

TALLY

eSlate™ Electronic Voting System
Tally System
Operations Manual

Software V. 2.8

Hart InterCivic
Election Solutions Group

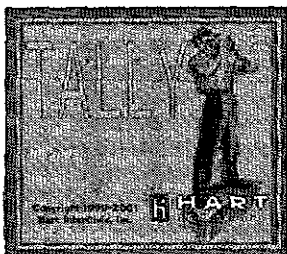
1650 Coal Creek Drive, Suite E
Lafayette, Colorado 80026

Phone: 303.385.6440 Fax: 303.385.6477

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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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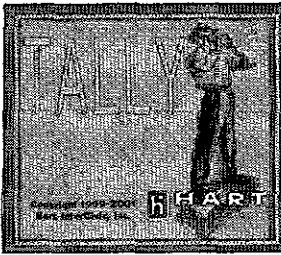
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About This Book

Main Topics

Overview, this page.

- ◆ **The Tally Election database** on page 10.
- ◆ **Pre-Election Activities** on page 10.
- ◆ **Election Day Activities** on page 10.
- ◆ **Post-Election Day Activities** on page 10.

System Architecture on page 11.

Audit Log on page 12.

Making Selections on page 13.

Sequential Steps for Using Tally to Count Voted MBBs on page 15.

Documentation Roadmap on page 16.

Overview

This manual describes how to use the Tally application software to tally (count) the votes recorded on MBBs (Mobile Ballot Boxes) used with the Hart InterCivic, Election Solutions Group's eSlate™ Electronic Voting System equipment and software applications during:

- ◆ Test voting,
- ◆ Absentee Voting,
- ◆ Early Voting, and on
- ◆ Election Day.

The Tally application is password protected, which means a User ID and password are required to open Tally.

Real-time audit messages describing all operator input to the Tally application are printed at the system line printer (see **Audit Log** on page 12).

The Tally Election database

To use the Tally application for counting the votes in an election, the Administrator must copy the BOSS Election database used for the election into the Tally application (see **Copying the BOSS Database** on page 21). This database then becomes available in the **Open Database** window (see **Opening the Tally Election Database** on page 24).

Status of the Tally Election database

The status of the Tally Election database determines how you can write to and read from the database during:

- ◆ Pre-Election Activities (see page 10)
- ◆ Election Day Activities (see page 10)
- ◆ Post-Election Activities (see page 10)

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 (see **Chapter 4 Manual Votes**, page 61).

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 and
- ◆ 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 challenged ballots,
- ◆ 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 Tally Unofficial Tally reports,
- ◆ Add or subtract votes manually.

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:

- ◆ Process provisional ballots
- ◆ Import votes from other systems
- ◆ Close the Election
- ◆ View and print Official Tally reports
- ◆ Archive the election

System Architecture

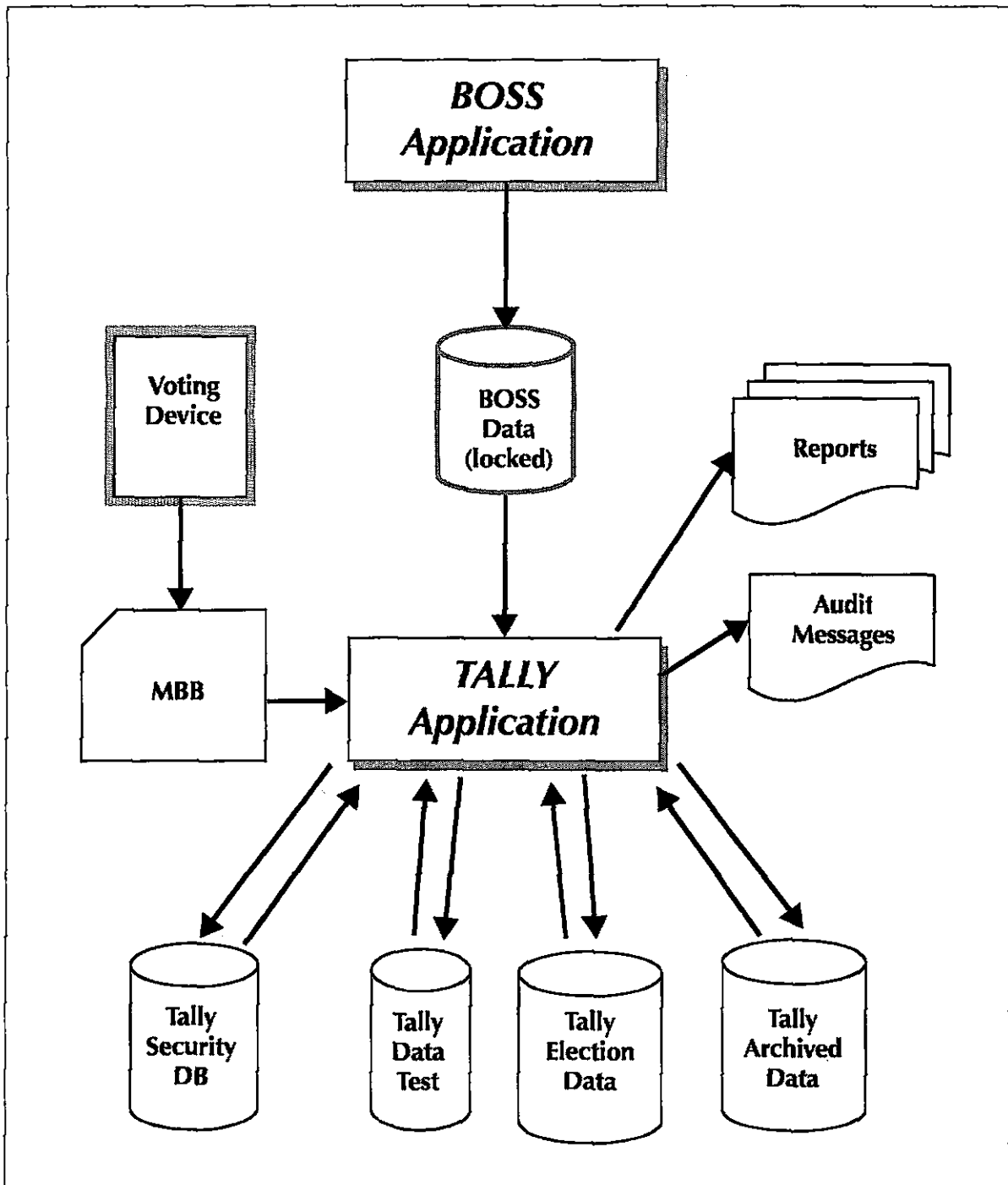


Figure 1 System architecture for the Tally System.

Audit Log

The Tally System application prints a real-time audit log to the system line printer. You can also view the audit log in WordPad (see **Viewing the Audit Log in WordPad** on page 125).

Real-time audit messages are sent to the system line printer when one of the following activities occurs while you are working in the Tally System application:

- ◆ Open Database
- ◆ Open Election mode
- ◆ Read MBBs
- ◆ MBB read errors
- ◆ Challenged ballots tallied
- ◆ Challenged ballots rejected
- ◆ Report printed
- ◆ Assign write-ins rejected
- ◆ Close Election
- ◆ Update manual votes
- ◆ Add absentee votes
- ◆ Archive database
- ◆ Write-ins edited
- ◆ Copy BOSS database
- ◆ Test mode tabulation
- ◆ Manual votes modified
- ◆ Check disk space
- ◆ Log on
- ◆ Log off
- ◆ Printer error

In addition, any error messages presented during any of the above activities are also sent to the system line printer as they occur.


NOTE: It is recommended that you wait for the line printer to finish printing the current audit message before you perform the next activity in the Tally System application.

Information printed in the audit log

The date, time, event name, and user ID is included for each event printed in the audit log. Audit log messages are provided in **Appendix A**, beginning on page 159.

Printer error

If the line printer fails for some reason while you are using the Tally System application (i.e., powered off, paper out, loose cable, ribbon needs changing), a printer error message will appear (see **Figure 2**).

- 1 Click .
Tally will close.
- 2 Fix the printer.
- 3 Start the Tally System application.
The audit log will include the printer error.

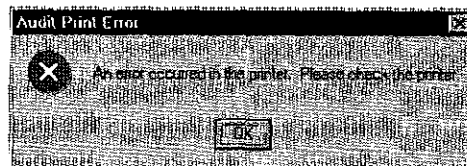



Figure 2 Audit Print Error message.

Making Selections

Some suggestions for how to navigate in the Tally System application are provided in this section. You will often need to use the mouse to move to an item in a Tally System 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 , 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 3**), move the mouse pointer over the field, then press the left mouse button once.

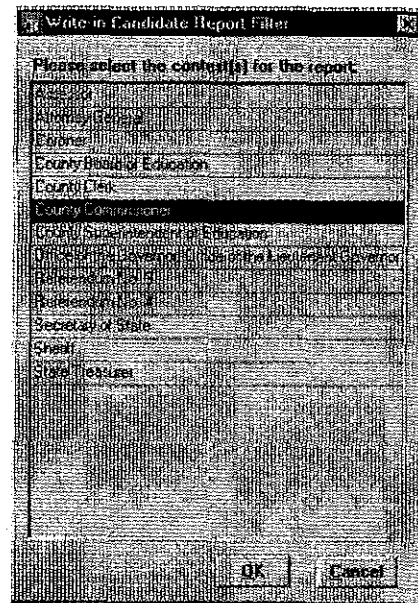


Figure 3 A selected (highlighted) field in a window.

Steps for: Making multiple selections at once

- ✓ To select a multiple items, as from a list in a window (see **Figure 4** on page 14):
 - Move the mouse pointer over the first item, then
 - press the left mouse button once, then
 - press and hold down the **Ctrl** key on the keyboard, then
 - move the mouse pointer over the next item, then
 - press the left mouse button again, then
 - when you are finished highlighting items,
 - release the Ctrl key.

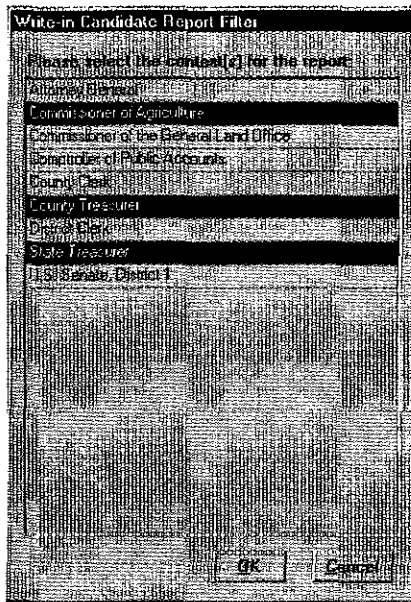


Figure 4 Multiple items selected in the Available Precincts list.

Steps for: Double-clicking

- ✓ When the instructions tell you to “double-click,” press the left mouse button rapidly twice.

Sequential Steps for Using Tally to Count Voted MBBs

An overview of the recommended order for performing the procedures to count voted MBBs using the Tally application and relevant cross-references to the instructions in this manual is given below.

Procedure	Cross-Reference
1. The BOSS election database should have been locked in the BOSS application.	See Lock the Election Database for Tally in the eSlate™ Ballot Origination Software System Operations Manual
2. Copy the BOSS database to Tally.	Copying the BOSS Database on page 21
3. Open the Tally election database.	Opening the Tally Election Database on page 24
4. If write-ins are allowed in the election, edit Write-in Names. You can do this now, or after MBBs have been read (in 7. below), but before the Election has been closed (in 11. below).	Opening the Pre-Election Activities Window on page 28 and Defining Valid Write-In Candidate Names for a Contest on page 30
5. Define the options you want to apply to the tally.	Defining Tally Options on page 40
6. Set Tally to TEST or ELECTION.	
a. If you are tallying voted TEST MBBs, put Tally into test mode.	Tabulation Tests with Test Mode MBBs on page 44
b. If you are tallying voted ELECTION MBBs, put Tally into Election mode. NOTE: The date of the Election as defined in BOSS must have occurred (the current date is equal-to or greater-than the date of the Election as defined in BOSS).	Opening the Election for Tabulation on page 46
7. Read the MBBs.	Opening the Election Day Activities Window on page 47
a. If you are in test mode, insert the voted TEST MBBs.	Reading MBBs on page 51
b. If you are in Election mode, insert voted ELECTION MBBs.	Reading MBBs on page 51
8. Assign unassigned write-ins.	Assigning Unassigned Write-In Votes on page 57
9. Process provisional ballots and import votes from other systems now or after the Election has been closed in Tally.	◆ Managing Provisional Ballots on page 53 ◆ Chapter 8 Including Votes from Other Systems
10. If you were in test mode with voted TEST MBBs, verify vote count accuracy.	Compare Tally reports with your test scripts. Summary of Tally Reports on page 71
11. After all MBBs have been read, close the Election in Tally.	Closing the Election on page 68
12. After the Election has been closed in Tally, back-up the tally database, then copy the file to a CD-R.	Archive Database Task on page 122

Documentation Roadmap

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

eSlate Tally System Operations Manual (this book)

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™ Ballot Origination Software System Operations Manual

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 (Mobile Ballot Box™) for use with the eSlate Electronic Voting System.

eSlate™ Precinct Voting System Election Day Manual

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

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

This manual describes how to set up and use the DAU 5000™ voting units.

Ballot Now Operations Manual

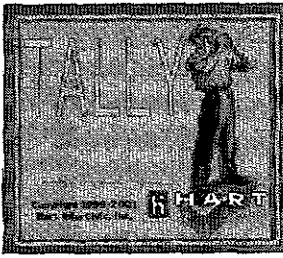
This manual describes how to manage paper ballots for an election created from the eSlate Electronic Voting System.

eSlate™ Electronic Voting System Product Description

This manual describes how the various software and equipment components of the eSlate Electronic Voting System are used to run an election.

eSlate™ BOSS Administrative Databases Operations Manual

This manual describes how to use BOSS to create administrative databases for general elections and for primary elections, which can then be copied and customized to create an election-specific database during preparation for an election.



Chapter 1

Getting Started

Main Topics

Starting the Tally System Application, this page.	Copying the BOSS Database on page 21.
User Privileges on page 18.	Opening the Tally Election Database on page 24.
Checking Disk Space on page 19.	

Starting the Tally System Application

The Tally System application may be installed for the first time or maintained by:

- ◆ Hart InterCivic, Election Solutions Group personnel, or
- ◆ an authorized customer System Administrator with a valid User ID and password.

Steps for: Opening the Tally System window

A User ID and password are required to start the Tally System application.

- ✓ To start the Tally System application:
 - 1 Click **START**, the Start button on the Windows task bar.
 - 2 From the **Start** menu, choose **Programs-->Tally**.
The splash screen for Tally System appears, followed by the Tally System Logon window (see **Figure 1-1**).

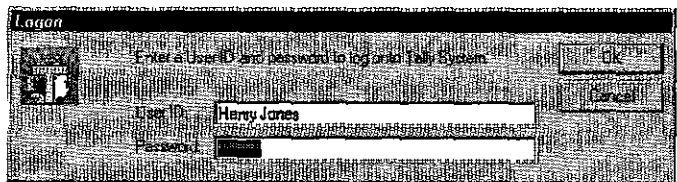


Figure 1-1 Tally System Logon window.

- 3 In the **User ID** field, type your user ID.
- 4 In the **Password** field, type your password.
- 5 Click . The **Check Disk Space** window appears (see **Check Disk Space window** on page 19).

User Privileges

Users are assigned either Administrator or Operator privileges for using the features and functions in the Tally application by an Administrator in the **Create New Users** window (see **Create New Users Task** on page 120).

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

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

Operation	Operator	Administrator
Change Password	Yes	Yes
Copy Database	Yes	Yes
Create New User	No	Yes
Archive Database	No	Yes
View Audit Log	No	Yes
Open the Tally database	Yes	Yes
Edit Write-In Names	Yes	Yes
Define Tally Options	Yes	Yes
Set Tally to TEST or ELECTION	Yes	Yes
Read MBBs	Yes	Yes
Assign Unassigned Write-Ins	Yes	Yes
Process Provisional Ballots	No	Yes
Process Manual Votes	No	Yes
Import Votes from Other Systems	No	Yes

Checking Disk Space

The **Check Disk Space** window gives you the opportunity to determine if there is enough free space on the computer's hard drive to complete a tally for an election. To check the disk space accurately you will need to enter the following information in the **Check Disk Space** window (see **Figure 1-2**) for the election you want to tally:

- ◆ The location on the computer's hard drive of the BOSSDATA.db file
- ◆ The number of MBBs that must be read by the Tally System

Check Disk Space window

The **Check Disk Space** window automatically appears at the following times:

- ◆ Right after you log into the Tally System application.
- ◆ Each time you select **Open Database** from the **File** menu.

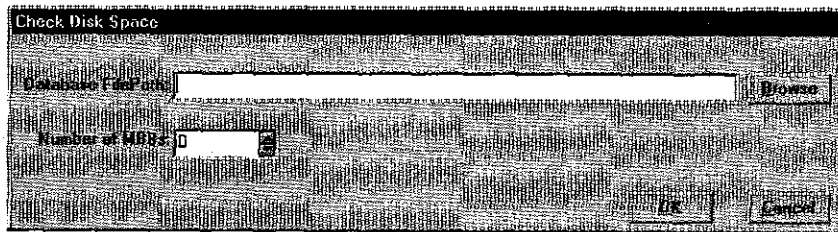


Figure 1-2 Check Disk Space window.

Steps for: Checking disk space

You can determine if there is enough free space on the computer's hard drive to complete a tally for an election using the **Check Disk Space** window.

NOTE: If you do not want to check disk space, click **Cancel** in the **Check Disk Space** window to close it.

- ✓ To check disk space in the **Check Disk Space** window:

- 1 Click **Browse**.

The **Select Database File** window appears (see **Figure 1-3**)

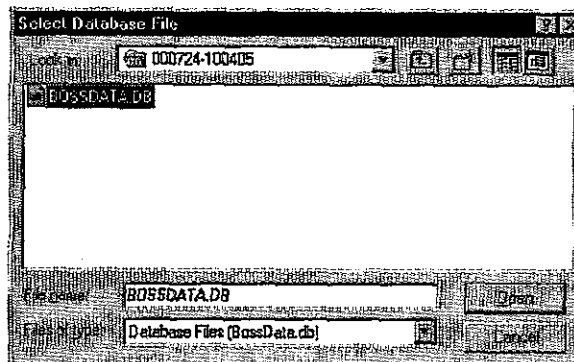


Figure 1-3 Select Database File window.