



Clear Ballot

ClearDesign Training

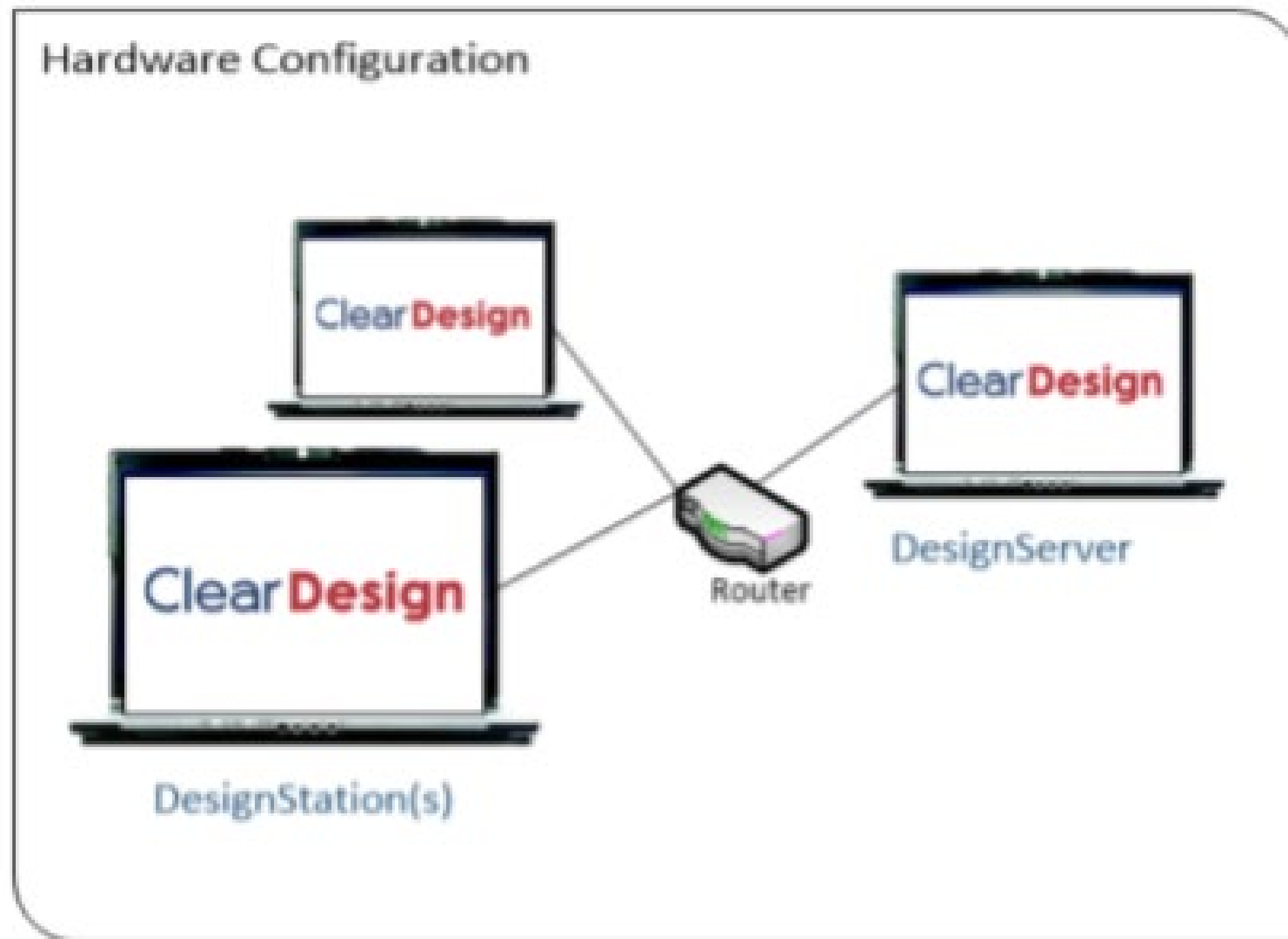
Course Objectives



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

The screenshot displays the ClearDesign web application interface. At the top, there's a header with the ClearDesign logo, a navigation bar with tabs like 'Ballot Sets', 'Ballot Group Styles', 'Ballot Groups', 'Ballot Styles', 'Ballots', 'Card Styles', and 'Cards'. A breadcrumb trail shows the path: Home > Elections > General November 2012 > Ballot Styles. A search bar and action buttons (Copy, PDF, Excel, CSV, Print, Show / hide columns) are present. Below is a table with columns for Sort Seq, Name, Ballot Set, Party, Card Template, Ballot Groups Count, Ballots Count, Card Styles Count, and Contests Count. The table lists three ballot styles. A sidebar on the left contains a 'Random Access Navigation' menu with expand/collapse options. A footer bar indicates 'Showing 1 to 3 of 80 entries'.

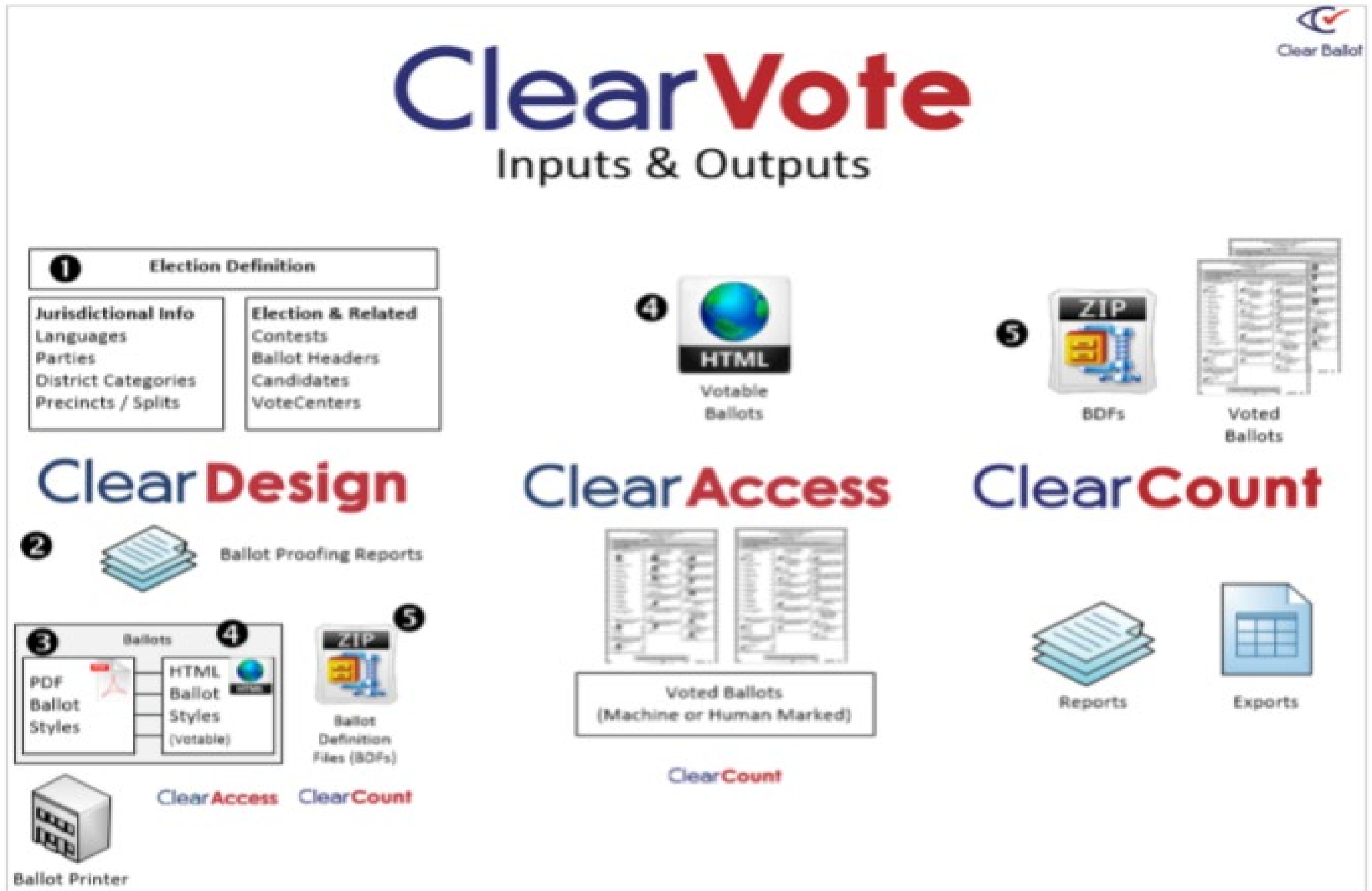
	Sort Seq	Name	Ballot Set	Party	Card Template	Ballot Groups Count	Ballots Count	Card Styles Count	Contests Count
Edit Layout	1	Ballot Style 1	VBM	Non-Partisan	8.5 x 18 - 4 Column	1	1	2	29
Edit Layout	2	Ballot Style 2	VBM	Non-Partisan	8.5 x 18 - 4 Column	1	1	2	29
Edit Layout	3	Ballot Style 3	VBM	Non-Partisan	8.5 x 18 - 4 Column	1	1	2	25

Random Access Navigation
Expand / Collapse

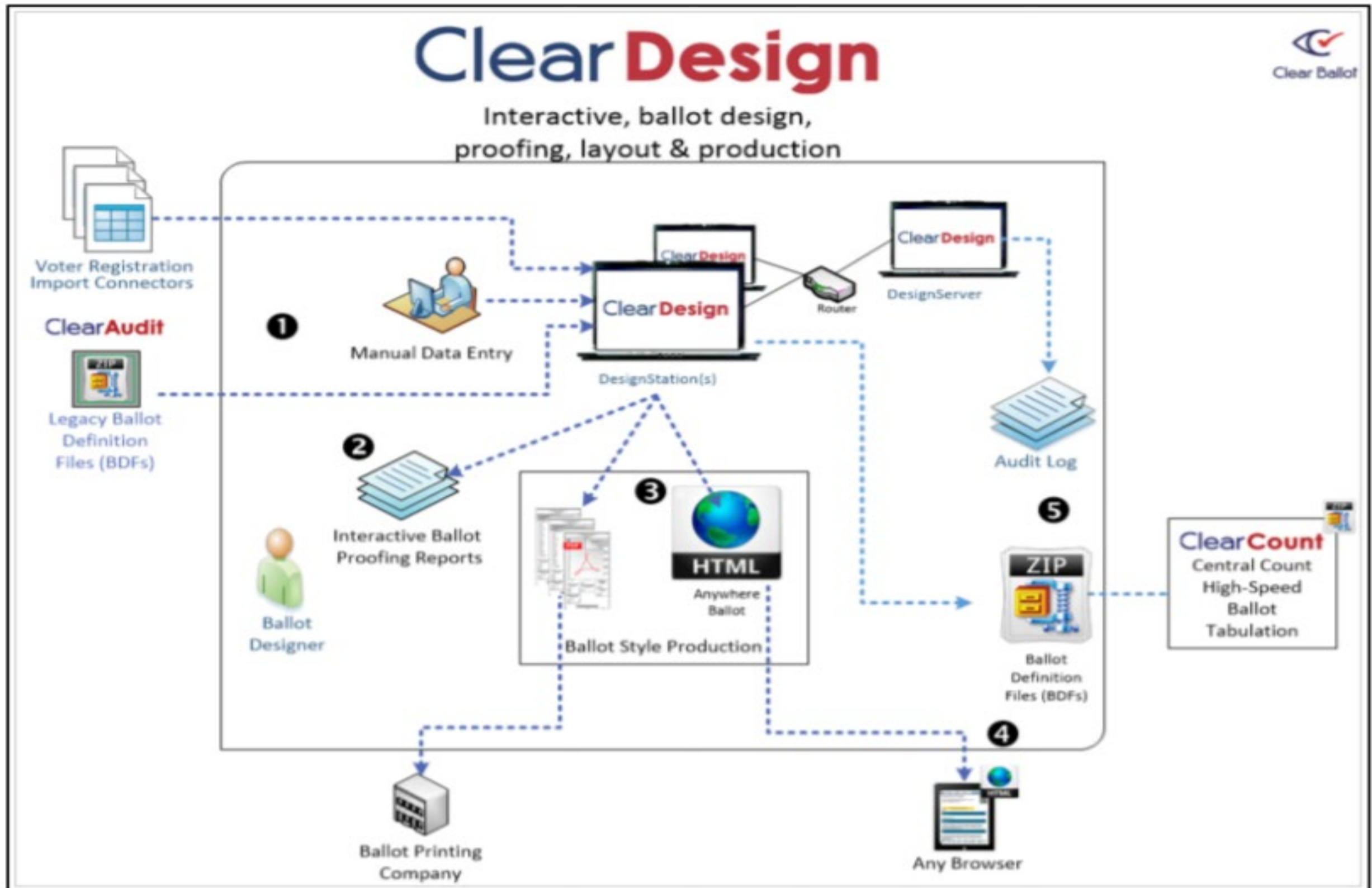
Buttons

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

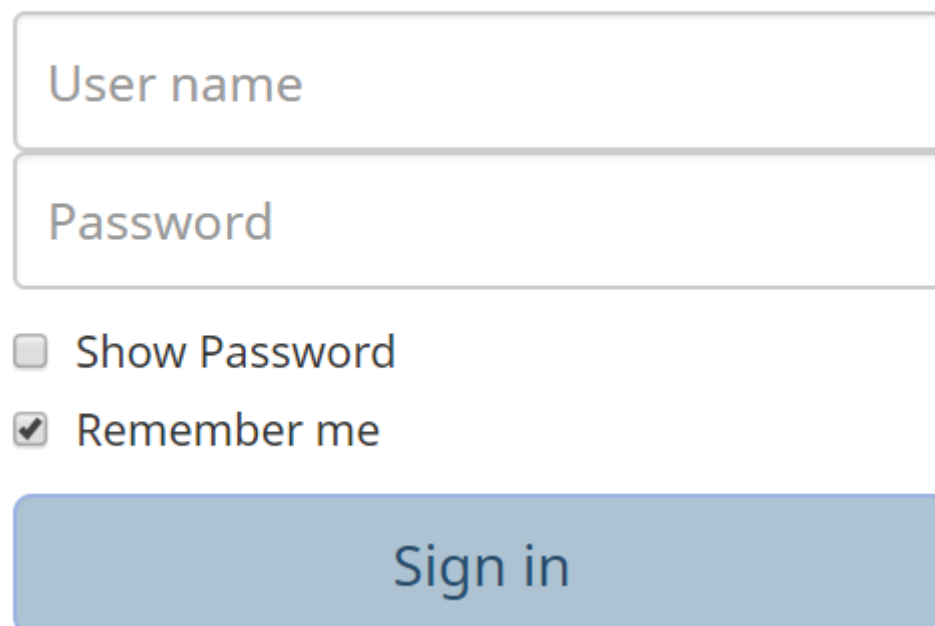
ClearDesign: User Administration



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

The login dialog features a light blue background with a large, faint 'C' logo. It contains two input fields: 'User name' and 'Password'. Below these are two checkboxes: 'Show Password' (unchecked) and 'Remember me' (checked). At the bottom is a blue 'Sign in' button.

User name

Password

☐ Show Password

☒ Remember me

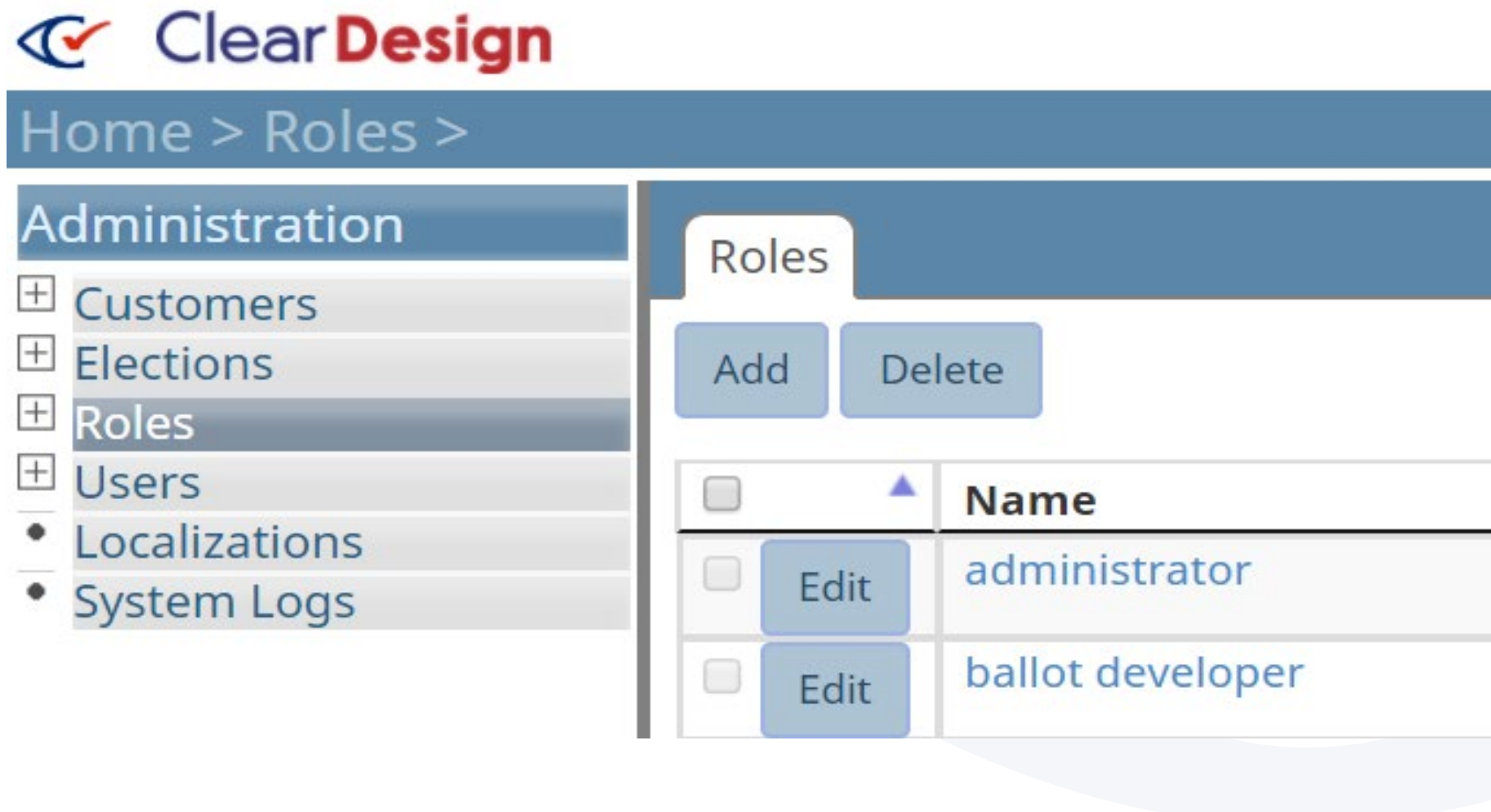
Sign in

- Enter your user name and password
- Click Sign In

ClearDesign: User Administration

Adding a new Role

- From the **Home** page, Click Roles in the Navigation menu
- Click **Add**



The screenshot displays the ClearDesign application interface. At the top left is the ClearDesign logo. Below it is a breadcrumb trail: Home > Roles >. On the left is a navigation menu under the heading 'Administration', listing: Customers, Elections, Roles (highlighted), Users, Localizations, and System Logs. The main content area is titled 'Roles' and contains 'Add' and 'Delete' buttons. Below these buttons is a table with two visible rows of roles.

<input type="checkbox"/>		Name
<input type="checkbox"/>	Edit	administrator
<input type="checkbox"/>	Edit	ballot developer

ClearDesign: User Administration



Adding a new Role

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

Role: Role 100

Basic

Permissions

Name

New Role

Sort Seq

100

Password

Minimum password length

8

Must change password every (days)

45

Number of different types of characters

1

Failed login account lock count

3

Type of characters are [a-z],[A- Z],[0-9],[!@#\$\$%]

Cannot reuse previous password count

4

Failed login lock time (minutes)

5

ClearDesign: User Administration



Adding a new Role

- On the Permissions tab, select the permissions appropriate for the role

<input type="checkbox"/> View	<input type="checkbox"/> Add	<input type="checkbox"/> Edit
<input type="checkbox"/> Audio-View		
<input type="checkbox"/> Ballot-View		<input type="checkbox"/> Ballot-Edit
<input type="checkbox"/> Ballot Group-View		<input type="checkbox"/> Ballot Group-Edit
<input type="checkbox"/> Ballot Group Style-View		<input type="checkbox"/> Ballot Group Style-Edit
<input type="checkbox"/> Ballot Group Split-View		
<input type="checkbox"/> Ballot Set-View	<input type="checkbox"/> Ballot Set-Add	<input type="checkbox"/> Ballot Set-Edit

ClearDesign: User Administration

Adding a new User

- From the **Home** page, click **Users** in the Navigation menu
- Click **Add**



Home > Users >

Administration

- + Customers
- + Elections
- + Roles
- + Users
- Localizations
- System Logs

Users

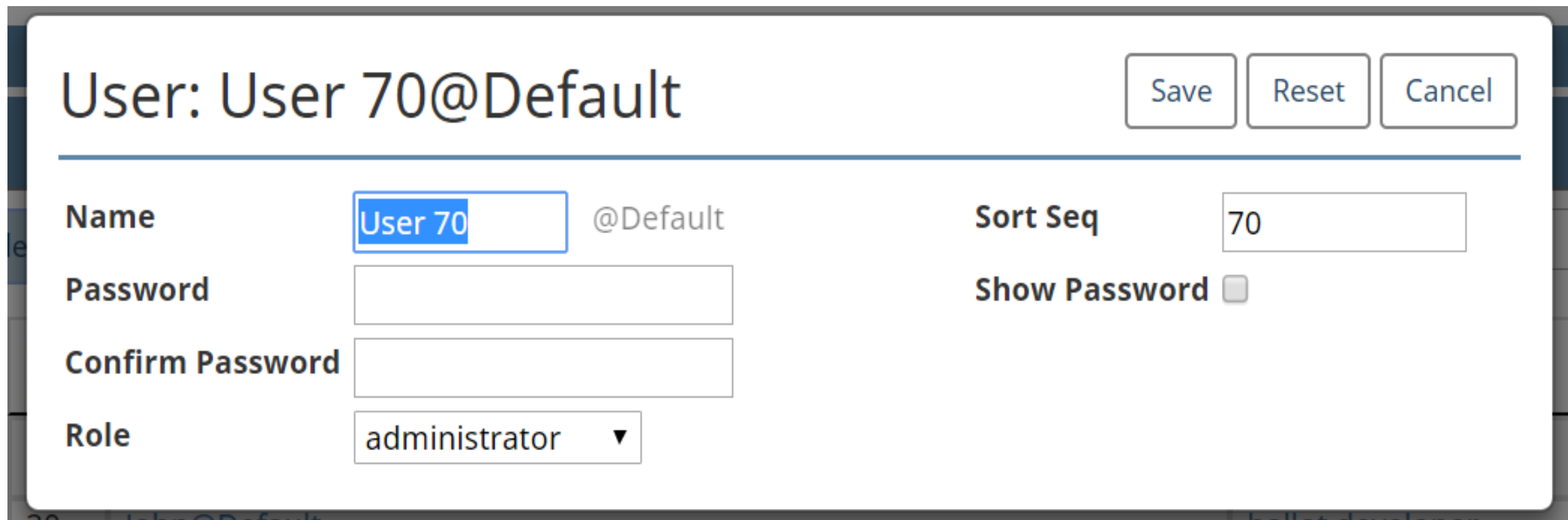
Add

Delete

<input type="checkbox"/>		Sort Seq	Name
<input type="checkbox"/>	Edit	10	admin@Default
<input type="checkbox"/>	Edit	30	John@Default

ClearDesign: User Administration

- Enter a user **Name** and **Password**
- Select the appropriate **Role**



The screenshot shows a web form for user administration. At the top, the text "User: User 70@Default" is displayed. To the right of this text are three buttons: "Save", "Reset", and "Cancel". Below this header, the form is organized into two columns. The left column contains four fields: "Name" with a text input containing "User 70" and a suffix "@Default", "Password" with an empty text input, "Confirm Password" with an empty text input, and "Role" with a dropdown menu showing "administrator". The right column contains two fields: "Sort Seq" with a text input containing "70" and "Show Password" with an unchecked checkbox.

User: User 70@Default

Save Reset Cancel

Name @Default

Sort Seq

Password

Show Password ☐

Confirm Password

Role

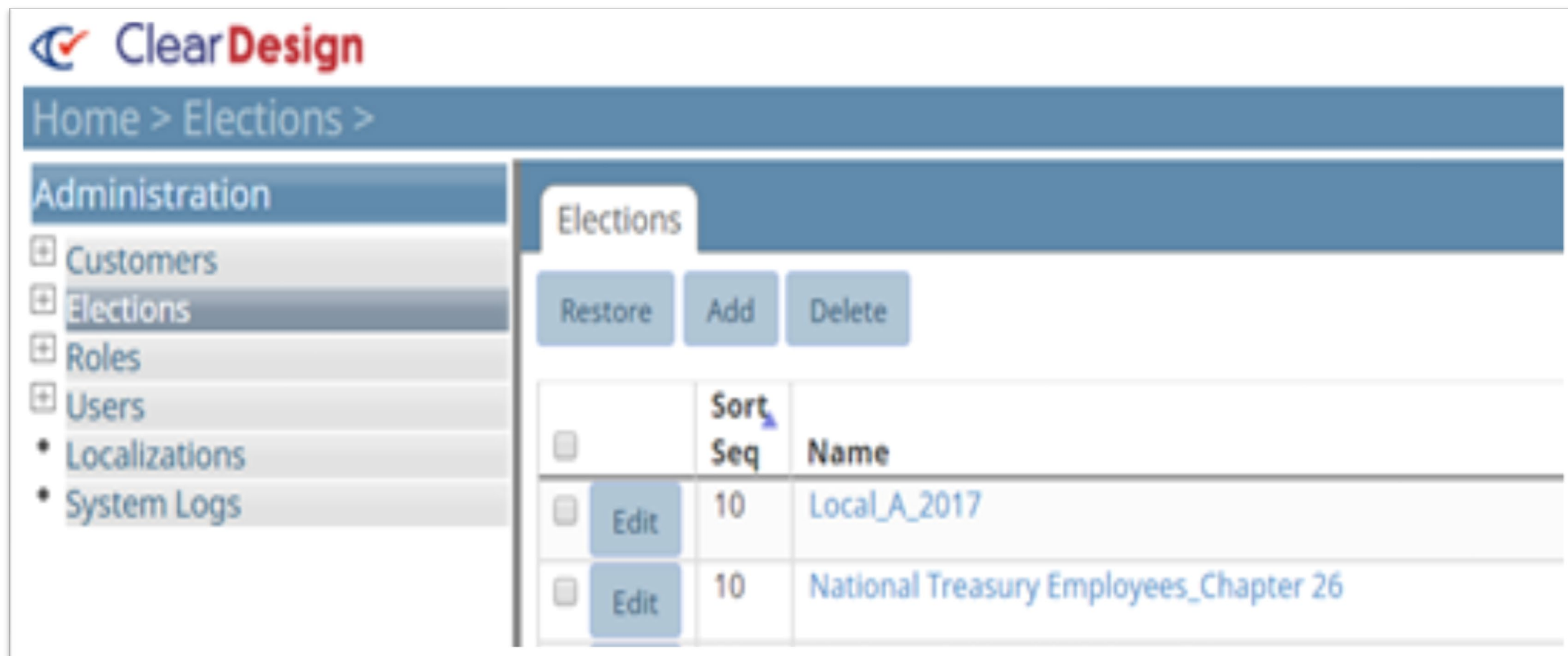
ClearDesign: Election Creation



**With the instructor,
perform the procedures to add an new user**

ClearDesign: Election Creation

- Click 'Add' to begin creating a new election



The screenshot displays the ClearDesign web application interface. The top navigation bar shows the breadcrumb path "Home > Elections >". On the left, a sidebar menu under the "Administration" header lists "Customers", "Elections", "Roles", "Users", "Localizations", and "System Logs". The "Elections" menu item is selected. The main content area features a tab labeled "Elections" and three buttons: "Restore", "Add", and "Delete". Below these buttons is a table with the following structure:

<input type="checkbox"/>		Sort Seq	Name
<input type="checkbox"/>	Edit	10	Local_A_2017
<input type="checkbox"/>	Edit	10	National Treasury Employees_Chapter 26

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'

Election: My new election Save Reset Cancel

Name	<input type="text" value="My new election"/>	Sort Seq	<input type="text" value="1210"/>
Short Name	<input type="text" value="My new election"/>	Abbreviation	<input type="text" value="electi"/>
Import ID	<input type="text"/>	Export ID	<input type="text"/>
Election Date	<input type="text" value="mm/dd/yyyy"/>		
Jurisdiction Name	<input type="text" value="My County"/>		
Officials Title	<input type="text"/>	Officials Name	<input type="text"/>
Import File	<input type="button" value="Choose File"/> No file chosen		

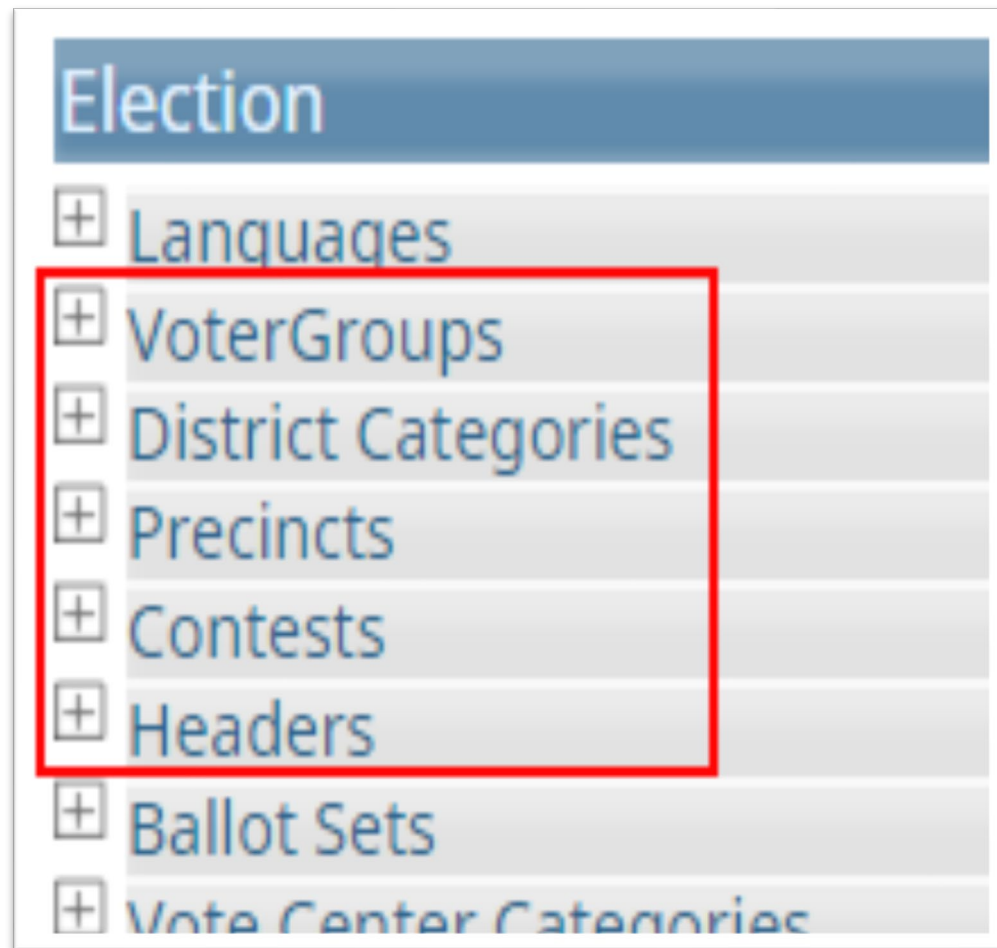
ClearDesign: Election Creation



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

<input type="checkbox"/>	Edit	1040	General Election Template
<input type="checkbox"/>	Edit	1050	Clear County Template
<input type="checkbox"/>	Edit	1060	Clear County Election

ClearDesign: Election Creation

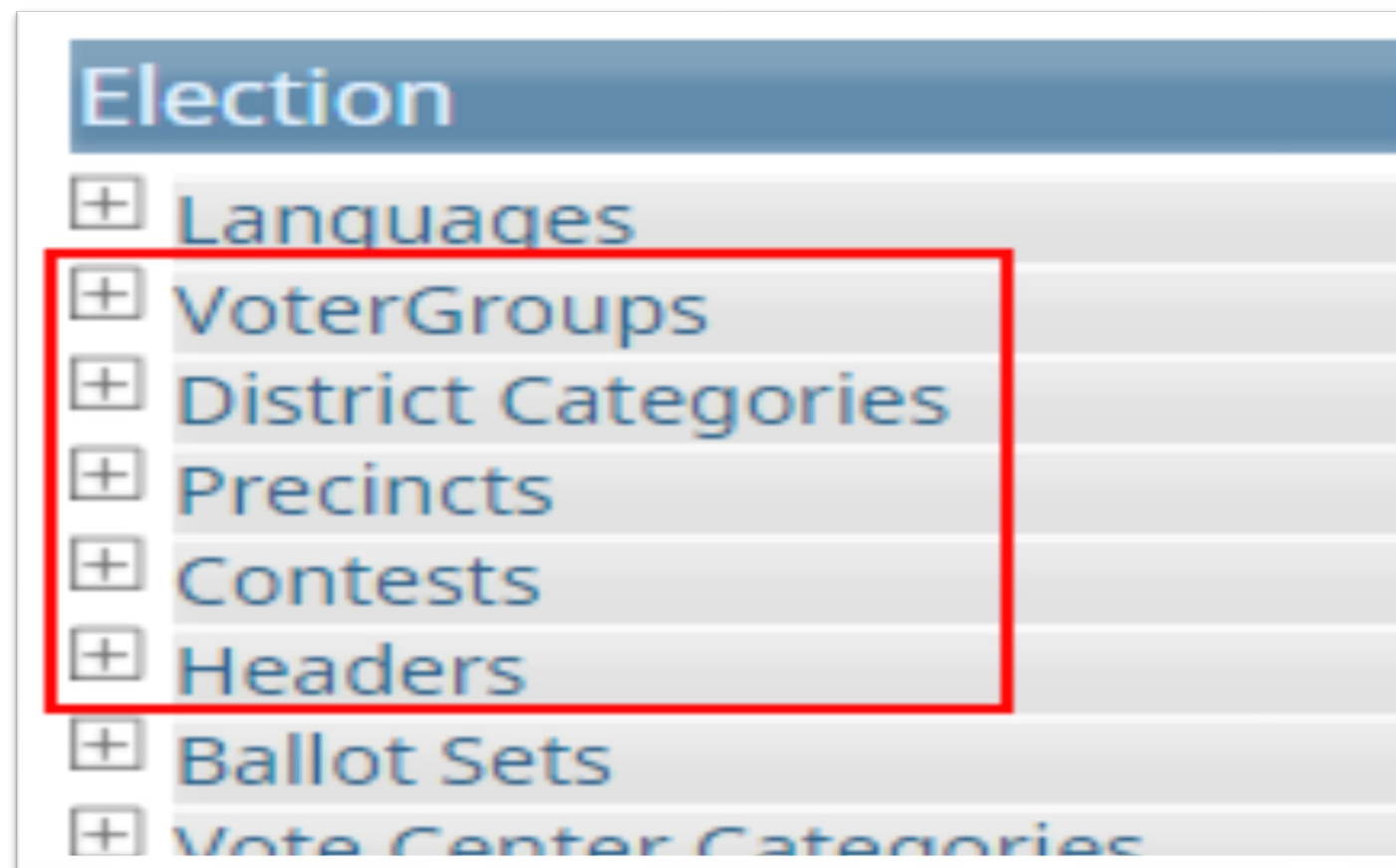


- Click on the items in the left menu to begin entering data from the X-Chart:
 - Skip 'Languages' for now
 - Click 'Voter Groups' to enter political parties necessary for your election
- The X-Chart includes the American and National parties, but you may add others if you wish

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'

Clear County Election > District Categories > CONGRESSIONAL

Info Districts Splits Logs

Edit Add District

Basic

Name	CONGRESSIONAL	Sort Seq	40
Short Name	CONGRESSIONAL	Abbreviation	CONGRE
Import ID	CONGRESSIONAL	Export ID	
Last Edit By	Mark@Default	Last Edit Time	2017-08-29 11:01:55

ClearDesign: Election Creation



- Select 'Precincts' from 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

Precinct: Precinct 53

Basic Districts

Name Sort Seq

Short Name Abbreviation

Import ID Export ID

Languages ☒ English ☒ Spanish

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

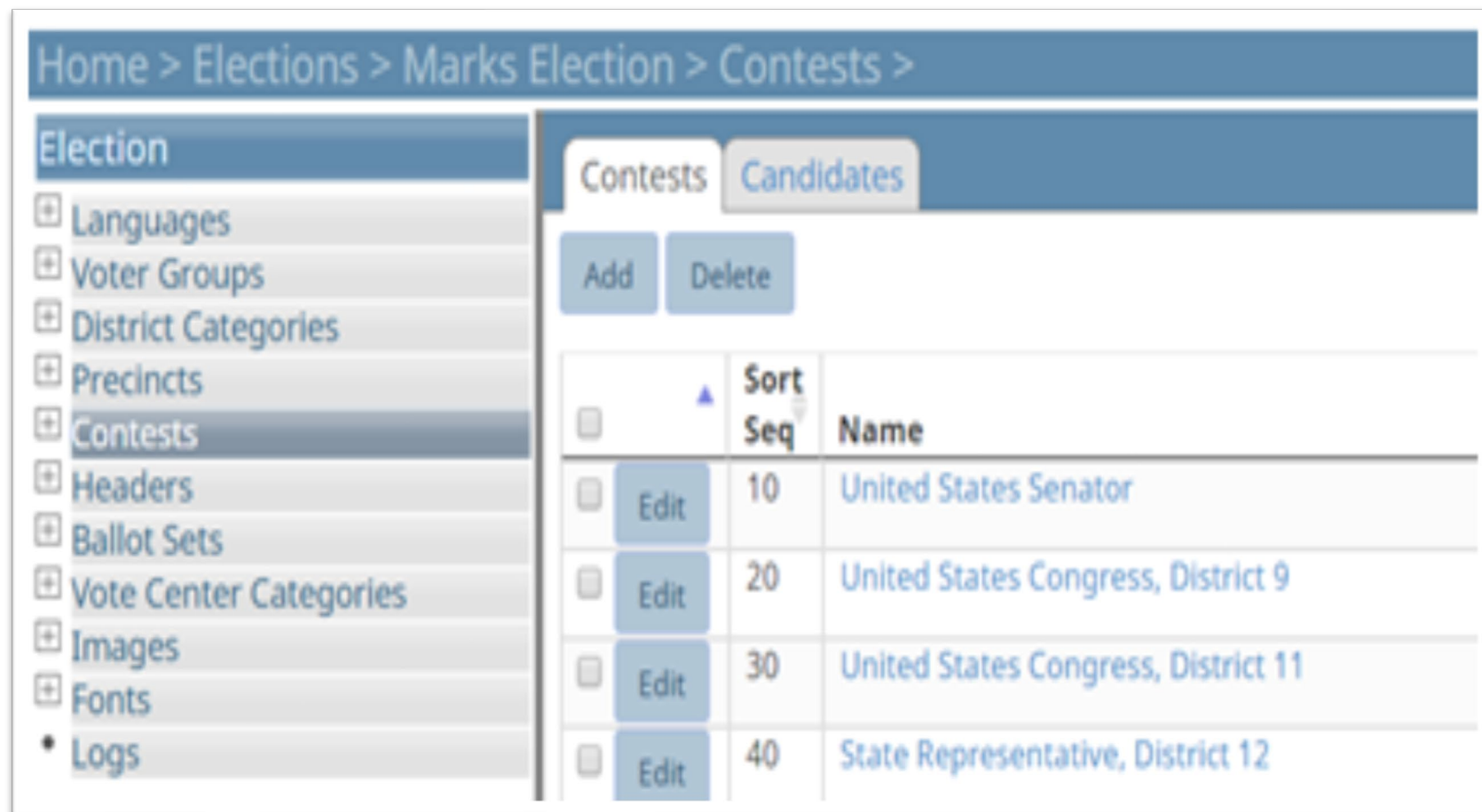
Precinct: Precinct 53

Basic Districts

Jurisdiction Wide	STATEWIDE PARTISAN	COUNTYWIDE	CONGRESSIONAL	STATE REPRESENTATIVE	STATE SENATOR	CITY	SCHOOL
<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None
<input type="radio"/> Jurisdiction Wide	<input type="radio"/> Statewide Partisan	<input type="radio"/> Clear County	<input type="radio"/> US Congressional District 2	<input type="radio"/> House District 05	<input type="radio"/> Senate District 03	<input type="radio"/> City of Clear Falls	<input type="radio"/> Clear Falls City Schools
				<input type="radio"/> House District 55	<input type="radio"/> Senate District 28	<input type="radio"/> Town of Bonanza	<input type="radio"/> Clear County Schools
				<input type="radio"/> House District 56		<input type="radio"/> City of Malin	
						<input type="radio"/> City of Merrill	
						<input type="radio"/> City of Chiloquin	

ClearDesign: Election Creation

- Click on 'Contests' in the left menu
- Click on 'Add'



The screenshot shows the 'ClearDesign' interface for election creation. The breadcrumb trail at the top reads 'Home > Elections > Marks Election > Contests >'. On the left, a sidebar menu lists various election-related items: Languages, Voter Groups, District Categories, Precincts, Contests (highlighted), Headers, Ballot Sets, Vote Center Categories, Images, Fonts, and Logs. The main content area has two tabs: 'Contests' (active) and 'Candidates'. Below the tabs are 'Add' and 'Delete' buttons. A table displays the list of contests with columns for a checkbox, 'Sort Seq', and 'Name'.

<input type="checkbox"/>	Sort Seq	Name
<input type="checkbox"/> Edit	10	United States Senator
<input type="checkbox"/> Edit	20	United States Congress, District 9
<input type="checkbox"/> Edit	30	United States Congress, District 11
<input type="checkbox"/> Edit	40	State Representative, District 12

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



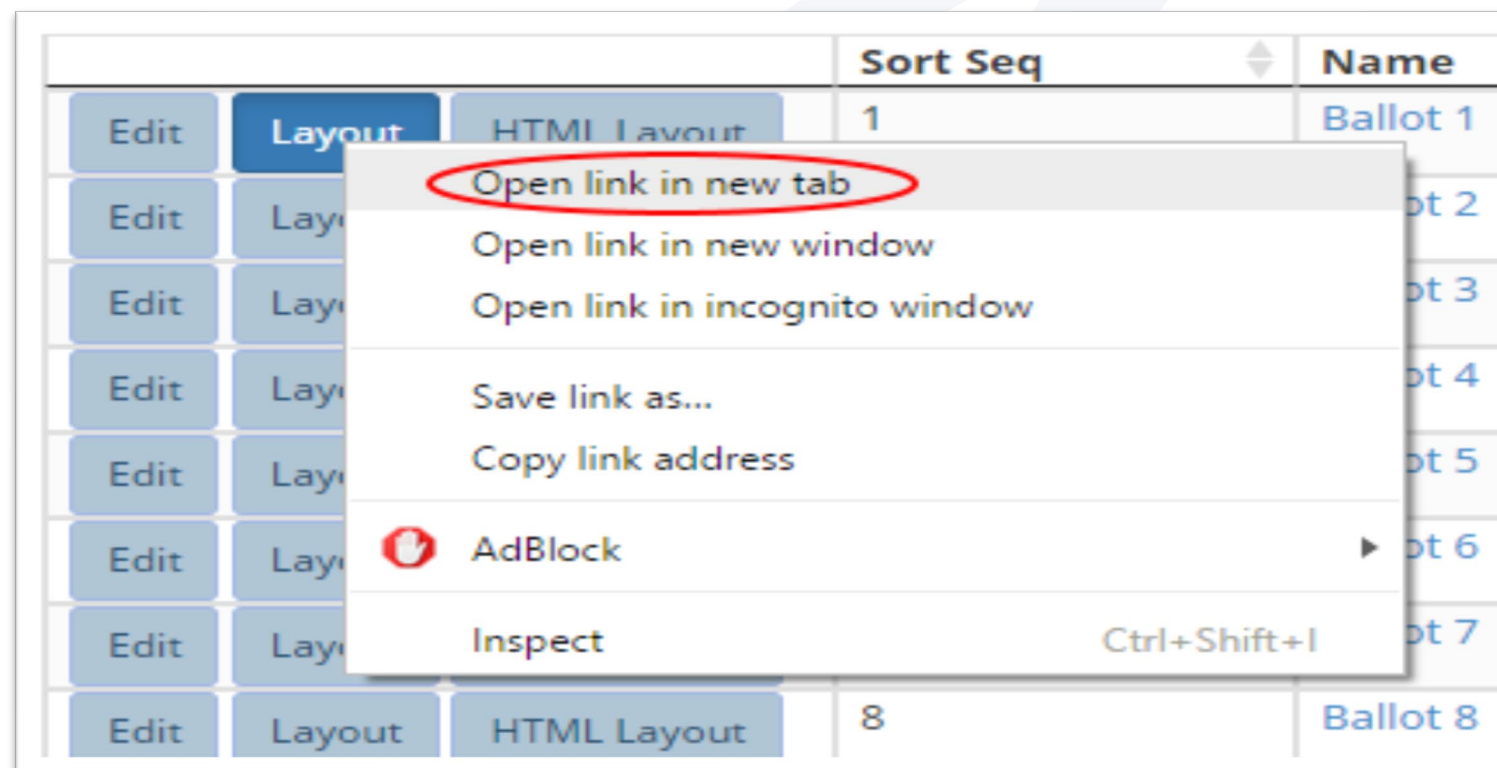
- Click on 'Ballot Sets' in the left-hand menu
- Click 'Generate' from the Ballot Sets tab
 - This creates the relationships between contests, districts, and splits, to automatically create the necessary ballot styles need for the election



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'

InfoLanguagesVoter GroupsDistrict CategoriesPrecinctsContestsHeadersBallot Sets

Import DataExport BDFExport ADFBackupReportsEdit

Basic

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

ClearDesign Operation: Backing up an election



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

Backup Election

Backup files use a validation code to ensure the contents have not changed

Validation Code

Confirm Validation Code

☒ **Show Validation Code**

- 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'



Home > Elections >

Administration

- + Customers
- + Elections
- + Roles
- + Users
- Localizations
- System Logs

Elections

Restore

Add

Delete

<input type="checkbox"/>	Sort Seq	Name
<input type="checkbox"/> Edit	1760	May 15 2018 Primary Election - Test 2
<input type="checkbox"/> Edit	1740	May 15 2018 Primary Election - Yam Test 2
<input type="checkbox"/> Edit	1730	Primary Election 2018

ClearDesign Operation: Restoring an Election



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

The screenshot shows a dialog box titled "Restore Election". Inside the dialog, there is a section labeled "Select the file to restore" with a "Choose File" button and the text "No file chosen". Below this, there is a label "Enter the validation code for file" followed by an empty text input field. Under the input field is a checkbox labeled "Show Validation Code". At the bottom right of the dialog are two buttons: "OK" and "Close".

- 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

Info	Languages	Voter Groups	District Categories	Precincts	Contests	Headers	Ballot Sets
Import Data	Export BDF	Export ADF	Backup	Reports	Edit		

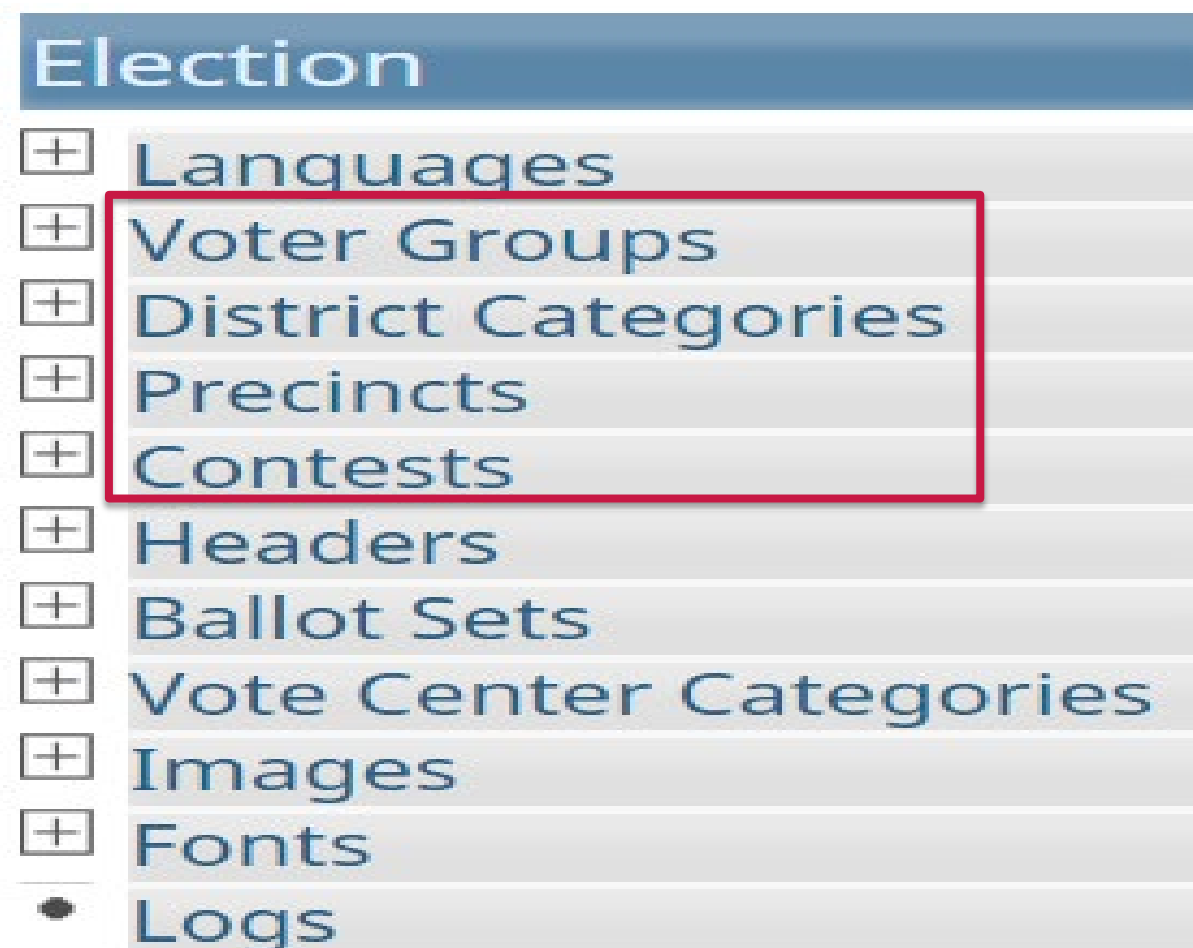
Basic

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

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

InfoLanguagesVoter GroupsDistrict CategoriesPrecinctsContestsHeadersBallot Sets

Import DataExport BDFExport ADFBackupReportsEdit

Basic

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

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

InfoLanguagesVoter GroupsDistrict CategoriesPrecinctsContestsHeadersBallot Sets

Import DataExport BDFExport ADFBackupReportsEdit

Basic

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

ClearDesign Operation: Creating Election Media



**With the instructor,
perform the procedures for
Creating Election Media**



Clear Ballot

ClearDesign Training

Q&A



Clear Ballot

ClearDesign Training

Thank You!