Clear Design Training
Course Objectives

This training will provide you with:

- An overview of ClearDesign
- Hands-on Exercises
- A summary of the ClearDesign Administrative functions
- An understanding of the general operations and creation of elections in ClearDesign
- Knowledge of ClearDesign’s exporting of files for other Clear Ballot products
ClearDesign Overview
ClearDesign Overview

User Interface Elements

- Tabs - CTRL-Click opens another tab
- Responsive Design: Layout responds to user’s screen size.
- “Breadcrumb” navigation
- Drop down menu

Random Access Navigation
Expand / Collapse

Buttons
Links
ClearDesign Overview
ClearDesign Overview
ClearDesign Overview

**DesignServer** – Computer that is the hub of the system. It runs the ClearDesign software, and hosts the election database.

**Router or Switch** – Device that connects computers in the system.

**DesignStation(s)** – Each station has a computer:
- The Computer runs the ClearDesign election management program that analyzes and assembles data to layout election ballots and to produce necessary export files and ballot images.

**Cables and electrical** – All components must all be connected to AC power and connected to the other components in the system through cable connections to the Router or Switch.
ClearDesign: Security

Security is ensured through the following mechanisms:

- **Access control**
  - User types and their levels of access are set up by the Administrator and are highly customizable
- **Use of a closed network**
- **Security-minded administrative practices**
  - Recommended system hardening procedures
  - Audit logs
  - Restricted access to the BIOS
  - Extraneous programs removed
ClearDesign: User Administration

Login

- On the DesignStation, open a browser (Chrome is recommended)
- Enter the DesignServer name or IP address in the URL field (Usually bookmarked)
- The Clear Ballot login dialog appears

Please sign in

- Enter your user name and password
- Click Sign In
Adding a new Role
  • From the **Home** page, Click Roles in the Navigation menu
  • Click **Add**
Adding a new Role

- Enter a name for the Role
- Specify Password criteria or leave at default settings

Role: Role 100

<table>
<thead>
<tr>
<th>Basic</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>New Role</td>
</tr>
<tr>
<td>Sort Seq</td>
<td>100</td>
</tr>
</tbody>
</table>

Password

- Minimum password length: 8
- Number of different types of characters: 1
- Type of characters are [a-z],[ A- Z],[0-9],[!@#$% ]
- Cannot reuse previous password count: 4
- Must change password every (days): 45
- Failed login account lock count: 3
- Failed login lock time (minutes): 5
Adding a new Role

- On the Permissions tab, select the permissions appropriate for the role
Adding a new User

- From the **Home** page, click **Users** in the Navigation menu
- Click **Add**
ClearDesign: User Administration

- Enter a user **Name** and **Password**
- Select the appropriate **Role**
With the instructor, perform the procedures to add a new user.
ClearDesign: Election Creation

- Click ‘Add’ to begin creating a new election
ClearDesign: Election Creation

With the instructor, perform the procedures to add a new election
ClearDesign: Election Creation

• Enter the name of the election you wish to create
• Identify the date for your election (required)
• Enter your Jurisdiction name
• Enter ‘Officials Title’ (optional)
• Enter ‘Officials Name’ (optional)
• Click ‘Save’
ClearDesign: Election Creation

- Click on the name of your newly created election in the list of elections to open it
ClearDesign: Election Creation

- Click on the items in the left menu to begin entering data from the X-Chart:
  - Skip ‘Languages’ for now
  - Click ‘Voter Groups’ to enter political parties necessary for your election
- The X-Chart includes the American and National parties, but you may add others if you wish
ClearDesign: Election Creation

- Click on ‘District Categories’ in the left menu
  - ‘Jurisdiction Wide’ will exist by default
- Refer to the X-Chart for categories to add
ClearDesign: Election Creation

- To add Districts to the District Categories you just created, click on the name of the first District Category, and then click on ‘Add District’
ClearDesign: Election Creation

• Select ‘Precincts’ form the left menu
• Click on ‘Add’
  • Enter the name of the precinct you wish to add
    • If this precinct doesn’t include Splits, click ‘Save’
    • To add Splits, click on the name of the precinct you just created
  • Then click on ‘Add Split’
• Enter the name of the split
ClearDesign: Election Creation

- Click on the ‘Districts’ tab to assign the districts applicable to each precinct and/or split
- Click on the radio buttons for each district you wish to assign according to the X-Chart
ClearDesign: Election Creation

- Click on ‘Contests’ in the left menu
- Click on ‘Add’
ClearDesign: Election Creation

- Enter the contests you wish to include from the X-Chart
  - Select the contest type from the drop-down menu
  - Select the district applicable to this office
  - Make a selection in the ‘Contest Rotation’ field
- If using ClearCast, make selections if you wish to warn for ‘Over’, ‘Under’ or ‘Blank Vote’
- Select ‘Nonpartisan’ if the office is applicable to all Voter Groups
- Select ‘Auto Generate Write-In’ if you wish to allow write-ins
- Edit the ‘Ballot Text’ using the available formatting tools
- Click ‘Save’ when finished
ClearDesign: Election Creation

- Click on ‘Ballot Sets’ in the left-hand menu
- Click ‘Generate’ from the Ballot Sets tab
  - This creates the relationships between contests, districts, and splits, to automatically create the necessary ballot styles need for the election
ClearDesign: Election Creation

- Click on the ‘Ballots’ tab at the top of the page
  - The resulting list displays all the ballot styles necessary for the election
- Right click on ‘Layout’, then select ‘Open link in new tab’
  - This will open Ballot 1 in a new tab
- Click on the new tab that just opened to display the ballot.
ClearDesign: Election Creation

With the instructor, perform the procedures in the

*ClearDesign Exercise Script – Elections with Import*
ClearDesign Operation: Backing up an election

- Click ‘Backup’
ClearDesign Operation: Backing up an election

- Fill in an easy to remember Validation Code
  - Select ‘Show Validation Code’ to assure accuracy

- The resulting file will be found in your Downloads folder
ClearDesign Operation: Backing up an election

With the instructor, perform the procedures for Backing up an election
ClearDesign Operation: Restoring an Election

- On the Home screen showing the list of elections, click ‘Restore’
ClearDesign Operation: Restoring an Election

- Select ‘Choose File’ to navigate to the zipped Election Backup file
- Enter the Validation Code

- The restored election will be added to the list of elections
ClearDesign Operation: Restoring an election

With the instructor, perform the procedures To restore an election
ClearDesign Operation: Creating a Template

- Click on the name of the restored election to open it
- Click on ‘Edit’ to change the name and other fields as necessary
ClearDesign Operation: Creating a Template

- Starting with ‘Contests’ - Delete all contests
  - Then, work upwards through the election elements deleting all of the content that is variable with each election. Such as Precincts, District Categories, and Voter groups
ClearDesign Operation: Creating a Template

- Click ‘Backup’ to save this election as a Template

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### Basic

<table>
<thead>
<tr>
<th>Name</th>
<th>Clear County Template 14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Name</td>
<td>Clear Cnty 14</td>
</tr>
<tr>
<td>Import ID</td>
<td>Election Data 14.zip</td>
</tr>
<tr>
<td>Last Edit By</td>
<td>Mark@Default</td>
</tr>
<tr>
<td>Election Date</td>
<td>2018-05-16</td>
</tr>
<tr>
<td>Jurisdiction Name</td>
<td>Clear County</td>
</tr>
<tr>
<td>Officials Title</td>
<td>None</td>
</tr>
<tr>
<td>Straight Party Type</td>
<td>None</td>
</tr>
<tr>
<td>Precinct Reporting Threshold</td>
<td>10</td>
</tr>
<tr>
<td>Sort Seq</td>
<td>1430</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Clear</td>
</tr>
<tr>
<td>Export ID</td>
<td></td>
</tr>
<tr>
<td>Last Edit Time</td>
<td>2017-11-13 16:33:35</td>
</tr>
<tr>
<td>Election State</td>
<td>Election Created</td>
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<tr>
<td>Officials Name</td>
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</tr>
<tr>
<td>Cross Endorse Type</td>
<td>On Ballot Once</td>
</tr>
<tr>
<td>Ballots Generated</td>
<td>False</td>
</tr>
</tbody>
</table>

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ClearDesign Operation: Creating a Template

With the instructor, perform the procedures for Creating a Template
ClearDesign Operation: Creating Election Media

- Click on ‘Export BDF’ to export the Ballot Definition file that is necessary for ClearCount
- Click on ‘Export ADF’ for the Audio Definition file necessary for ClearAccess
ClearDesign Operation: Creating Election Media

With the instructor, perform the procedures for Creating Election Media
ClearDesign Training

Thank You!