


SERVO

SERVO

eSlate™ *Electronic Voting System*

SERVO™

Operations Manual

Software V. 1.02

*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.



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About This Book

Main Topics

Overview , this page. <ul style="list-style-type: none"> • Features of SERVO on page 8. • Environment for SERVO on page 8. • Important terms to know on page 9. 	Audit Logs on page 10. <ul style="list-style-type: none"> • SERVO audit log on page 10. • Backed-up devices audit logs on page 10.
How this book is organized on page 9.	Documentation Roadmap on page 11.

Overview

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

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

SERVO uses the triple redundancy features of the *eSlate*TM 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.

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.

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 tasks

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 tasks

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.

Important terms to know

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

Table 1 Terms used in SERVO

Administrator	A SERVO user with ALL privileges.
Audit log	Information that allows election officials to reconstruct an election and verify the results without compromising ballot and voter secrecy.
CVR	Cast vote record. A record containing the votes cast by an individual voter on an eSlate.
DAU	Disabled Access Unit. An eSlate designed with access for the disabled.
device	A JBC or an eSlate from Hart InterCivic's eSlate Precinct Voting System (PVS).
eSlate	The Hart InterCivic electronic voting unit that presents the ballot to the voting public and accepts their selections.
Event	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.
JBC	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.
MBB	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.
M2B3	The eSlate Multiple Mobile Ballot Box Bay (M2B3) device has four PC-card slots for reading and writing MBBs.
PC-card drive	The PC-card drive for reading and writing MBBs.
PVS	Precinct Voting System. A set of one JBC connected to eSlate/DAU units.
SERVO audit log	Transactions that have taken place since SERVO was installed on the computer.
SERVO database	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.
Tally	eSlate Electronic Voting System tabulation software.

How this book is organized

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 MBBs with recount data from the backed-up data from either the JBCs or the eSlates used in a 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.

Audit Logs

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 69.)

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 57 and **Device Audit Log Report** on page 60.)

Documentation Roadmap

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

eSlate™ SERVO™ Operations Manual 6000-102 (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 6000-019

This manual describes how to use the Ballot Origination Software System™ software application, referred to as BOSS, to create an Election database from which you can create MBBS (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 6000-053 and 6000-109

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

eSlate™ Precinct Voting System Early Voting Manual 6000-069 and 6000-108

This manual describes how to set up and use the PVS equipment in Early Voting polling places.

eSlate™ Precinct Voting System DAU 5000 Voting Unit Setup Manual 6000-057

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

eSlate™ Tally™ System Operations Manual 6000-049

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

Ballot Now™ Operations Manual 6000-067

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



Chapter 1

Getting Started

Main Topics

<p>Overview, this page.</p> <ul style="list-style-type: none">• Pre-Election tasks, this page.• Post-Election tasks on page 14.
<p>Equipment Needed on page 16.</p> <ul style="list-style-type: none">• Device connections on page 16.
<p>Starting the SERVO Application on page 18.</p>

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, an eSlate, and an M2B3 (Multiple Mobile Ballot Box Bay), and
- ◆ insert an MBB (Mobile Ballot BoxTM) into a slot in the M2B3 or 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-eSlate 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 connected to the SERVO PC and the Election data stored in them is 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 Event is selected 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 Event 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-eSlate 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 Event database.

Recount MBBs

SERVO can create MBBs with recount data in a format readable by Tally. The MBBs are created from either the JBCs' or the eSlates' backup data contained in a SERVO Event.

For recount MBBs, blank (unvoted) BOSS MBBs from the Election are used.

Recount MBBs can be produced for either:

- ◆ Early Voting

OR

- ◆ Election Day voting.

For either type of voting, you can create either:

- ◆ A set of recount MBBs that contains all the CVRs from all the JBCs for an Event.

OR

- ◆ A set of recount MBBs that contains all the CVRs from all the eSlates for an Event.

Recovery MBBs

SERVO can recreate an MBB that has been lost or damaged. This is called a "recovery MBB." The MBB is recreated from the backup of the JBC that contained that MBB.

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

- ◆ In order to create a recovery MBB from the SERVO database, the JBC that contained the MBB must already be backed up in an Event in the SERVO database.

To create a recovery MBB from the SERVO database, you will be required to choose either:

- ◆ The serial number of the missing MBB or
- ◆ The serial number of the JBC that the missing MBB.

Equipment Needed

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

- ◆ 1 parallel cable for connecting the PC to a JBC
 - ◆ 1 JBC-to-eSlate cable
 - ◆ 1 JBC power cord
 - ◆ 1 blank (unvoted) BOSS MBB from the Election (or Test)
- and, if the M2B3 will be used to read and write MBBs instead of the PC's PC-card drive,
- ◆ 1 M2B3
 - ◆ 1 parallel cable for connecting the PC to an M2B3
 - ◆ 1 M2B3 power supply cord

For creating a set of recount MBBS, you will need:

- ◆ Enough blank (unvoted) BOSS MBBs from the Election to hold all the CVRs from the Election. Approximately 100,000 CVRs fit on one 8 MB MBB.

For each recovery MBB you need to create, you will need:

- ◆ 1 blank (unvoted) BOSS MBB from the Election (or Test)

Device connections

Device connections to the SERVO PC and to power are illustrated in **Figure 1-1**.

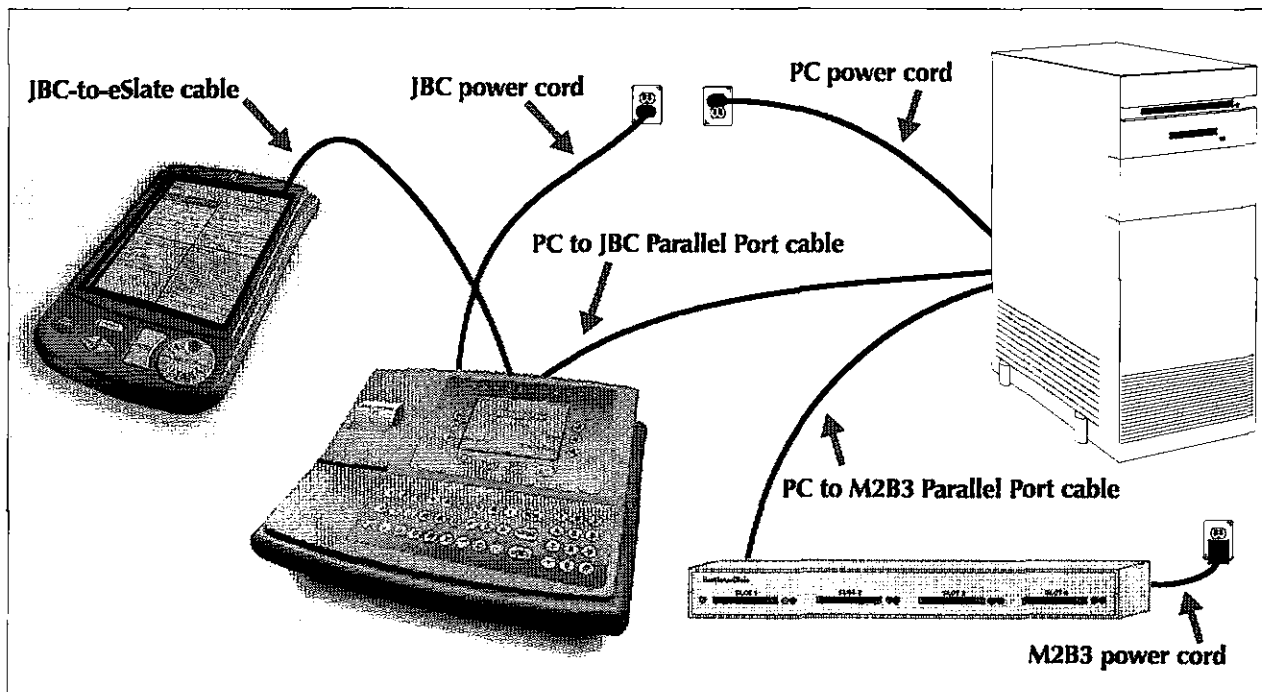


Figure 1-1 Device connections.

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.

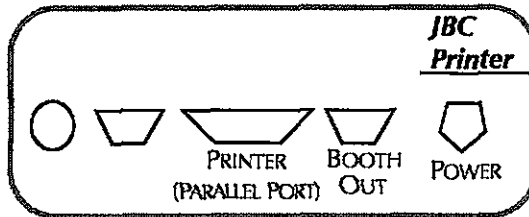


Figure 1-2 Connectors on back of a JBC 1000.

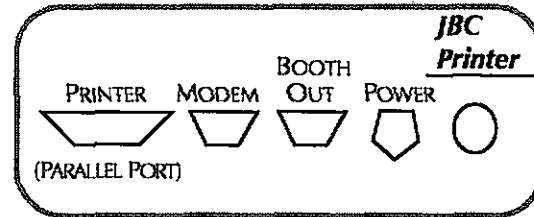


Figure 1-3 Connectors on back of a JBC 1000B.

- ◆ 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.

eSlate connection

An eSlate must be connected to a JBC that is connected to the SERVO PC with the parallel port cable.

- ◆ The eSlate is connected to the JBC with a JBC-to-eSlate cable plugged into the JBC's Booth Out connector.
- ◆ 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.

M2B3 connection

The M2B3 can be used instead of the PC's PC-card drive to write recount MBBs.

The M2B3 is connected to the SERVO PC with a parallel cable plugged into:

- ◆ a parallel connector on the back of the PC and
- ◆ the PARALLEL PORT connector on the back of the M2B3.

The M2B3 is plugged into power with a 12V DC power-supply cable. The power-supply is plugged into:

- ◆ a wall power outlet and
- ◆ the 12V DC INPUT jack on the back of the M2B3 (see **Figure 1-4**).

When the M2B3 is receiving power, the single LED at the far left side on the front of the M2B3 lights GREEN (see **Figure 1-5**).

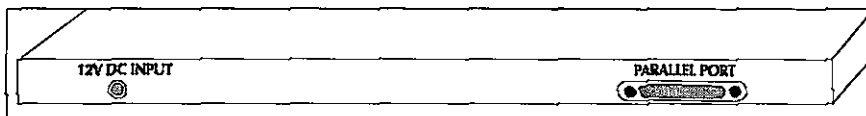


Figure 1-4 Connectors on the back of the M2B3.

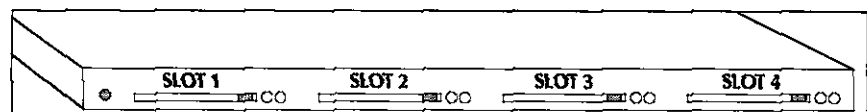


Figure 1-5 Front of the Multiple Mobile Ballot Box Bay (M2B3).

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.

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

✓ 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 (see **Figure 1-6**) in the foreground.

- 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 (see **Figure 1-8** on page 19).

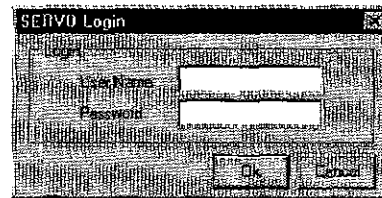


Figure 1-6 SERVO Login window.

Notes about log in



- ✓ If you enter an invalid User Name and/or invalid password, the error message shown in **Figure 1-7** 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 1-7 Login Error dialog box.



Figure 1-8 SERVO window.



Chapter 2

Event Administration

Main Topics

Overview , this page.
Defining an Event on page 22. ◆ Notes about adding an Event on page 23.
Closing an Event on page 24.
Assigning Devices to an Event on page 24.
Archiving Events on page 24.

Overview

Events are used to organize a specific backup of a set of devices in SERVO after voting has occurred. You can think of an Event as equal to some form of an Election. A unique Event is defined for each:

- ◆ Test of an Election
- ◆ Election
- ◆ Demonstration

Events are managed with the commands in the **Event** menu (see **Figure 2-1**).



Figure 2-1 Event menu.

In order to define an Event, you will:

- ◆ use an MBB from the Election to add the ballot format information to the SERVO database and
- ◆ give the Event a unique name.

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.

The Election MBB can be inserted into the M2B3 device or into the PC's PC-card drive (see **Figure 2-3**).

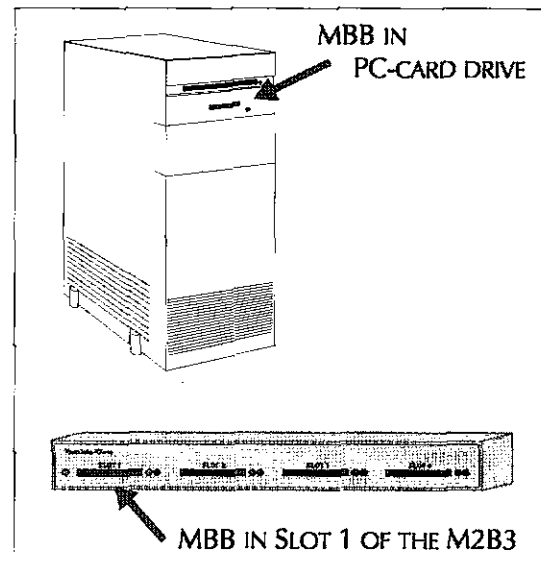



Figure 2-3 MBB inserted for creating an Event.

There are 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 a slot in the M2B3 or into the PC-card drive.
- ◆ The other is through the **Backup Device** dialog, which automatically forces you to create an Event, if no Events exist in the SERVO database (see **Backing Up a Device** on page 28).

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 a slot in the M2B3 or 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**).

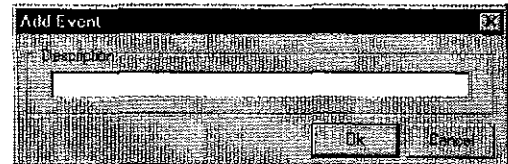



Figure 2-4 Add Event window.

- 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.

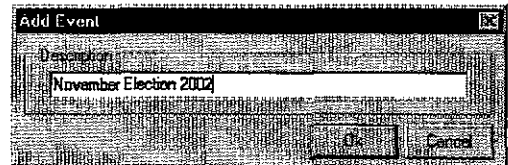



Figure 2-5 Add Event window showing a name defined for the Event.

Notes about adding an Event

- ✓ If the MBB for the Event has not been inserted into a slot in the M2B3 or into the PC-card drive, the message shown in **Figure 2-6** appears.
 - 1 Insert the MBB for the Event into a slot in the M2B3 or into the PC-card drive.
 - 2 Click  to close the dialog box.

The Event is created in the SERVO database.

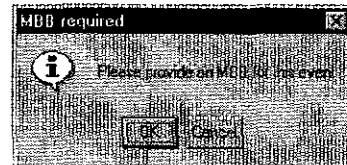




Figure 2-6 MBB required dialog box.

- ✓ 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.

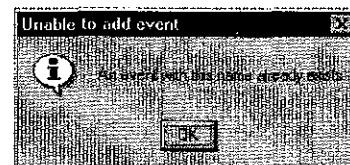


Figure 2-7 Unable to add event dialog box.

Closing an Event

NOT IMPLEMENTED.

Assigning Devices to an Event

NOT IMPLEMENTED.

Archiving Events

NOT IMPLEMENTED.



Chapter 3

Equipment Administration

Main Topics

Overview, this page.

- **Pre-Election tasks** on page 26.
- **Post-Election tasks** on page 26.

Adding a Device on page 26.

Backing Up a Device on page 28.

◆ **Notes about backing up a device** on page 30.

Resetting a Device on page 31.

Importing an Equipment List on page 32.

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.

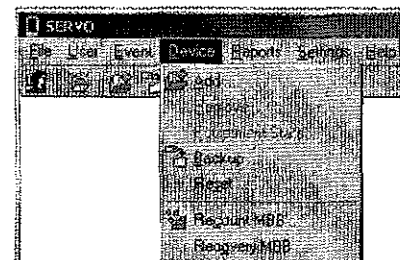


Figure 3-1 Device menu.

Pre-Election tasks

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 26).

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 tasks

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-eSlate 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

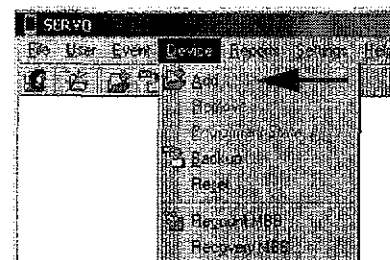



Figure 3-2 Device menu.

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 26),

– 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**).

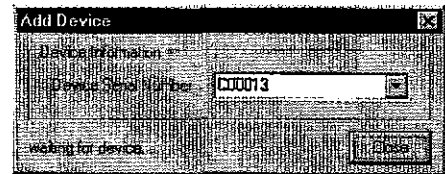


Figure 3-4 Add Device window showing a device public serial number.

5 If you have eSlates to add, use a JBC-to-eSlate 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 .