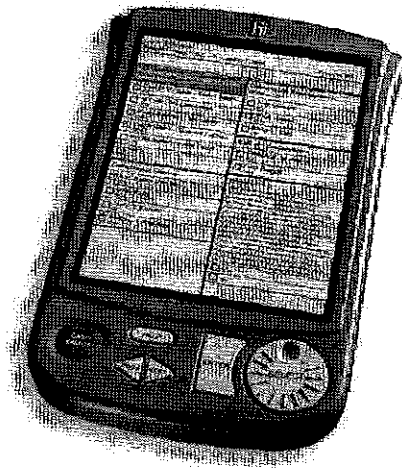
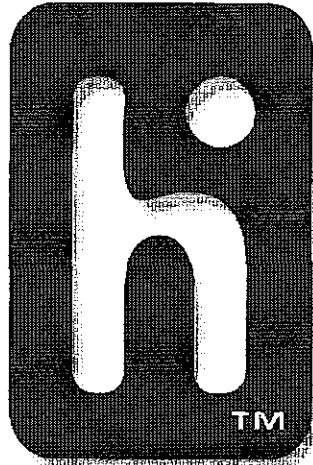


**The  
Hart InterCivic  
eSlate™  
Training Program**



**eSLATE SYSTEM  
MANAGEMENT & TASKS  
TRAINING MANUAL**



# ***eSlate System Management & Tasks***

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## GETTING STARTED:

### Overview

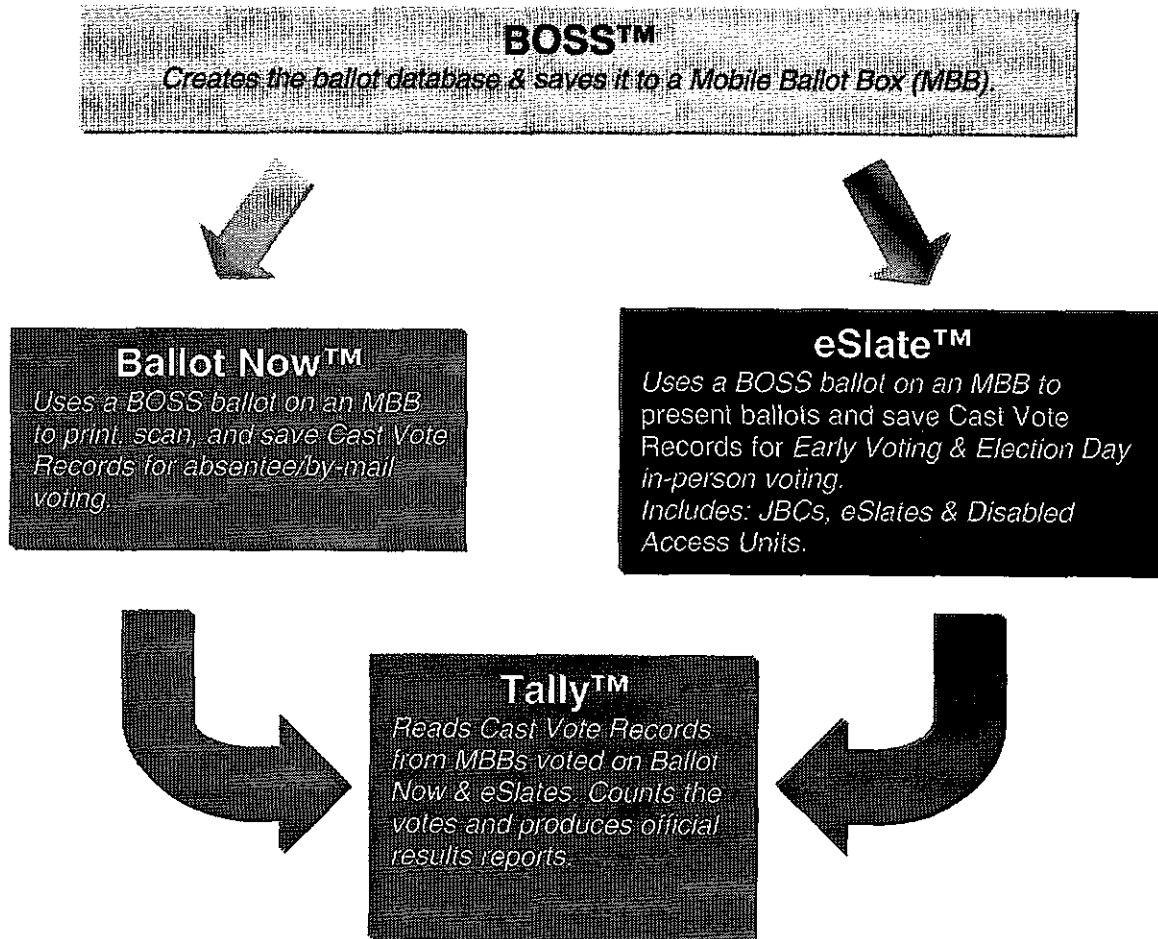
This document is the local Election Administration Office's guide for successfully implementing eSlate-related System management and training functions.

### Objectives

Using this document, Elections Administrators will:

- Have an overall grasp of the eSlate Electronic Voting System.
- Have the information necessary to manage any election using the eSlate Electronic Voting System.
- Have the information available to plan training functions.

## eSlate Data Flowchart



## eSLATE TERMINOLOGY

<b>Term</b>	<b>Definition</b>
<b>ACCESS CODE</b>	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.
<b>ACCESS CODE Summary</b>	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.
<b>Alphanumeric</b>	A field type. Means that the field can contain both letters (alpha) and numbers (numeric).
<b>Americans' with Disabilities Act (ADA)</b>	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.
<b>ASCII file</b>	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".
<b>Audit Trail</b>	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.
<b>Ballot Format</b>	The arrangement of the ballot created in BOSS. Ballots may be formatted for the eSlate PVS or for Ballot Now.
<b>Ballot Instructions</b>	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.
<b>Ballot Now™</b>	The eSlate EVS software application that prints paper ballots on demand and then digitally images the voted ballots to save for delivery to Tally.
<b>Ballot Style</b>	The specific ballot created by precinct assignments to contests in BOSS.
<b>Ballot Text</b>	Instructional text embedded in the ballot. Ballot Text is usually used to identify a section of the ballot.
<b>BOSS™</b>	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™.
<b>Contest</b>	A choice to be made on the ballot. Also known as races, offices, issues, referendums, and questions.
<b>Cast Vote Record (CVR)</b>	Electronic version of each vote cast, reflecting a ballot from each voter.
<b>Crystal Reports</b>	An off-the-shelf report formatting software application for database-centered products.
<b>Cumulative (ACCESS CODE) Summary</b>	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.

<b>Term</b>	<b>Definition</b>
<b>Cyclic Redundancy Check</b>	A continuous test of each transfer of data within a system to insure that the data received at the end of the transfer is the same as the data originated by the source.
<b>Database</b>	A storage point for information (data).
<b>Daily Detail Report</b>	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.
<b>Daily (ACCESS CODE) Summary</b>	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.
<b>Daisy Chain</b>	Items connected in a series. The eSlates are daisy chained, one to another, with one plugging into the JBC.
<b>DAU card</b>	The PC card that enables the DAU eSlate to carry audio and respond to the specialty input devices. Also called an "Audio Card".
<b>Disabled Access Unit™ (DAU)</b>	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 "DAU eSlate".
<b>Direct Record Electronic (DRE)</b>	The election industry term for an electronic machine at which a voter can view and vote a ballot.
<b>Election Identification Report</b>	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.
<b>eSlate Unit</b>	A Hart InterCivic electronic voting input device without audio capability. An electronic ballot is presented on this unit.
<b>eSlate Electronic Voting System (EVS)</b>	The entire system from BOSS to Tally. Includes: BOSS, the Precinct Voting System (see <b>eSlate Precinct Voting System</b> ), Ballot Now, and Tally. Also called EVS or eSlate EVS.
<b>eSlate Precinct Voting System (PVS)</b>	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.
<b>Field</b>	An area available for data entry in a software application, like BOSS or Tally.
<b>Firmware</b>	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.

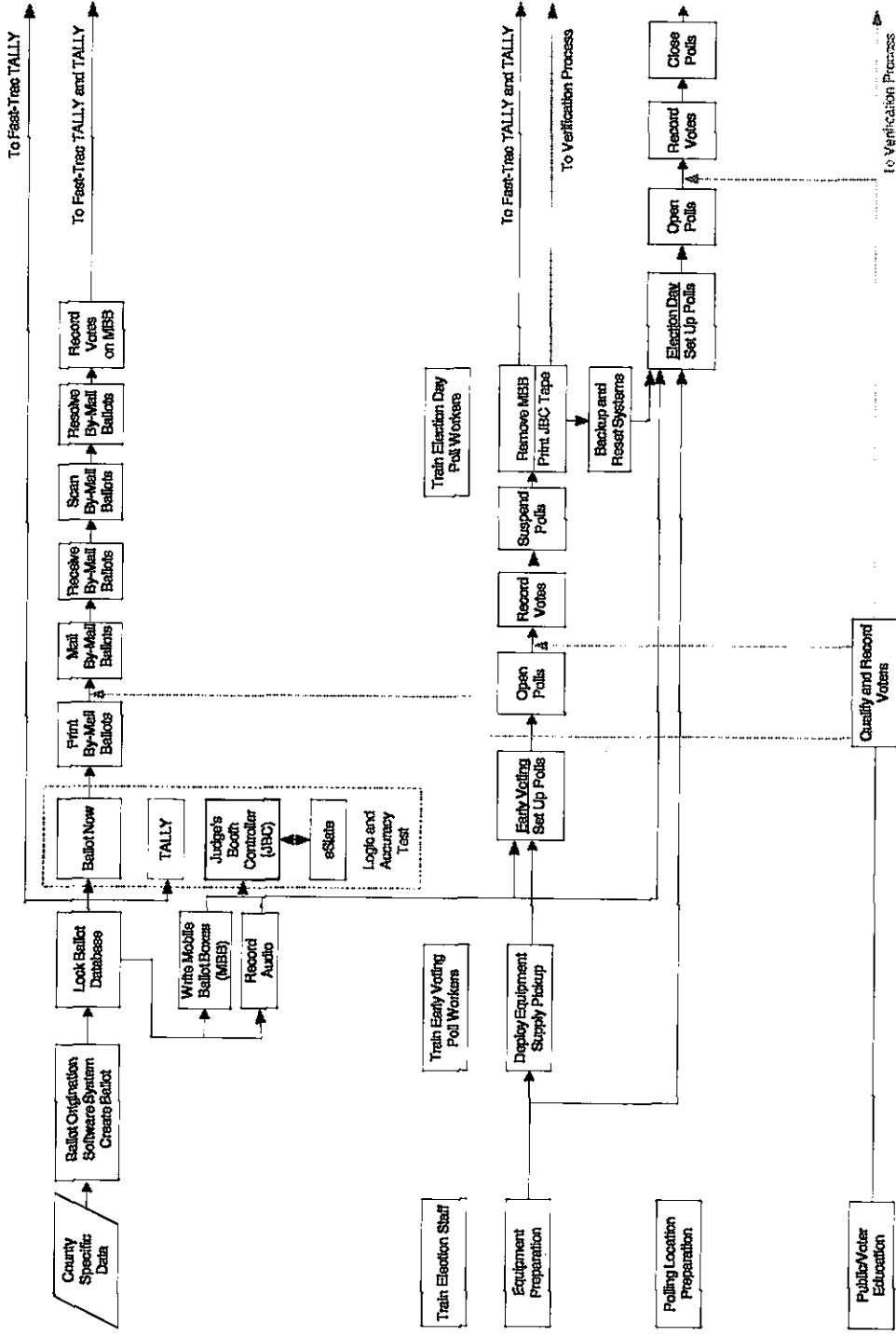


<b>Term</b>	<b>Definition</b>
<b>Flash Memory</b>	Flash memory is reprogrammable, read only memory and is used in PC cards or MBBs. Flash Memory does not require continuous electric power to operate. It is a system that can store more data and work faster than a traditional floppy disk.
<b>Judge's Booth Controller (JBC)</b>	The control unit of the eSlate PVS, through which a poll worker distributes electronic ballots to the eSlate and DAU eSlate.
<b>JBC Initialized Report</b>	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 <b>***PASS***</b> on the report.
<b>Jurisdiction</b>	A precinct or group of precincts managed by a single organization.
<b>Logic and Accuracy Test (L &amp; A)</b>	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 "test deck") through the ballot counting system and comparing the results with the expected results.
<b>Mobile Ballot Box (MBB)</b>	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.
<b>Network Configuration Report</b>	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.
<b>PC Card</b>	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 "PCMCIA" card. In the eSlate Electronic Voting System it is called a Mobile Ballot Box (MBB)
<b>Party</b>	A political party. For example, Democrat or Republican.
<b>Polling Place</b>	Where voters physically go to vote. A single polling place, during early voting, can support multiple precincts.
<b>PUB Count</b>	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.
<b>Precinct</b>	A jurisdiction subdivision for election purposes.
<b>Provisional Voter</b>	A voter who may not meet the qualifications for voting at that polling place, but is allowed to vote on a "provisional ballot" under conditions by state election law. Because the voter is "provisional", his/her ballot must be retrievable by election officials under certain conditions that vary from state to state. Also called a voter with a "challenged ballot".
<b>PVT Count</b>	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.
<b>Retrieval Code</b>	A unique number assigned to a provisional ballot to enable swift retrieval of that ballot from the eSlate system by election officials.
<b>Select Wheel</b>	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.

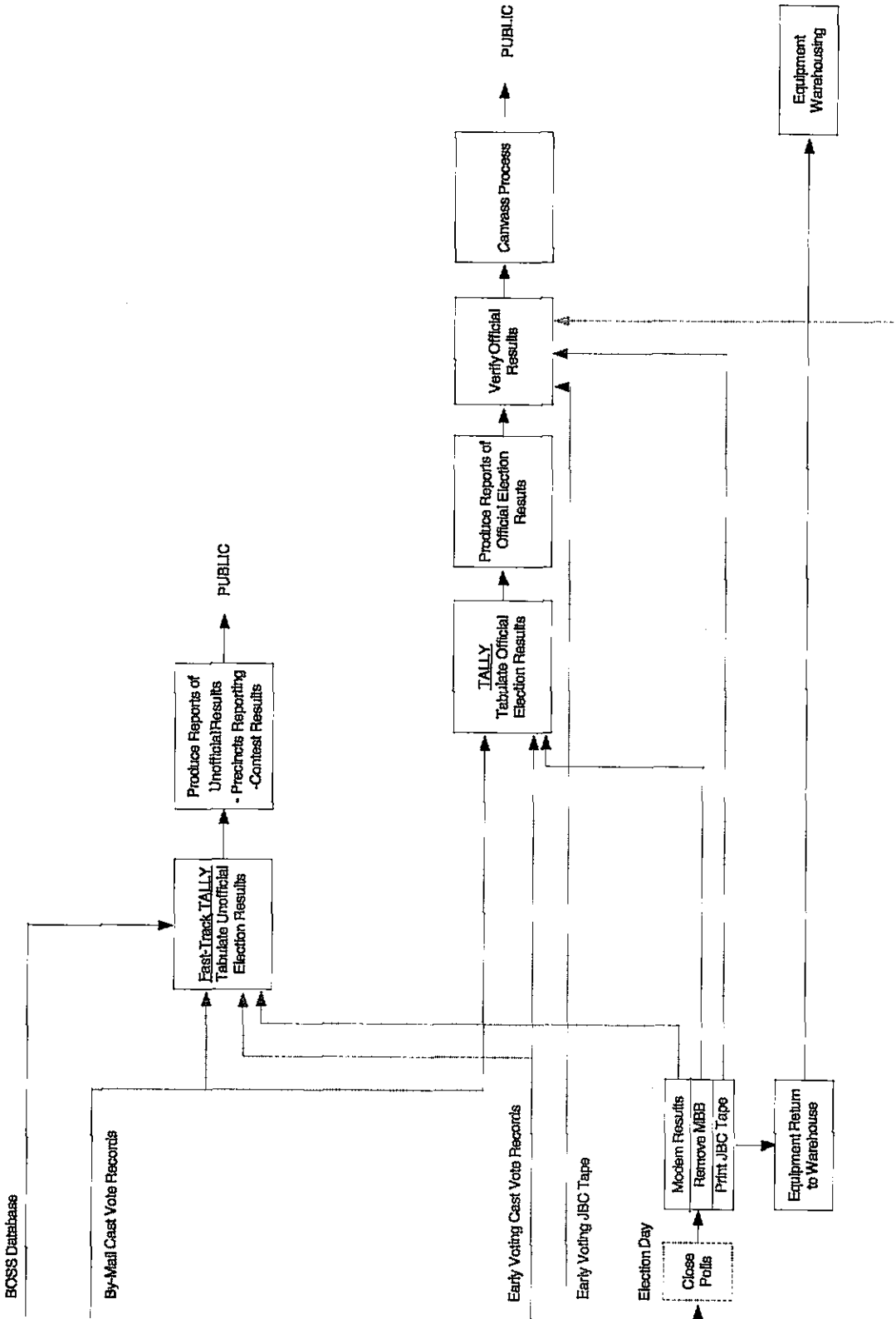
<b>Term</b>	<b>Definition</b>
<b>Sip &amp; Puff</b>	An input device that connects to the DAU eSlate in the handicap access jack. This enables voters with disabilities with extremely limited mobility to vote with a mouth-controlled device.
<b>Split Precinct</b>	The smallest division of a precinct for election purposes.
<b>Spoiled Ballot</b>	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.
<b>Suspend Report</b>	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.
<b>Tactile Input Switches</b>	Also called "jelly switches" or "jelly buttons". Red and green "paddles" 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.
<b>Tally™</b>	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.
<b>Tally Report</b>	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.
<b>Thrown-out Ballot</b>	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.
<b>UPS</b>	Uninterruptible Power Supply.
<b>Voter Registration Computer</b>	An electronic poll book. Sometimes known as a "thin client".
<b>Zero Tape Report</b>	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.

# eSLATE ELECTION-RELATED MANAGEMENT

## eSlate Workflow Chart Hart InterCivic eSlate Electronic Voting System Workflow



# eSlate System Management & Tasks Hart Intercivic eSlate Electronic Voting System Workflow (continued)



Combo Form

### Election-Related Tasks Checklist

Use the following checklist to manage eSlate election-related tasks.

Color Key:

Color:	Meaning:
	Training Event
	BOSS Process
	Tally Process
	Ballot Now Process
	Public Outreach-Related
	eSlate Support Procedures Item
	Live Voting Event

eSlate-Related Items:	More Information:
<input type="checkbox"/> Train Elections Staff, including support personnel, in eSlate Polling Place Operations and components.	
<input type="checkbox"/> Receive PC hardware and eSlate software, configure, test, and set up systems.	
<input type="checkbox"/> Train Elections Administrators in eSlate System Management & Tasks	
<input type="checkbox"/> Receive eSlate hardware.	
<input type="checkbox"/> Train Support Personnel in Acceptance and Functionality Test procedures.	
<input type="checkbox"/> Support Personnel conduct Acceptance and Functionality Test.	Document Acceptance and Functionality Testing with JBC, eSlate, and DAU eSlate logs (☞ see page 41).
<input type="checkbox"/> Train Elections Staff in eSlate system software and functions specific to their positions.	Train BOSS operators, Ballot Now operators, Tally operators, and Support Personnel. For a training assignment log see page 61.
<input type="checkbox"/> Create precinct spreadsheet for import to BOSS.	Or key precinct information directly into BOSS when creating the ballot.
<input type="checkbox"/> Create polling place spreadsheet for import to BOSS.	Or key polling place information directly into BOSS when creating the ballot.
<input type="checkbox"/> Create "State" spreadsheet for import to BOSS.	Or key contest information directly into BOSS when creating the ballot.
<input type="checkbox"/> Create election ballot in BOSS, including audio.	DO NOT generate ballot or write MBBs yet.
<input type="checkbox"/> Print BOSS reports, proofread, and make corrections	<b>1<sup>st</sup> ballot proofread</b> – before MBBs are created
<input type="checkbox"/> Generate ballot, add remaining audio, and write MBBs and DAU cards.	Document MBB ID numbers with "JBC/MBB Tracking Log" (☞ see page 45).
<input type="checkbox"/> Proofread from eSlate, ballot and audio. Proofread BOSS reports again.	<b>2<sup>nd</sup> ballot proofread</b> – after MBBs are created

**eSlate Election-Related Management  
Election-Related Tasks Checklist (cont.)**

<b>eSlate-Related Items (cont.):</b>	<b>More information:</b>
<input type="checkbox"/> Copy BOSS database forward and make corrections, if needed.	Repeat proofreading process, generate ballot, create MBBs and DAU cards, document with new "JBC/MBB Tracking Log".
<input type="checkbox"/> Export Audio to hard drive or CD file.	
<input type="checkbox"/> Lock original BOSS database for Tally.	
<input type="checkbox"/> Copy BOSS database to CD.	
<input type="checkbox"/> "Round Trip" the ballot.	<b>3<sup>rd</sup> ballot proofread</b> - Use "Test" cards to vote on the eSlates, print Ballot Now ballots, mark and scan, and read MBBs into Tally. Document any ballot errors.
<input type="checkbox"/> Copy BOSS database forward and make corrections, if needed.	Repeat proofreading process, generate ballot, create MBBs and DAU cards, document with new "JBC/MBB Tracking Log".
<input type="checkbox"/> Political Subdivisions proofread ballot.	<b>Final ballot proofread.</b>
<input type="checkbox"/> Copy BOSS database forward and make corrections, if needed.	Repeat proofreading process, generate ballot, create MBBs and DAU cards, document with new "JBC/MBB Tracking Log".
<input type="checkbox"/> Create all MBBs and DAU cards for Election.	Create 1 MBB per JBC, 1 MBB per Ballot Now PC (if utilized), at least 1 MBB for Servo, 1 DAU card per DAU eSlate, and 2-10% excess MBB and DAU cards.
<input type="checkbox"/> Lock final BOSS database for Tally.	
<input type="checkbox"/> Copy BOSS database to CD.	
<input type="checkbox"/> Perform Logic & Accuracy Test.	Document L&A with "Logic & Accuracy Test Log" (☞ see page 44).
<input type="checkbox"/> Print Ballot Now by mail ballots.	
<input type="checkbox"/> Mail Ballot Now by mail ballots.	
<input type="checkbox"/> Receive Ballot Now by mail ballots.	Ongoing, through a date established in state guidelines.
<input type="checkbox"/> Scan Ballot Now by mail ballots.	Ongoing, through a date established in state guidelines.
<input type="checkbox"/> Conduct public education campaign.	Ongoing through Election Day.
<input type="checkbox"/> Prepare MBB Processing Procedure for Early Voting by mail, Early Voting in Person, Election Day and at the Central Counting Station Daily.	
<input type="checkbox"/> Establish EV polling place locations, and logistics of voter traffic, furniture, electrical supply, and equipment security.	<b>Plan:</b> <input type="checkbox"/> Amount of equipment needed, <input type="checkbox"/> Layout, <input type="checkbox"/> AC power sources, <input type="checkbox"/> Battery backup procedures and equipment, <input type="checkbox"/> Security, <input type="checkbox"/> Storage.

**eSlate Election-Related Management  
Election-Related Tasks Checklist (cont.)**

<b>eSlate-Related Items (cont.):</b>	<b>More information:</b>
<input type="checkbox"/> Plan EV and ED support for Help Desk and in-person support personnel at polling places.	<input type="checkbox"/> Establish procedures for using a Help Line Log (☞ see page 58).
<input type="checkbox"/> Prepare EV election equipment in the warehouse.	<p><b>This includes:</b></p> <input type="checkbox"/> Functionality testing, <input type="checkbox"/> Resetting eSlate systems to zero Public CVR count, <input type="checkbox"/> Installing MBBs, <input type="checkbox"/> Installing JBC Red Wire Security Seals, <input type="checkbox"/> Starting the JBC & eSlate Serial Number Log (☞ see page 47), <input type="checkbox"/> Starting the Ballot & Seal Certificate documents (☞ see page 46), <input type="checkbox"/> Performing pre-assigning polling place identification steps, if applicable, <input type="checkbox"/> Cleaning equipment.
<input type="checkbox"/> Establish EV staging, pickup, and delivery procedures and routines, including equipment return procedures and JBC/MBB processing procedures.	
<input type="checkbox"/> Train EV Elections Lead Poll workers and Alternates in the Polling Place Operations Course.	
<input type="checkbox"/> Train EV Poll workers in the Poll worker's eSlate Operations Course.	
<input type="checkbox"/> Perform any final EV polling place preparations required.	
<input type="checkbox"/> Deploy and distribute EV equipment.	
<input type="checkbox"/> Conduct Early Voting.	<p><b>Also need:</b></p> <input type="checkbox"/> Daily JBC Report Envelopes for collecting JBC Diagnostics Reports, Zero Reports, Polls Suspended Reports, Aborted Codes Reports, and expired ACCESS CODES. One envelope per day, per JBC. <input type="checkbox"/> Main JBC Reports Envelopes, one per JBC, per election, for collecting the daily envelopes. <input type="checkbox"/> Envelopes for collecting JBC "Provisional Ballot" stubs (retrievable). <input type="checkbox"/> Reconciliation log for comparing voters checked in to JBC public count (☞ see page 48). <input type="checkbox"/> Canceled Booth Log (☞ see page 57).
<input type="checkbox"/> Train ED Elections Lead Poll workers and Alternates in the Polling Place Operations Course.	Consider eSlate specific election supplies and how election document envelopes are managed (☞ See Appendix B: eSlate Equipment List, page 29).