eSlate™ Electronic Voting System

TALLY SOFTWARE TRAINING MANUAL

BOSS Version 2.8 compatible
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INTRODUCTION

What is Tally?
Tally is a software application that reads, stores, and tabulates the Cast Vote Records™ (CVRs) from Hart InterCivic's Ballot Origination Software System's Mobile Ballot Boxes (MBBs)™. The MBBs contain Cast Vote Records captured by the eSlate Precinct Voting System™ (PVS) and/or scanned Ballot Now™ paper ballots and audit trail data that authenticates the CVRs. Tally is initialized with the locked Ballot Origination Software System (BOSS) database that was used to create the election. This initialization "programs" Tally for tabulation. The only required task prior to beginning the tabulation process is to input any approved write-in candidate names. Tally counts vote totals for Test Tabulations, Absentee Voting, Early Voting, and Election Day. Tally produces official results reports and data.

This Document:
This Document is a training manual designed to guide operator training, and it is meant for use in conjunction with the Tally System Operations Manual. This training manual is meant for both initial training with Hart InterCivic training specialists, and as a reference to supplement the operations manual once training is complete.

Objectives
Through this course the trainee will:
- Tabulate CVRs recorded on eSlate system MBBs,
- Generate unofficial reports and official reports,
- Edit write-ins,
- Check provisional ballots,
- Include absentee and manual votes in the tabulation,
- Produce tabulation reports,
- Close an election, and
- View procedures for backing up election databases.

Take Note:
- All steps that refer to a button or menu on the screen have the button in bold (i.e.: Save, Close, OK).
- All steps that refer to a key on the keyboard have the key underlined (i.e.: Ctrl, Shift, Enter).
- All steps that refer to a mouse click have the word(s) italicized (i.e.: click, right click, double click). The word click refers to a left click.
- A refers to areas within the Training Manual that contain more information regarding the topic.
- Tally prints a hard copy, real-time, Audit Log documenting all user activities.

For Tips & Tricks see page 20. For a Glossary of Terms see page 15.
**eSlate Data Flowchart**

**BOSS**

Creates the ballot database & saves it to a Mobile Ballot Box (MBB).

**Ballot Now**

Uses a BOSS ballot on an MBB, prints, scans, and saves Cast Vote Records for absentee/by-mail voting.

**eSlate PVS**

Uses a BOSS ballot on an MBB, presents ballots and saves Cast Vote Records for Early Voting & Election Day in-person voting. Includes: JBCs, eStates & Disabled Access Units.

**Tally**

Reads Cast Vote Records from MBBs voted on Ballot Now & eStates. Counts the votes and produces official results reports.
The Tally Window

Notice: No Taskbar Available. Tally will not allow the user to access another program while running Tally.
# TALLY MENUS

## File Menu
- File
  - Open Database
  - Save
  - Save As
  - Print
  - Exit

## Administration Menu
- Administration
  - User Tasks
  - Change Password
  - User Maintenance
  - Logs/Reports
  - Audit Database
  - Maintenance

## Reports Menu
- Reports
  - Combined Official Details
  - Total Vote Count
  - Election Status
  - Precinct Vote By Status
  - Previous Results
  - Combined Vote By Candidates
  - Printed Summary
  - Unassigned Polling Places
  - Written Candidates

- Reports
  - Combine Official Details
  - Total Vote Count
  - Election Status
  - Precinct Vote By Status
  - Previous Results
  - Combined Vote By Candidates
  - Printed Summary
  - Unassigned Polling Places
  - Written Candidates
Tally User Privileges

Administrators and Operators log in to the Tally application by typing a User ID (username) and password after opening Tally.

It is recommended that the user currently logged in:
> Stay at the computer while running the application,
> Exit the application if s/he steps away from the system.

An administrator sets user privileges. See the Tally Operations Manual for directions on setting user privileges. The following charts show user privileges for Tally functions and Admin menu commands:

<table>
<thead>
<tr>
<th>Tally Function</th>
<th>Update</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Databases</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Modify Databases</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Perform Manual Votes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Print Reports</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Change Current User</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Password</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create New Users</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
When you are ready for Tally, you have:

1. Created the ballot in BOSS.
2. Written all MBB and DAU cards.
3. Locked the BOSS database for Tally.
4. With MBBs created in BOSS you have;
   a. Conducted a Test or Election mode election with eSlates,
   b. Scanned and saved cast vote records for voted Ballot Now paper ballots, if applicable.

Creating a Tally Database

The definitions of the three types of status for a Tally Election database are:

- **NEW** – When the database currently being used has no votes recorded yet (no MBBs from Test or Election have been read).
- **OPENED** – When the database currently being used has votes recorded in it.
- **CLOSED** – When the database has been closed because all MBBs for the election have been read and all manual votes have been processed.

Pre-Election Activities

Before Election Day, you can perform the following tasks with the election’s Tally Election database that has the NEW or OPENED status:

- Define eligible write-in candidate names,
- Define Tally options for counting provisional ballots and consolidating split precincts,
- Read Test MBBs to perform a tabulation test, and
- View and print Test Tally reports.

Election Day Activities

On Election Day you can perform the following tasks with the election’s Tally Election database that has the OPENED status:

- Manage provisional ballots (this can also be done after the election is closed in Tally),
- Assign write-in votes,
- Read election MBBs from:
  - Absentee ballots recorded with the Ballot Now application
  - Early Voting ballots
  - Election Day ballots,
- View and print Unofficial Tally reports,
- Add or subtract votes manually,
- Reject or Accept Provisional Ballots.

Post-Election Day Activities

After all MBBs for the election have been read and the manual votes task is complete you can perform the following tasks with the election’s Tally Election database that has the CLOSED status:

- Close the Election,
- View and print Official Tally reports,
- Reject or Accept Provisional Ballots,
- Backup to CD and archive the election.
## Sequential Steps for Using Tally to Count Voted MBBs

<table>
<thead>
<tr>
<th>Steps:</th>
<th>More Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In the BOSS program, lock the BOSS database for Tally.</td>
<td>Make certain all MBBs and DAU cards have been written before locking.</td>
</tr>
<tr>
<td>2. Copy the BOSS database to Tally.</td>
<td>Test mode and Election mode databases are copied into Tally separately.</td>
</tr>
<tr>
<td></td>
<td>- Each Tally database must have a unique name.</td>
</tr>
<tr>
<td></td>
<td>- Only one Tally Election mode database for a specific BOSS database may exist at a time.</td>
</tr>
<tr>
<td>3. Edit Write-Ins and Aliases, if applicable.</td>
<td>Write-ins may be edited before and/or after MBBs have been read.</td>
</tr>
<tr>
<td></td>
<td>- An election cannot be closed until all write-ins have been edited and resolved.</td>
</tr>
<tr>
<td>4. Define Tally Options.</td>
<td>Tally Options include:</td>
</tr>
<tr>
<td></td>
<td>- Choosing to include provisional ballots in the totals, or not to, and</td>
</tr>
<tr>
<td></td>
<td>- Choosing to consolidate split precincts, or not to.</td>
</tr>
<tr>
<td>6. Repeat steps 2, 3, and 4 for the Election mode database.</td>
<td>Election mode MBBs can only be read into Tally on the date of the election or later, based on the election date defined in BOSS.</td>
</tr>
<tr>
<td>7. Read the Election mode MBBs.</td>
<td></td>
</tr>
<tr>
<td>8. Assign Unassigned Write-Ins, if applicable.</td>
<td></td>
</tr>
<tr>
<td>9. Process provisional ballots now or after the election has been closed in Tally.</td>
<td></td>
</tr>
<tr>
<td>10. Calculate any necessary manual vote tabulations.</td>
<td></td>
</tr>
<tr>
<td>11. Import votes from other systems, if applicable.</td>
<td></td>
</tr>
<tr>
<td>12. After all MBBs have been read, close the election in Tally.</td>
<td>You can read unvoted MBBs that were created as backups for the election in order to account for all MBBs written.</td>
</tr>
<tr>
<td>13. Print official reports.</td>
<td>Reports are unofficial until the election is closed in Tally.</td>
</tr>
</tbody>
</table>

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Tally Software Training Manual

Tally Operator Training Course Outline

TALLY OPERATOR TRAINING COURSE OUTLINE

Estimated Time: 1 day

Audience: Tabulation specialists, Elections Officials

Objectives: Trainees will open Tally and copy a BOSS database, set up Tally before the election starts, read MBBs, look at challenged ballots, assign write-ins, enter absentee and manual votes, view and print Tally reports, close an election and archivethe Tally database.

Benefits of Tally: Tally tabulates the cast votes with "one click" simplicity. Certified write-ins can be identified before tabulation takes place, making counting votes for those positions automatic. Provisional ballots can be automatically included in the count, or not, and can be backed out or added if challenged. Test mode tabulations are kept in separate databases from election mode databases.


Modules: 1-6

Prerequisite: Hands-on demonstration with the eSlate. Trainees will use the system as if they are "voters", if time and equipment availability allow.

Teaching Points:

▶ Module 1: Tally, Getting Started
  ▶ System Overview and Benefits to Trainees, and Course Objectives
  ▶ eSlate EVS data flowchart, Tally Window, Tally menus
  ▶ Review Locking the BOSS database for Tally
  ▶ Opening Tally
  ▶ Checking disk space
  ▶ Copying a BOSS database to Tally
  ▶ Opening a Tally database

  □ Exercise 1.1: Copy a BOSS database that you have locked for Tally and voted on an eSlate (or scanned with voted paper ballots from Ballot Now). Create a Tally database from this BOSS database, and open it.
Module 2: Pre-Election Activities
- Editing Write-In Candidates
- Adding aliases
- Defining Tally Options
  - Options for Consolidating Split Precincts
  - Options for Rejecting Provisional Ballots
- Mobile Ballot Box Types
- Test Mode Tabulation (Pre-Election Logic & Accuracy Test)
- Possible MBB Error Messages
  - Exercise 2.1: Edit write-ins and assign aliases. Define the Tally Options to reflect the election you have an MBB for and state and local regulations. Read an MBB written in Test Mode and voted on an eSlate (and/or a test MBB from scanned Ballot Now paper ballots).

Module 3: Election Day Activities
- Opening an Election (with a new Tally database, Pre-Election Activities completed sans Test Tabulation) & reading Election MBBs.
- Assigning unassigned write-ins
  - Exercise 3.1: Copy the BOSS database into Tally, complete Pre-Election Activities for the new Tally database, and read an MBB written in Election Mode and voted on an eSlate (and/or an MBB from scanned ELECTION Ballot Now paper ballots), if available.
  - Exercise 3.2: Assign at least one unassigned Write-in to a contest. If you have more than one unassigned Write-in, remove at least one. Resolve all write-ins.

Module 4: Manual Votes, Importing Votes from Other Systems & Closing the Election
- Manual Votes
- Importing Votes from Other Systems
- Closing the Election
- Rejecting or Accepting Challenged Provisional Ballots
- Backing Up the Tally Database to a CD-R.
  - Exercise 4.1: Adjust the tabulation for your election. Add 5 votes to one candidate. Subtract 2 votes from another candidate.
  - Exercise 4.2: Close the election you have been working with. Process Provisional Ballots. Accept (leave) at least one. Reject at least one. Print a "Provisional Ballots" Report. Back up the Tally database to CD-R.

Module 5: Reports
- Reports
  - Exercise 5.1: View reports. If you are connected to a printer, print a report of your choice.
Module 6: Tally Administration Tasks

- Viewing Audit Log (print out)
- Copying a BOSS database (covered in Tally Course, Module 1)
- User Privileges
- Password Security
- Changing User Password
- Creating New User
- Procedures for a recount or contested election
- Archiving the Election

Appendices

Exercise 6.1: View the options in the Administration menu. Administrative users, add yourself as a new user. Delete the original user. Add other operators as users, giving them appropriate privileges.

Review Appendices and Day's lessons

Appendices

- Glossary of Terms
- Information, Confirmation, Error & Warning Messages
- Tips & Tricks
- Backing Up Election Databases to a CD
- Course Self-Check List
## Appendix A: Glossary of Terms

### Term | Definition
--- | ---
ACCESS CODE | A four-digit number given to each voter from the JBC. The ACCESS CODE tells the eSlate system which ballot style (precinct) to display to the voter.
ACCESS CODE Summary | A JBC report that is printed when polls are closed on Election Day. It lists the number of ACCESS CODES issued, voted, expired, and canceled.
Alphanumeric | A field type. Means that the field can contain both letters (alpha) and numbers (numeric).
Americans with Disabilities Act (ADA) | A 1990 federal act, Public Law 101-336, that established comprehensive standards for the treatment of persons with disabilities in employment, public accommodations, and other programs, including those operated by state and local governments.
ASCII file | American Standard Code for Information Interchange. Files that, by their formatting, are easier to transfer between different types and versions of computers. Also called "text files".
Audit Trail | Information that allows the elections office to view the steps that occurred on the equipment included in an election to verify the steps and procedures followed without compromising voter privacy.
Ballot Format | The arrangement of the ballot created in BOSS. Ballots may be formatted for the eSlate PVS or for Ballot Now.
Ballot Instructions | Instructional text that appears at the top of the ballot. There are two separate types of Ballot Instructions: (1) PVS (for the eSlate PVS system) and (2) Ballot Now™.
Ballot Now™ | The eSlate EVS software application that prints paper ballots on demand and then digitally images the voted ballots to save for delivery to Tally.
Ballot Style | The specific ballot created by precinct assignments to contests in BOSS.
Ballot Text | Instructional text embedded in the ballot. Ballot Text is usually used to identify a section of the ballot.
BOSS™ | Ballot Origination Software System. This is the software that builds an election database and writes multiple ballot styles. BOSS is used to create the MBB and DAU cards that drive PVS and Ballot Now™.
Contest | A choice to be made on the ballot. Also known as races, offices, issues, referendums, and questions.
Cast Vote Record (CVR) | Electronic version of each vote cast, reflecting a ballot from each voter.
Crystal Reports | An off-the-shelf report formatting software application for database-centered products.
Cumulative (ACCESS CODE) Summary | A summary on the JBC Suspend Report or Daily Detail report that lists the ACCESS CODES issued, voted, expired, and canceled for the entire session of Early Voting.
Database | A storage point for information (data).
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyclic Redundancy Check</td>
<td>A continuous test of each transfer of data within a system to ensure that the data received at the end of the transfer is the same as the data originated by the source.</td>
</tr>
<tr>
<td>Daily Detail Report</td>
<td>A JBC report that can be printed out when polls are suspended in Early Voting. This report lists the number of ACCESS CODES issued and voted by precinct, as well as Daily (ACCESS CODE) Summary and Cumulative (ACCESS CODE) Summary Reports.</td>
</tr>
<tr>
<td>Daily (ACCESS CODE) Summary</td>
<td>A summary on the JBC Suspend Report and Daily Detail report that lists the ACCESS CODES issued, voted, expired, and canceled for only the current day of Early Voting.</td>
</tr>
<tr>
<td>Daisy Chain</td>
<td>Items connected in a series. The eSlates are daisy chained, one to another, with one plugging into the JBC.</td>
</tr>
<tr>
<td>DAU card</td>
<td>The PC card that enables the DAU eSlate to carry audio and respond to the specialty input devices. Also called an &quot;Audio Card&quot;.</td>
</tr>
<tr>
<td>Disabled Access Unit™ (DAU)</td>
<td>An eSlate that includes a PC card module. A PC card is inserted into this module so that voters with disabilities can vote independently and privately, listening to the ballot with headphones and/or interacting with the ballot using tactile input switches or a sip and puff device. Also called the &quot;DAU eSlate&quot;.</td>
</tr>
<tr>
<td>Direct Record Electronic (DRE)</td>
<td>The election industry term for an electronic machine at which a voter can view and vote a ballot.</td>
</tr>
<tr>
<td>Election Identification Report</td>
<td>A report that the JBC prints when the polling place ID is selected. The report contains the current date and time, jurisdiction name, election name, election date, polling place, and number of precincts enabled.</td>
</tr>
<tr>
<td>eSlate Unit</td>
<td>A Hart InterCivic electronic voting input device without audio capability. An electronic ballot is presented on this unit.</td>
</tr>
<tr>
<td>eSlate Electronic Voting System (EVS)</td>
<td>The entire system from BOSS to Tally. Includes: BOSS, the Precinct Voting System (see eSlate Precinct Voting System), Ballot Now, and Tally. Also called EVS or eSlate EVS.</td>
</tr>
<tr>
<td>eSlate Precinct Voting System (PVS)</td>
<td>Those components of the eSlate EVS that are required for election activities at individual polling places. The PVS includes: JBCs, eSlates, DAU eSlates, MBBs, and all accessories for polling place voting.</td>
</tr>
<tr>
<td>Fast Trak Tally</td>
<td>A software utility that allows a summary of results to be sent to a central location from the Judge's Booth Controller, via modem, to provide advanced unofficial results.</td>
</tr>
<tr>
<td>Field</td>
<td>An area available for data entry in a software application, like BOSS or Tally.</td>
</tr>
<tr>
<td>Firmware</td>
<td>Computer programs installed permanently in a hardware device that allow data to be read and a program to be executed, but for which alterations of the data or the program are not permitted.</td>
</tr>
<tr>
<td>Flash Memory</td>
<td>Flash memory is reprogrammable, read-only memory and is used in PC cards or MBBs. Flash Memory does not require continuous electric power to operate. It is a system that can store more data and work faster than a traditional floppy disk.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Judge's Booth Controller (JBC)</td>
<td>The control unit of the eSlate PVS, through which a poll worker distributes electronic ballots to the eSlate and DAU eSlate.</td>
</tr>
<tr>
<td>JBC Initialized Report</td>
<td>A report printed from the JBC any time the system is powered on. A self-diagnostic test is run on the system, and the result is indicated as &quot;PASS&quot; on the report.</td>
</tr>
<tr>
<td>Jurisdiction</td>
<td>A precinct or group of precincts managed by a single organization.</td>
</tr>
<tr>
<td>Logic and Accuracy Test (L &amp; A)</td>
<td>In the context of an election, a test to check the accuracy of a piece of voting equipment. It is accomplished by feeding test ballots for which the results are already known (i.e., a &quot;test deck&quot;) through the ballot counting system and comparing the results with the expected results.</td>
</tr>
<tr>
<td>Mobile Ballot Box (MBB)</td>
<td>A PC card that holds all of the ballot information for the eSlate EVS. An MBB is placed in the JBC unit, and an MBB is used in the Ballot Now computer. Cast Vote Records are stored on MBBS.</td>
</tr>
<tr>
<td>Network Configuration Report</td>
<td>A report printed on the JBC after booths are assigned. The report contains the serial number, software version, PUB count, and PVT count for the JBC and each eSlate unit.</td>
</tr>
<tr>
<td>PC Card</td>
<td>A piece of hardware about the size of an ATM card. It is an information storage device, similar in function to a floppy disk. It is also called a &quot;PCMCIA&quot; card. In the eSlate Electronic Voting System it is called a Mobile Ballot Box (MBB)</td>
</tr>
<tr>
<td>Party</td>
<td>A political party. For example, Democrat or Republican.</td>
</tr>
<tr>
<td>Polling Place</td>
<td>Where voters physically go to vote. A single polling place, during early voting, can support multiple precincts.</td>
</tr>
<tr>
<td>PUB Count</td>
<td>A six-digit number, shown on the Network Configuration Report from the JBC that indicates how many votes have been counted on that machine for the current election.</td>
</tr>
<tr>
<td>Precinct</td>
<td>A jurisdiction subdivision for election purposes.</td>
</tr>
<tr>
<td>Provisional Voter</td>
<td>A voter who may not meet the qualifications for voting at that polling place, but is allowed to vote on a &quot;provisional ballot&quot; under conditions by state election law. Because the voter is &quot;provisional&quot;, his/her ballot must be retrievable by election officials under certain conditions that vary from state to state. Also called a voter with a &quot;challenged ballot&quot;.</td>
</tr>
<tr>
<td>PVT Count</td>
<td>A six-digit number, shown on the Network Configuration Report from the JBC that indicates how many votes have been counted on that machine in its lifetime.</td>
</tr>
<tr>
<td>Retrieval Code</td>
<td>A unique number assigned to a provisional ballot to enable swift retrieval of that ballot from the eSlate system by election officials.</td>
</tr>
<tr>
<td>Select Wheel</td>
<td>The rotary wheel on the eSlate and DAU eSlate that allows a voter to navigate the ballot and highlight choices by turning the wheel. It is also called Rotary Select Navigation System.</td>
</tr>
<tr>
<td>Slip &amp; Puff</td>
<td>An input device that connects to the DAU eSlate in the handicap access jack. This enables voters with disabilities with extremely limited mobility to vote with a mouth-controlled device.</td>
</tr>
<tr>
<td>Split Precinct</td>
<td>The smallest division of a precinct for election purposes.</td>
</tr>
<tr>
<td>Spoiled Ballot</td>
<td>A ballot that has been ruined somehow. The voter is still present, and the voter needs a new ballot. With the eSlate system, a ballot is spoiled if the voter gets the wrong ballot style (precinct), the wrong language, or is not on the DAU eSlate but needs to be.</td>
</tr>
</tbody>
</table>
### Appendix A: Glossary of Terms (cont.)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspend Report</td>
<td>A JBC report that automatically prints when polls are suspended in Early Voting. The report lists the PUB count and PVT count of the JBC and eSlate units, a Daily (ACCESS CODE) Summary, and a Cumulative (ACCESS CODE) Summary.</td>
</tr>
<tr>
<td>Tactile Input Switches</td>
<td>Also called &quot;jelly switches&quot; or &quot;jelly buttons&quot;. Red and green &quot;paddles&quot; that enable voters with disabilities to vote without using the SELECT wheel and ENTER button on the eSlate. Voters without fine motor control use these. The RED tactile input switch is similar to the eSlate's SELECT wheel. The GREEN tactile input switch is similar to the eSlate's ENTER button.</td>
</tr>
<tr>
<td>Tally™</td>
<td>The eSlate EVS tabulation software. After an election, the Tally software counts the votes on the MBB(s) and produces reports on those cast votes.</td>
</tr>
<tr>
<td>Tally Report</td>
<td>A JBC report that is printed when polls are closed on election day. It includes the date, time, precinct, a tally of votes for each contest, and an ACCESS CODE Summary.</td>
</tr>
<tr>
<td>Thrown-out Ballot</td>
<td>A voted ballot that the voter did not place into the ballot box before leaving the polling place. With the eSlate system, this is a ballot that the voter did not cast by pressing CAST BALLOT, and the voter is not present.</td>
</tr>
<tr>
<td>UPS</td>
<td>Uninterruptible Power Supply.</td>
</tr>
<tr>
<td>Voter Registration Computer</td>
<td>An electronic poll book. Sometimes known as a &quot;thin client&quot;.</td>
</tr>
<tr>
<td>Zero Tape Report</td>
<td>A JBC report that prints out when polls are opened on the first day of Early Voting and on Election Day. This report lists the contests and candidates on the ballot, and verifies that the number of votes for each candidate is zero.</td>
</tr>
</tbody>
</table>
## Appendix B: Information, Confirmation, Error, and Warning Messages

<table>
<thead>
<tr>
<th>Type of Message</th>
<th>Explanation</th>
<th>Example</th>
</tr>
</thead>
</table>
| **Information** | • Informs about a successful operation.  
• Has an information icon (an I in a bubble).  
• Has only an OK button. | ![Information Example](image) |
| **Confirmation** | • Used when modifications made are lost when Close is clicked instead of Save.  
• Answered by Yes or No.  
• Has a question mark icon (a ? in a bubble).  
• Can include text from the command performed. | ![Confirmation Example](image) |
| **Error** | • First statement in error gives the problem.  
• Second statement tells you what to do.  
• The error icon (an X inside a red circle) is present.  
• Has only an OK button. | ![Error Example](image) |
| **Warning** | • Appears when the program wants you to double-check a command.  
• Can include text from the command performed.  
• Has an exclamation icon (a ! inside a yellow triangle). | ![Warning Example](image) |
Appendix C: Tips and Tricks

The following apply to ALL eSlate Electronic Voting System programs.

Password tips:

Do not give out the administrator password, either to the computer where the eSlate Electronic Voting System software is kept, or to your administrator login for BOSS, Tally, and/or Ballot Now.

Once you are assigned your password, immediately log in to BOSS, Ballot Now, and Tally and change your password. Have operators with “User” level privileges do the same.

Do not use:

- Any password you have used before.
- Any string of 3 characters repeated or reversed.
- Any character repeated more than twice.
- Your name or your initials.
- Your computer user ID in any form.
- The names of relatives, birthdays, phone numbers or the company name.
- The number for this year, last year or next year, or the three-character abbreviations for the months.
- Telephone number or car license plate numbers.
- Common mathematical values (like pi, sigma and natural log).

Do use:

- A combination of upper and lowercase letters.
- A password that is at least 8 characters long.
- A new password every 6 months.
- Random characters you will remember.

Tips for a secure password:

- Use the first letters of the words in a memorable phrase.
- Use a meaningless but easy-to-remember phrase.
- Combine numbers and letters.
- Note the password in a private and secure location.
Software Features:

- Whichever button is shadowed/dotted inside a window is what the computer is going to assume you mean to do when you press Enter. For example:

- In a menu, an arrow facing to the right ▶ opens up an item called a "pop-up menu," offering more choices.
- In a dialogue box, the arrow facing down ▼ opens a "list box," offering more choices.
- On the menu bar and on buttons inside a window, there is one letter underlined. For example, File or Add. These are called hot keys and can be used to access menus, menu options and buttons instead of using the mouse. To access hot keys:
  1. Press Alt on the keyboard (to either side of the space bar).
  2. Press the underlined letter in the word (for example: F in File or A in Add).
    - The menu drops down or the button performs its action.
    - Once inside a menu, you simply press the underlined letter in the menu option you are looking for (for example: press O in Open). You do not need to press Alt again.
    - You can also use the arrow keys on your keyboard (↑↓→←) to move around inside a menu. Once you have highlighted the menu option you wish to use, press Enter and the option launches.
    - To exit a menu, press Esc until the menu disappears (usually once time for each menu/submenu open).

The following tips apply to a specific software program listed to the left.

- **BOSS & Ballot Now**: To highlight/select a list of precincts that are all together in the list, use **SHIFT + CLICK**.
  1. Click the first one once.
  2. Hold down on shift.
  3. Click the last one once.

- **BOSS & Ballot Now**: To highlight/select a list of precincts that are NOT all together, use **Ctrl + CLICK**.
  1. Click the first one.
  2. Hold Ctrl.
  3. Continue to click holding Ctrl until you have selected all those you wish.
  4. Release Ctrl.
Tally Software Training Manual

Appendix C: Tips and Tricks (cont.)

- **BOSS** Copy and Paste:
  1. Select the item(s) you wish to copy from the source document. (To select, click and drag over the item to highlight it.)
  2. Press Ctrl and then C (the shortcut key for copy).
  3. Return to BOSS (by clicking on its program button on the taskbar. It says Ballot Origination... or as much of the title as it can fit onto the button).
  4. Make certain the cursor is blinking in the field you wish to paste into and press Ctrl and then V or Shift + Ctrl + V to paste.
  5. You can paste English and Spanish proposition or instruction text into the “English” panel, then cut and paste the Spanish from that panel to the “Spanish” panel.
  6. You can copy and paste from one BOSS field to another, in most windows, by using Shift + Ctrl + a shortcut key (C,X,V).

- **BOSS** To force a line within text use the | (pipe character). This character can be inserted using Shift and the ! key on your keyboard. The | is just above the enter button and looks like:

```
| |
```

- **BOSS:**

```
[   ]   Adds selected

[   ]   Adds all

[   ]   Removes selected

[   ]   Removes all
```

- **BOSS:** Once the ballot is generated the current database is, for all practical purposes, locked for editing or changing. Audio is still available after generating a ballot and before writing MBBs. Once the MBBs are written, audio is no longer available and the only action available is writing MBBs. Once the BOSS database is locked for Tally no actions are available in that database.

- **Tally:** Test and Election mode MBBs are read into separate databases. This is in order to protect the database integrity. Only one election database may exist for a unique BOSS database.

- **Tally:** You can read unvoted MBBs that were written as spares into Tally. This allows you to account for all MBBs written for the election. Reports and the audit trail will reflect that all MBBs are accounted for.
Appendix D: Backing Up Election Databases to a CD

These steps assume that you are using the Adaptec Easy CD Creator program, though your version may have slightly different screens, the steps will be similar. These steps show one way to backup files using the Adaptec program.

We also suggest using a CD-R instead of a CD-RW. A CD-R is a one-time use—you can only write to it once, and then you can only Read off of it. A CD-RW is readable/writeable, and can be used multiple times like a floppy disk—you can Read and Write to it as often as you want. CD-R's are fairly inexpensive, and the data on the CD itself cannot be changed. This makes the CD-R option a good media for backing up data.

<table>
<thead>
<tr>
<th>Steps</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Close BOSS &amp; Tally (and Ballot Now, if applicable).</td>
<td></td>
</tr>
<tr>
<td>2. Click the Easy CD Creator shortcut on the desktop.</td>
<td>The Adaptec CD Creator Select a Project menu appears.</td>
</tr>
<tr>
<td>3. Rollover (mouse over) the make a data CD button.</td>
<td></td>
</tr>
<tr>
<td>4. Click on dataCD.</td>
<td></td>
</tr>
</tbody>
</table>

Select a Project
Appendix D: Backing Up Election Databases to a CD

The Data CD Project window appears:

5. Rename the CD to reflect the Election Title.

6. Navigate to C:\bossDatabase

7. Drag and Drop the BOSS election database folder (named by timestamp) from the upper panel to the CD in the lower panel.
Appendix D: Backing Up Election Databases to a CD

8. Rename the backup BOSS database on CD to reflect the title of the election.

9. Repeat the drag, drop, and rename steps for the Tally and Ballot Now databases.
   - The Tally database is in a timestamped folder, like the BOSS database, located at C:\tallyDatabase.
   - The Ballot Now database (and image files) folder is named with the Ballot Now election I.D. It is located at D:\Program Files\Hart InterCivic\Ballot Now.
Appendix D: Backing Up Election Databases to a CD

Before you record to the CD, the CD Project window should look something like this:

![CD Project Window](image)

10. Click record.

The Record CD Setup window appears:

![Record CD Setup Window](image)

11. Click Options (if not already selected).
Appendix D: Backing Up Election Databases to a CD

The Data CD Project window options appear:

12. Select Record CD.

13. Select Track-At-Once and Finalize CD.

14. Click Start Recording.
The Data Record CD Progress window appears:

15. When the Disk Progress bar indicates the CD is 100% written, click Details.

16. Verify that all tracks and files were recorded and click OK.
Appendix D: Backing Up Election Databases to a CD

The following information box appears:

17. Click NO.

<table>
<thead>
<tr>
<th>Steps</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>18. Close the Easy CD Creator windows.</td>
<td></td>
</tr>
<tr>
<td>19. Label the CD.</td>
<td></td>
</tr>
<tr>
<td>20. Load the CD, navigate to the CD drive and verify that the CD contains all of the databases you intended to back up.</td>
<td></td>
</tr>
</tbody>
</table>

21. File the CD in a secure location.
Appendix E: Course Self-Checklist

Respond YES or NO to the following items regarding the Tally Software Training.

<table>
<thead>
<tr>
<th>Learning Point</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I can log into Tally.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I am able to check disk space.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I can copy a database into Tally.</td>
<td></td>
<td></td>
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<tr>
<td>4. I am able to edit write-ins &amp; aliases.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I am able to define Tally options for provisional ballots and consolidation of split precincts.</td>
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<td></td>
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<tr>
<td>6. I can test an election.</td>
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<tr>
<td>7. I am able to open an election (in election mode).</td>
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<tr>
<td>8. I can add manual &amp; absentee votes.</td>
<td></td>
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<tr>
<td>9. I am able to process provisional ballots.</td>
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<tr>
<td>10. I can assign unassigned write-ins.</td>
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<tr>
<td>11. I am able to view &amp; print reports.</td>
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<td></td>
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<tr>
<td>12. I can close an election.</td>
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<td></td>
</tr>
<tr>
<td>13. I am able to change my password.</td>
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<td></td>
</tr>
<tr>
<td>14. I can back up a Tally database to CD.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>