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**SERVO**



*SERVO*

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*eSlate™ Electronic Voting System*

*SERVO*

*Operations Manual*

Software V. 1.0

*Hart InterCivic  
Election Solutions Group*

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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.

# SERVO



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# SERVO



## About This Book

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### Main Topics

**Overview**, this page.

- **Important terms to know** on page 8.
- **Environment for SERVO** on page 8.
- **Features of SERVO** on page 9.

**How this book is organized** on page 9.

**Audit Logs** on page 10.

- **SERVO audit log** on page 10.
- **Backed-up devices audit logs** on page 10.

**Documentation Roadmap** on page 11.

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### Overview

This manual describes how to use the SERVO™ software application, which is referred to as SERVO throughout this manual.

SERVO is an election records and recount management system for the eSlate™ Precinct Voting System (PVS), which is part of the Hart InterCivic, Election Solutions Group's eSlate™ Electronic Voting System.

SERVO uses the triple redundancy features of the eSlate™ Electronic Voting System to their fullest advantage. Election results are initially generated from the direct reading of voted MBBs into Tally. SERVO-generated recount data from the JBC and eSlate memories can also be used to compare against the MBB results, creating a distributed, closed-loop process that provides redundant cross verification of election results. This makes recounting of election results part of every election cycle, increasing system reliability and security.

SERVO is installed by Hart InterCivic personnel.

## Important terms to know

Terms used in SERVO are explained in **Table 1**.

**Table 1** Terms used in SERVO

<b>Administrator</b>	A SERVO user with ALL privileges.
<b>Audit log</b>	Information that allows election officials to reconstruct an election and verify the results without compromising ballot and voter secrecy.
<b>CVR</b>	Cast vote record. A record containing the votes cast by an individual voter on an eSlate.
<b>DAU</b>	Disabled Access Unit. An eSlate designed with access for the disabled.
<b>device</b>	A JBC or an eSlate from Hart InterCivic's eSlate Precinct Voting System (PVS).
<b>eSlate</b>	The Hart InterCivic electronic voting unit that presents the ballot to the voting public and accepts their selections.
<b>Event</b>	A specific backup of a set of devices in SERVO. Each Event relates directly to either an Election, a TEST Election, or a demonstration Election.
<b>JBC</b>	Judge's Booth Controller. The PVS controller unit for up to 12 eSlate/DAU units. The controller unit is used to generate access codes for the voter.
<b>MBB</b>	Mobile Ballot Box. The flash card stores ballot information for an Election. The JBC uses the MBB to send out ballot information to the eSlates. It records CVRs and audit logs. Voted MBBs are read into the Tally System.
<b>PVS</b>	Precinct Voting System. A set of one JBC connected to eSlate/DAU units.
<b>SERVO audit log</b>	Transactions that have taken place since SERVO was installed on the computer.
<b>SERVO database</b>	The database that stores the backup data to maintain an ongoing record of equipment use. The same database is used for each subsequent use of the equipment whether for Election, Test or Demonstration use.
<b>Tally</b>	eSlate Electronic Voting System tabulation software.

## Environment for SERVO

A jurisdiction will have the option of using SERVO for each election in which PVS equipment is used. SERVO will typically be used prior to deployment of JBCs and eSlates, and at the conclusion of an election.

SERVO is intended to be used at a jurisdiction's warehouse, where all of the PVS devices are stored. A conveyor line will lead up to the PC running SERVO, where one PVS device after another will get attached to a parallel cable for processing.

## Pre-Election

PVS devices will be added to the SERVO database and reset.

Resetting of the devices includes:

- ◆ erasing any cast vote records to achieve zero-public-count,
- ◆ erasing internal audit logs that may exist from a previous election or testing on each device,
- ◆ setting the clock on a JBC.



## Post-Election

The bulk of the work within SERVO begins after an election has been carried out. SERVO is used to download CVRs and internal audit logs of each device, which constitutes a backup of the device's data. From the backed-up data:

- ◆ election recounts may be performed and tabulated via Tally,
- ◆ lost or damaged MBBs may be recovered, and
- ◆ several reports may be run against the data.

## Features of SERVO

SERVO has the ability to automatically detect a connected device (JBCs and eSlates) in order to perform an action on that device.

SERVO creates a database of:

- ◆ the public serial numbers of PVS equipment maintained by a jurisdiction, and
- ◆ backups of CVRs and audit logs from eSlates and JBCs used in an election.

The primary purposes of the SERVO database are:

- ◆ to maintain on-going equipment history and
- ◆ to supply election records as required.

SERVO provides:

- ◆ reports on CVRs, audit logs, equipment used
- ◆ recount data that can be supplied to the eSlate™ Electronic Voting System's Tally software application,
- ◆ ability to make recovery MBBs,
- ◆ ability to reset PVS devices to zero count for the next election, and
- ◆ ability to reset the JBC clock.

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## How this book is organized

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**Chapter 1 Getting Started** — Describes how to log in to SERVO and connect PVS devices.

**Chapter 2 Event Administration** — Describes how to add an Event.

**Chapter 3 Equipment Administration** — Describes how to add a device, back up device data to an event, reset a device, and set the clock on the JBC.

**Chapter 4 Election Recount** — Describes how to create recount data from the backed-up data from either the JBCs or the eSlates used in an election in a format readable by Tally.

**Chapter 5 MBB Recovery** — Describes how to recover MBB data if an MBB is lost or damaged.

**Chapter 6 Reports** — Describes the reports available in SERVO.

**Chapter 7 User Administration** — Describes how the Administrator manages user names, passwords, and privileges.

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## Audit Logs

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### SERVO audit log

Each major user action in SERVO is saved to an internal audit log. The SERVO audit log specifies the user, type of action that took place, and date and time of the action. The audit log is not specific to an Event. Actions saved are:

- ◆ Login
- ◆ Add event
- ◆ Add device
- ◆ Backup device
- ◆ Reset a device
- ◆ Set JBC clock
- ◆ JBC Recount
- ◆ eSlate Recount
- ◆ MBB recovery
- ◆ Report generation

(See **SERVO Internal Audit Report** on page 63.)

### Backed-up devices audit logs

The internal audit logs backed-up from PVS devices contain information that will allow election officials to reconstruct an election and verify the results without compromising ballot and voter secrecy.

(See **Device Audit Log (search) Report** on page 51 and **Device Audit Log Report** on page 54.)

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## Documentation Roadmap

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

### ***eSlate™ SERVO™ Operations Manual (this book)***

This manual describes how to add PVS equipment public serial numbers to the SERVO database and backup election data from PVS equipment used during testing or during an election. Additional instructions are provided for creating recount data, creating recovery MBBS, and user administration. The SERVO reports are also described.

### ***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 Judge's Booth Controller™ (JBC) and eSlate™ 3000 and DAU 5000™ voting units in a polling place, and with Ballot Now™ to handle paper ballots.

### ***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.

### ***eSlate™ Tally™ System Operations Manual***

This manual describes how to use the Tally™ application software to read and tally the votes on MBBS that were used during an election.

### ***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.



# SERVO



# Chapter 1

## Getting Started

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### Main Topics

**Overview**, this page.

- **Pre-election tasks**, this page.
- **Post-election tasks** on page 14.

**Equipment Needed** on page 14.

- **Device connections** on page 15.

**Starting the SERVO Application** on page 16.

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### Overview

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

The intended user of SERVO needs a solid working knowledge of how to:

- ◆ use a Windows PC,
- ◆ attach and detach cables to a PC, a JBC, and an eSlate, and
- ◆ insert an MBB into the PC-card drive.

In addition, good organizational skills are desired in order to establish a warehouse workflow.

### Pre-election tasks

The overall process of using SERVO to prepare the JBCs and eSlates for use in an Election is quite simple.

### JBC preparation

JBCs must be reset prior to deploying to polling places.

One at a time, a JBC is connected to the SERVO PC and to a power outlet. The public serial number of the JBC is added to the SERVO database if it does not currently exist in the database. The JBC is reset.

Then the JBC is ready to send out to the polling places.

## eSlate preparation

eSlates must be reset prior to deploying to polling places.

With a JBC connected to the SERVO PC, one at a time an eSlate is connected to that JBC with a JBC-to-Booth cable. The public serial number of the eSlate is added to the SERVO database if it does not currently exist in the database. The eSlate is reset.

Then the eSlate is ready to send out to the polling places.

**NOTE:** The same JBC can be used to reset all eSlates in the inventory.

## Post-election tasks

After an Election the devices (JBCs and eSlates) are brought back to the warehouse and backed-up into an Event. The Event could have been created prior to equipment deployment, or at the moment that the backup process begins.

**NOTE:** A single Event is used for the backup of the Election (or Test).

## JBC backup

The user selects an Event for the backup, then one at a time, a JBC is connected to the SERVO PC and to a power outlet. The public serial number of the JBC is added to the SERVO database if it does not currently exist in the database. The CVRs and internal audit log in the JBC are added to the SERVO database.

## eSlate backup

With a JBC connected to the SERVO PC, one at a time an eSlate is connected to that JBC with a JBC-to-Booth cable. The public serial number of the eSlate is added to the SERVO database if it does not currently exist in the database. The CVRs and internal audit log in the eSlate are added to the SERVO database.

## Recount MBBs

For recount MBBs, a blank MBB is used.

## Recovery MBBs

For recovery MBBs, a blank (unvoted) BOSS MBB from the Election is used.

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## Equipment Needed

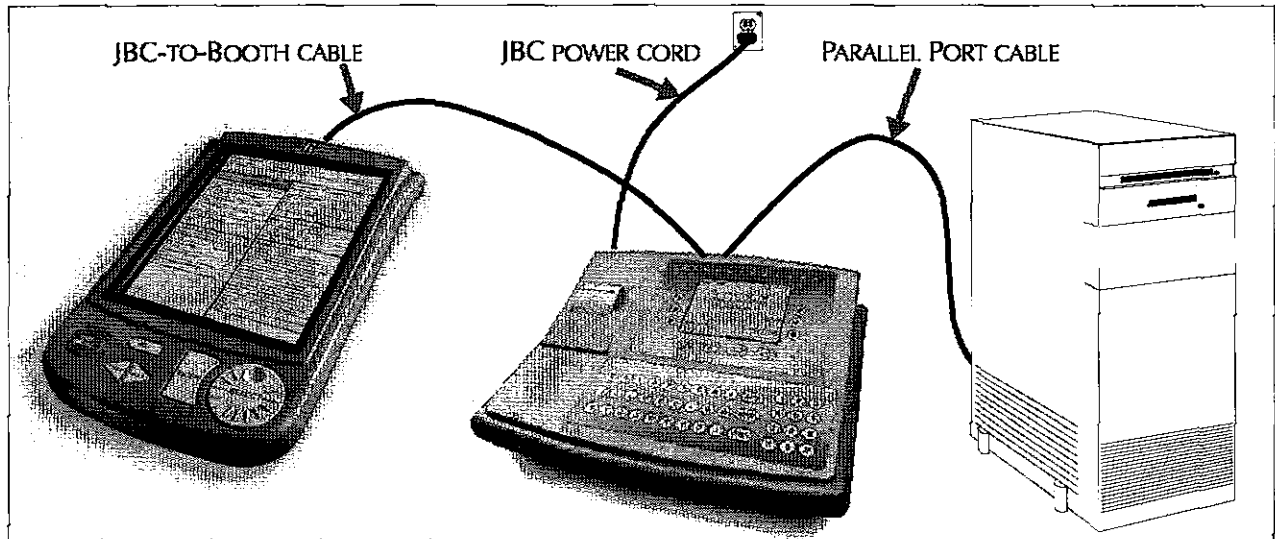
---

In addition to the SERVO PC and the JBCs and eSlates, you will need:

- ◆ 1 parallel cable
- ◆ 1 JBC-to-Booth cable
- ◆ 1 JBC power cord
- ◆ 1 BOSS MBB from the Election (or Test)

## Device connections

Connections to the SERVO PC are illustrated in **Figure 1-1**.

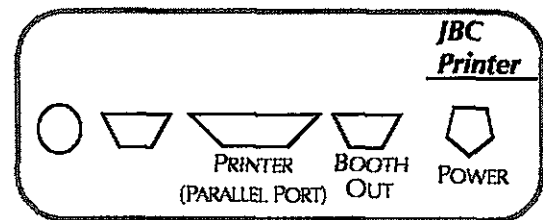


**Figure 1-1** Device connections.

### JBC connection

SERVO connects to a JBC through an available/ dedicated standard EPP parallel port on the PC. This connection allows SERVO to communicate with an eSlate connected to a JBC.

- ◆ A parallel cable is plugged into the SERVO PC's parallel port and into the JBC's printer port.
- ◆ The JBC is connected to a power outlet.



**Figure 1-2** Connectors on back of JBC.

### eSlate connection

A JBC that is connected to the SERVO PC with the parallel port cable is required to communicate with an eSlate.

- ◆ The eSlate is connected to the JBC with a JBC-to-Booth cable.
- ◆ Only one eSlate at a time should ever be attached to a JBC.
- ◆ If the JBC has already been backed-up for a given Event, SERVO will back up the eSlate connected to the JBC.

## Starting the SERVO Application

A User ID and password are required to start the SERVO application. If you do not know your User ID and/or password, contact your System Administrator.



It is recommended that the user currently logged in:

- ◆ stay at the computer while running the SERVO application
- ◆ exit the SERVO application if they step away from the system

## Steps for: SERVO Logon

✓ To start the SERVO application:

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

2 From the **Start** menu, choose **Programs-->Hart InterCivic-->Servo.**

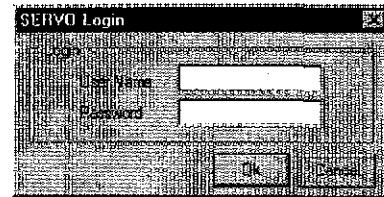
The **Hart InterCivic - SERVO** window appears with the **SERVO Login** window in the foreground (see **Figure 1-3**).

3 In the **User Name** field, type your user ID.

4 In the **Password** field, type your password.

Click .

The **SERVO Login** window closes and the menus available to the user appear enabled in the **Hart InterCivic - SERVO** window.




**Figure 1-3 SERVO Login window.**

**NOTE:** The actions a user can perform within SERVO are dependent upon the permission level set by the Administrator.

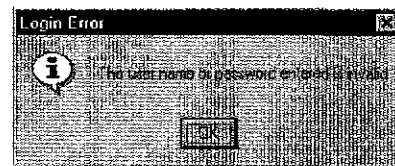
## Notes about log in

✓ If you enter an invalid User Name and/or invalid password, the error message shown in **Figure 1-4** appears.

1 Click  in the error message dialog box.

2 In the **SERVO Login** window, enter a valid User Name and a valid password.

3 Click  in the **SERVO Login** window.



**Figure 1-4 Login Error dialog box.**





## Defining an Event

Each time you need to connect devices to the SERVO PC for backing up the Election data on the devices, you will create a new Event.

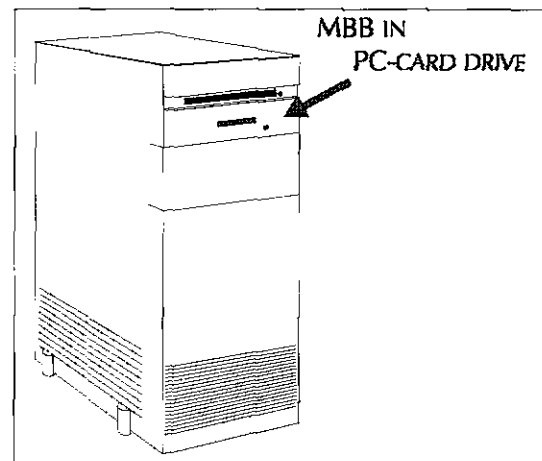
Before equipment used in an Election can be backed up, an Event must be created using the **Add** command in the **Event** menu (see **Figure 2-2**).



**Figure 2-2** Event menu.

Possible events might include Election, Test, or Demonstration.

- ◆ Each Event must be given a unique name. It is recommended that the name you give to the Event closely represents the title of the election. For example, Events might be named:
  - 2002 Primary Training DEMO
  - 2002 Primary TEST
  - 2002 Primary Election
- ◆ An MBB from the Election, Test, or Demonstration is required to create the Event. It is the Election MBB that contains the ballot format for the Election, Test, or Demonstration (that is, the contest and option titles, precinct titles, and so forth). The MBB provides the basis for generating SERVO reports, recount MBBs, and recovery MBBs.




**Figure 2-3** MBB inserted for creating an Event.

There are one of two ways in which events may be added to SERVO:

- ◆ The first is through the **Add Event** window. In the **Add Event** window, you can simply enter a unique name for the Event and insert the Election MBB into the PC-card drive.
- ◆ The other is through the **Backup Device** dialog, which automatically forces to you create an Event, if no Events exist in the SERVO database (see **Backing Up a Device** on page 24).

## Steps for: Adding an Event

In order to add an Event, the user must have **Event Administration** privileges. Privileges for a user are defined by the Administrator.

- ✓ To add an Event:
  - 1 Insert the MBB for the Election into the PC-card drive.
  - 2 From the **Event** menu, select **Add** (see **Figure 2-2**),
    - OR – click , the **Add Event** tool.

The **Add Event** window appears (see **Figure 2-4**).

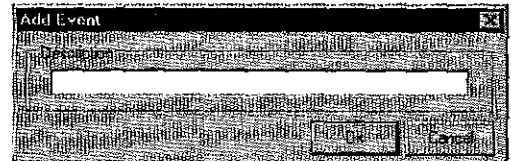



Figure 2-4 Add Event window.

- 3 In the **Description** field, type the name of the Event (see **Figure 2-5**).
- 4 Click .
 

You will know the Event has been created in the SERVO database when the **Add Event** window closes.

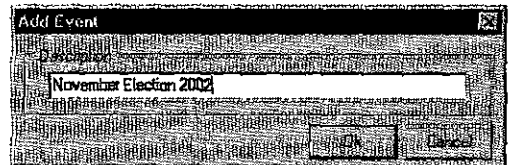



Figure 2-5 Add Event window showing a name defined for the Event.

### Notes about adding an Event

- ✓ If the MBB for the Event has not been inserted into the PC-card drive, the message shown in **Figure 2-6** appears.
  - 1 Insert the MBB for the Event into the PC-card drive.
  - 2 Click  to close the dialog box.
 

The Event is created in the SERVO database.

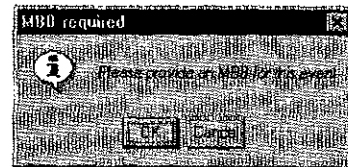




Figure 2-6 MBB required dialog box.

- ✓ If the name you typed for the Event in the **Description** field of the **Add Event** window has already been used as the name of an Event in the SERVO database, the message shown in **Figure 2-7** appears.
  - 1 Click  to close the dialog box.
  - 2 In the **Description** field of the **Add Event** window, type a unique name for the Event.
  - 3 Click  in the **Add Event** window.
 

The Event is created in the SERVO database.

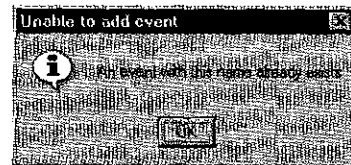


Figure 2-7 Unable to add event dialog box.

---

## **Closing an Event**

---

NOT IMPLEMENTED.

---

---

## **Assigning Devices to an Event**

---

NOT IMPLEMENTED.

---

---

## **Archiving Events**

---

NOT IMPLEMENTED.

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# SERVO



# Chapter 3

## Equipment Administration

### Main Topics

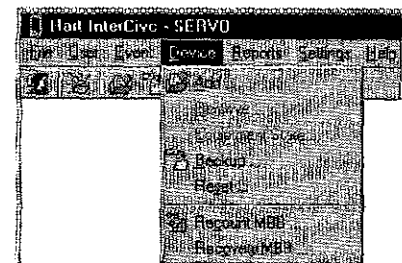
<p><b>Overview</b>, this page.</p> <ul style="list-style-type: none"> <li>• <b>Pre-Election</b> on page 22.</li> <li>• <b>Post-Election</b> on page 22.</li> </ul>
<p><b>Adding a Device</b> on page 22.</p>
<p><b>Backing Up a Device</b> on page 24.</p> <ul style="list-style-type: none"> <li>◆ <b>Notes about backing up a device</b> on page 26.</li> </ul>
<p><b>Resetting a Device</b> on page 27.</p>
<p><b>Importing an Equipment List</b> on page 28.</p>

### Overview

You will use the **Device** menu (see **Figure 3-1**) to interact with the JBCs and eSlates in the inventory before and after an Election. The equipment management tasks include:

- ◆ adding a device's public serial number to the SERVO database and
- ◆ resetting a device.

The **Recount MBB** and **Recovery MBB** commands on the **Device** menu are described in Chapters 4 and 5, respectively.



**Figure 3-1** Device menu.

## Pre-Election

Prior to an Election, Test Election, or Demonstration, PVS devices will be added to the SERVO database and reset (see **Adding a Device** on page 22).

Resetting of the devices includes:

- ◆ erasing any cast vote records to achieve to zero count,
- ◆ erasing internal audit logs that may exist from a previous election or testing on each device, and
- ◆ setting the clock on a JBC.

## Post-Election

After an Election, Test Election, or Demonstration, the CVRs and internal audit logs of each device will be backed up to the SERVO database.

From the backup data:

- ◆ election recounts may be performed and tabulated via Tally (see **Chapter 4 Election Recount**),
- ◆ lost or damaged MBBs may be recovered (see **Chapter 5 MBB Recovery**), and
- ◆ several reports may be run against the data (see **Chapter 6 Reports**).

## Adding a Device

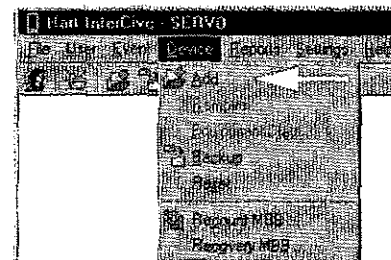
During the process of adding devices to the SERVO database, you will attach a JBC to the parallel cable connected to the PC's parallel port, then subsequently connect an eSlate to that JBC with a JBC-to-Booth cable.

You will use the **Add** command in the **Device** menu to add each device's public serial number to the SERVO database (see **Figure 3-2**).

**NOTE:** This function **does not** add the device to any particular Event.

When you add a device the following information is stored in the SERVO database:

- ◆ Device type, either JBC or eSlate. SERVO cannot distinguish between an eSlate and a DAU
- ◆ Public serial number of the device
- ◆ Firmware revision of the serial number




**Figure 3-2** Device menu.

## Steps for: Adding a device

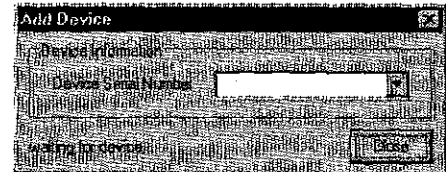
In order to add a device to the SERVO database, the user must have **Equipment Administration** privileges. Privileges for a user are defined by the Administrator.

✓ To add a device:

1 From the **Device** menu, select **Add** (see **Figure 3-2** on page 22),

– OR – click , the **Add Device** tool.

The **Add Device** window appears with the message **waiting for device...** displayed in the bottom left side of the window (see **Figure 3-3**).



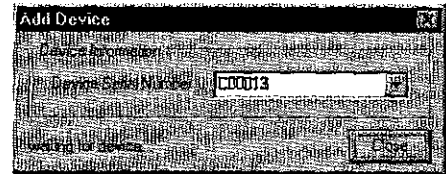
**Figure 3-3** Add Device window.

2 Connect the parallel cable to the SERVO PC.

3 Connect a JBC to power.

4 Connect the JBC to the parallel port cable.

- The public serial number of the JBC appears in the **Add Device** window (see **Figure 3-4**). This indicates that SERVO has added the device information to the SERVO database.
- The message **waiting for device...** displays in the bottom left side of the window (see **Figure 3-4**).



**Figure 3-4** Add Device window showing a device public serial number.


5 If you have eSlates to add, use a JBC-to-Booth cable to connect the JBC to an eSlate.

6 When the device's public serial number appears in the **Add Device** window, you can:

- Disconnect the eSlate from the JBC and connect another eSlate.

–OR–

- Disconnect the JBC from the parallel port cable and from power, then connect another JBC to power and the parallel port cable.

7 When you are finished adding devices, click .

## Backing Up a Device

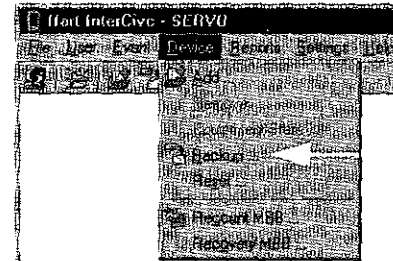
The CVRs and audit logs contained in JBCs and eSlates used for an Election, Test, or Demonstration can be backed up into the SERVO database by connecting each device to the SERVO PC.

The purpose of backing up a device is two-fold:

- ◆ Store a copy of the data in the device in the SERVO database.
- ◆ Allow the device to be reset (or cleared) for use in another election.

You will use the **Backup** command in the **Device** menu to back up a device (see **Figure 3-5**).

**NOTE:** This function requires that you select (or create) an Event, then check/uncheck the **Reset Device** check box and/or check/uncheck **Set Clock** check box BEFORE you connect the device you want to back up.



**Figure 3-5 Device menu.**

When you back up a device:

- ◆ You must associate the device with an Event.
- ◆ If the Event does not yet exist, you will be prompted to add one, along with the MBB associated with that Event.
- ◆ If the device has not previously been added to the SERVO database, the backup device function will automatically add it to the SERVO database.
- ◆ All cast vote records from the device will be retrieved.
- ◆ The number of CVRs from the device will be displayed in the **Backup Device** window.
- ◆ All internal audit log records will be retrieved.
- ◆ The number of audit log entries from the device will be displayed in the **Backup Device** window.
- ◆ A device with zero CVRs will be backed up in the same manner as other devices.
- ◆ When backup is complete, a "ding" will be heard if the PC has a sound system enabled.

## Optional resetting of a device during backup

The **Backup Device** window has check boxes for resetting the device once the backup is complete and verified.

- ◆ When checked, the **Reset Device** check box clears the CVRs and audit log entries from the device.
- ◆ When checked, the **Set Clock** check box sets the internal clock of the JBC device to match the clock on the SERVO PC.


If you do not want to perform backup and reset at the same time, the reset functions can be performed at a later date (see **Resetting a Device** on page 27).



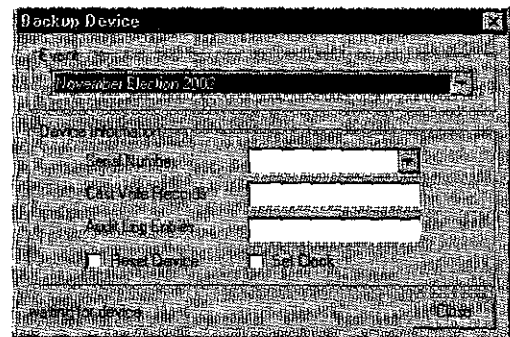
## Steps for: Backing up a device

You will use the **Backup Device** window to back up a device.

When you back up a device:

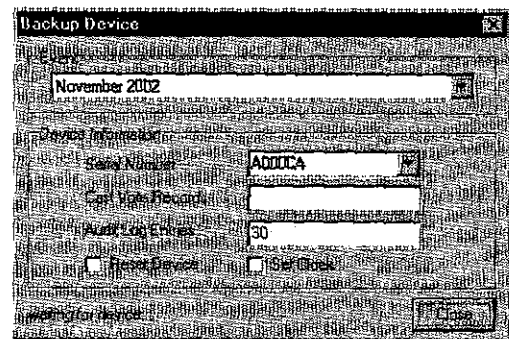
- ◆ Choose an Event to store the backed-up data.
  - ◆ If the Event does not yet exist, you will be prompted to add one, along with the MBB associated with that Event.
  - ◆ Check the **Reset Device** check box and/or **Set Clock** check box if you want to reset the internal clock of the JBC device to match the clock on the SERVO PC after the backup completes.
  - ◆ Connect one device at a time to back up (and reset if desired). SERVO automatically detects a connected device, backs it up (and resets it if desired).
  - ◆ The **Backup Device** window displays the device's public serial number, number of CVRs, and number of audit log entries.
- ✓ To back up a device
- 1 From the **Device** menu, select **Backup** (see **Figure 3-5**),  
 – OR – click , the **Backup Device** tool.

The **Backup Device** window appears with the message *waiting for device...* displayed in the bottom left side of the window (see **Figure 3-6**).



**Figure 3-6 Backup Device window.**

- 2 From the **Event** list box, select the Event that matches the Election data in the device (see **Figure 3-7**).
- 3 If you want to erase any cast vote records and internal audit logs that may exist from a previous election or testing on the device after the backup completes, check the **Reset Device** check box.
- 4 If you want to set the internal clock of the JBC device to match the clock on the SERVO PC after the backup completes, check the **Set Clock** check box.



**Figure 3-7 Backup Device window showing an Event selected.**

- 5 Connect the parallel cable to the SERVO PC.
- 6 Connect a JBC to the parallel port cable.  
 SERVO adds the device information to the selected Event in the SERVO database.