language printed on the ballots (English or secondary language).</td>
</tr>
<tr>
<td># Printed</td>
<td>The number of ballots printed.</td>
</tr>
<tr>
<td>Footer</td>
<td>Standard footer described in Footer information at the bottom of each page of a report. on page 99.</td>
</tr>
</tbody>
</table>
Opening the report

To open the Printed Ballots By Precinct window:

- From the Reports menu, select Printed Ballots (see Figure 8-17).

The Printed Ballots By Precinct window appears (see Figure 8-18).

Example of the Printed Ballots By Precinct window

An example of the Printed Ballots By Precinct window is shown in Figure 8-18.

Example of the Printed Ballots By Precinct report

Please see Appendix B for an example printout of the Printed Ballots By Precinct report.
Certified Writeins Report

The **Certified Writeins** report lists the write-ins for each contest, sorted by contest appearance on the ballot.

For each contest, the **Certified Writeins** report shows:
- contest name
- write-in name (including the default write-in name “Uncertified”)

**Information in the Certified Writeins report**

- The sort order for the **Certified Writeins** report is contest appearance on the ballot.

The **Certified Writeins** report contains the information listed in **Table 8-10**.

**Table 8-10 Certified Writeins report sections.**

<table>
<thead>
<tr>
<th>Header</th>
<th>Standard header described in <strong>Heading Information at the top of each page of a report.</strong> on page 99.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contest Title</td>
<td>The name of the contest in which the write-in appeared on a ballot.</td>
</tr>
<tr>
<td>Certified Writeins</td>
<td>The write-in name.</td>
</tr>
<tr>
<td>Footer</td>
<td>Standard footer described in <strong>Footer information at the bottom of each page of a report.</strong> on page 99.</td>
</tr>
</tbody>
</table>

**Opening the report**

- To open the **Certified Writeins** window:
  - From the **Reports** menu, select **Certified Writeins** (see Figure 8-19).
  - The **Certified Writeins** window appears (see Figure 8-20 on page 118).
Example of the Certified Writeins window

An example of the Certified Writeins window is shown in Figure 8-20.

![Figure 8-20 Certified Writeins window.](image)

Example of the Certified Writeins report

Please see Appendix B for an example printout of the Certified Writeins report.
Audit Trail Report

The Audit Trail report lists the transactions users performed in Ballot Now. Transactions listed in the Audit Trail report are:

- transaction record number
- username of the user logged in to Ballot Now when transaction occurred
- date transaction occurred
- time of day transaction occurred
- code for the transaction
- description of the transaction
- details of the transaction

Information in the Audit Trail report

- The sort order for the Audit Trail report is **date and time transaction occurred**.

The Audit Trail report contains the information listed in **Table 8-11**.

<table>
<thead>
<tr>
<th>Table 8-11 Audit Trail report sections.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Header</strong></td>
</tr>
<tr>
<td><strong>Record</strong></td>
</tr>
<tr>
<td><strong>Userld</strong></td>
</tr>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td><strong>Time</strong></td>
</tr>
<tr>
<td><strong>Code</strong></td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td><strong>Detail</strong></td>
</tr>
<tr>
<td><strong>Footer</strong></td>
</tr>
</tbody>
</table>

Opening the report

✓ To open the Audit Trail window:

- From the Reports menu, select Audit Trail (see Figure 8-21).

The Audit Trail window appears (see Figure 8-22 on page 120).

![Figure 8-21 Reports menu showing the Audit Trail choice.](image-url)
Example of the Audit Trail window

An example of the Audit Trail window is shown in Figure 8.22.

![Audit Trail Window](image)

**Figure 8.22 Audit Trail window.**

Example of the Audit Trail report

Please see Appendix B for an example printout of the Audit Trail report.
Chapter 9

Closing an Election

Main Topics

| Changing an Election's Status to Closed on page 122. |
| Deleting an Election on page 123. |

When all ballots for an Election have been processed in Ballot Now, the Election can be closed so that the results can be transferred to the Tally application.

The proper MBB must be present when an Election is closed. The MBB is written with all pending CVRs and other information, and then a record is written to flag this MBB as closed.

The closed Election includes all audit information and reporting information as well as Election setup and administrative information.

Use of this function is logged in the Ballot Now application and the MBB audit log.

In order to close an Election in the Ballot Now application, you will use the Close Election command in the Election menu (see Figure 9-1).

![Figure 9-1 Election menu](image)
Changing an Election's Status to Closed

When all data processing on an Election has been completed in the Ballot Now application, the Election can be closed so that the Election's data can no longer be modified in the Ballot Now application. When you have closed an Election, its status changes to Closed in the Election window.

In order to close an Election, all post-scan processing must be complete. Specifically:
- Resolve write-ins
- Resolve unresolved ballots
- Write ballots to MBB

Steps for: Closing an Election

1. To close an Election:
   1. Open the Election you want to close as described in Selecting an Election to work with on page 22.
   2. Verify that the name of the Election you want to close now appears in the title of the Ballot Now window.
   3. From the Election menu, select Close Election (see Figure 9-2).
      The Close Election window appears (see Figure 9-3).
   4. Click [ ] in the Close Election window to close the Election and change its state to Closed.

After the Election is closed, the MBB may be tabulated in the eSlate Electronic Voting System Tally System application.

Notes about closing an Election

1. If you select Close Election from the Election menu before all the ballots in the Election have been resolved and written to the MBB, the message shown in Figure 9-4 appears.
   1. Click [ ] in the dialog box.
   2. Resolve remaining unresolved ballots in the Resolve Ballot window and save the CVRs to the MBB (see Chapter 6 Resolving and Recording Scanned Ballots, page 65).
Deleting an Election

An administrator can delete an Election from Ballot Now.

Steps for Removing an Election from Ballot Now

To permanently delete an Election database from Ballot Now:

1. From the Admin menu, choose Login.
   The Ballot Now Login window appears.
2. In the Ballot Now Login window, log into Ballot Now as an Administrator user.
3. Open the Election you want to delete as described in Selecting an Election to work with on page 22.
4. If the Election has the state Closed, you can delete it now. If not, follow the steps in Closing an Election on page 22 to close the Election, then repeat Step 3.
5. Verify that the name of the Election you want to delete now appears in the title of the Ballot Now window.
6. From the Election menu, select Delete Election (see Figure 9.5).
   The Confirmation window appears (see Figure 9.6).
7. Click [ ] in the Confirmation dialog box to delete the Election database.
**Glossary of Terms**

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>A User with special privileges for interacting with the Ballot Now application.</td>
</tr>
<tr>
<td>Ballot Now MBB</td>
<td>An Election MBB that was created for paper ballots with the Ballot Origination Software System (BOSS) application.</td>
</tr>
<tr>
<td>Ballot Styles</td>
<td>A ballot style defines a unique ballot to be printed. Every precinct ballot is linked to one ballot style, and there may be several precincts with the same ballot style. The ballot style information is carried on the MBB.</td>
</tr>
<tr>
<td>CVR</td>
<td>Cast Vote Record. Contains information on how contests were voted, including any write-in resolutions that were needed.</td>
</tr>
<tr>
<td>Election Ballot</td>
<td>A real Election ballot that will be given to a voter. Election ballots can contain a serial number bar code to prevent more than one copy of them being counted.</td>
</tr>
<tr>
<td>Election ID</td>
<td>An election identification code that is unique for every election. The Election ID is used internally by the software application.</td>
</tr>
<tr>
<td>Election MBB</td>
<td>An MBB used to generate ballots for election voting and for recording election results in the Tally application.</td>
</tr>
<tr>
<td>MBB</td>
<td>Mobile Ballot Box. The MBB is a PCMCIA card that carries all Election information to and from individual polling places. Ballot Now reads the MBB to determine the number of ballot styles, and reads further information detailing the layout of the ballots. With this information, Ballot Now can print out paper ballots, and scan paper ballots for contest results. Ballot Now saves on the MBB the Cast Vote Records, and the MBB is then sent to Tally to complete the Election.</td>
</tr>
<tr>
<td>Operator</td>
<td>A User with reduced privileges for interacting with the Ballot Now application.</td>
</tr>
<tr>
<td>Private Counter</td>
<td>The count of CVRs written on this Ballot Now machine for all elections.</td>
</tr>
<tr>
<td>Public Counter</td>
<td>The count of CVRs written for this election.</td>
</tr>
<tr>
<td>Sample Ballot</td>
<td>A ballot printed as a sample of the real Election ballot. Sample ballots contain a special bar code which prevents them from being included in an MBB.</td>
</tr>
<tr>
<td>Scan Batch</td>
<td>A group of ballot pages to be scanned. Each scan batch has a system-assigned sequence number, and optionally, a user-defined name.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>A bar code number placed on the ballot stub and/or the ballot that uniquely identifies the ballot.</td>
</tr>
<tr>
<td>Test Ballot</td>
<td>A ballot printed to test the system before an Election.</td>
</tr>
<tr>
<td>Test MBB</td>
<td>An MBB used for election testing purposes, such as ballot proofing and Logic and Accuracy Tests (LATs).</td>
</tr>
<tr>
<td>User</td>
<td>Either an Operator or an Administrator.</td>
</tr>
</tbody>
</table>
Appendix A

Ballot Now Image Processor (BNIP)

Overview of BNIP

The Ballot Now Image Processor (BNIP) is a separate application that processes the ballot images saved by the scanner.

- When Ballot Now is started:
  - BNIP launches automatically
  - The Ballot Now and Ballot Now Image Processor taskbar buttons appear in the taskbar
  - BNIP requires no user interaction while the user is interacting with Ballot Now

- As soon as you click [ ] in the Scan Report window to save the data from the scan batch to the Election database on the computer's hard drive:
  - BNIP will begin processing images
  - As BNIP processes images, a Save Document taskbar button will flash momentarily on the taskbar

  NOTE: You will not be able to resolve the ballots from a scan batch until BNIP has finished processing the batch. You will be able to tell that BNIP has finished processing the images in the batch when the Save Document taskbar button no longer flashes on the taskbar.

- When you exit Ballot Now:
  - BNIP closes automatically

Ballot Now Image Processor window

Although no user interaction is required with BNIP, you can view the activity of BNIP in the Ballot Now Image Processor window. If an Election has been opened in Ballot Now:

- <Connected> appears in the title of the Ballot Now Image Processor window
- the date, time, image number, and statistics for each file processed by BNIP appear in the display field
- the number of ballots processed appears in the bottom of the window
To view the **Ballot Now Image Processor** window:

1. Click the **Ballot Now Image Processor** taskbar button.

The **Ballot Now Image Processor** window appears (see **Figure A-1** on page 128).

![Figure A-1 Ballot Now Image Processor window appearance when an Election is open.](image)

2. You should never click the **ShutDown** button in the **Ballot Now Image Processor** window, as BNIP must remain active while you are using Ballot Now.

   **NOTE:** If you accidentally close BNIP, you can start it again by:
   - launching it from the directory `C:\Program Files\Hart InterCivic\Ballot Now` directory,
   - OR -
   - exiting Ballot Now and starting Ballot Now again.

To minimize the **Ballot Now Image Processor** window:

1. Right-click the **Ballot Now Image Processor** taskbar button.
2. Select **Minimize** from the drop-down menu.

The **Ballot Now Image Processor** window minimizes.

**Notes about the Ballot Now Image Processor window**

If no Election is open in Ballot Now, the **Ballot Now Image Processor** window title shows `<Not Connected>` (see **Figure A-2**).

![Figure A-2 Ballot Now Image Processor window appearance when no Election is open.](image)
Appendix B

Sample Reports

Reports Available in the Report Menu

- Election report — Election name, Ballot Now state (New, Opened, Closed), jurisdiction, date, MBB serial number, public counter, Ballot Now private counter, and total number of scan batches
- Scan Batch Report report — lists how Ballot Now recognized the scanned ballots in a scan batch
- Scanned Ballots by Precinct report — number of unresolved and resolved ballots in precincts sorted by precinct
- Scanned Ballots by Batch report — number of unresolved and resolved ballots in precincts sorted by scan batch number
- Unresolved Ballots report — number of unresolved and resolved ballots by scan batch
- Printed Ballots by Precinct report — date and time, type, language, and number of ballots printed
- Certified Writeins report — write-ins detected and/or resolved
- Audit Trail report — Ballot Now transactions performed by the user

Other Reports

The Complete Scan Batch Report is available when you click:

- ![Scan Report](Image) in the Scan Report window, or
- ![Scan Batch Management](Image) in the Scan Batch Management window
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