Clear Ballot

ClearCount Training

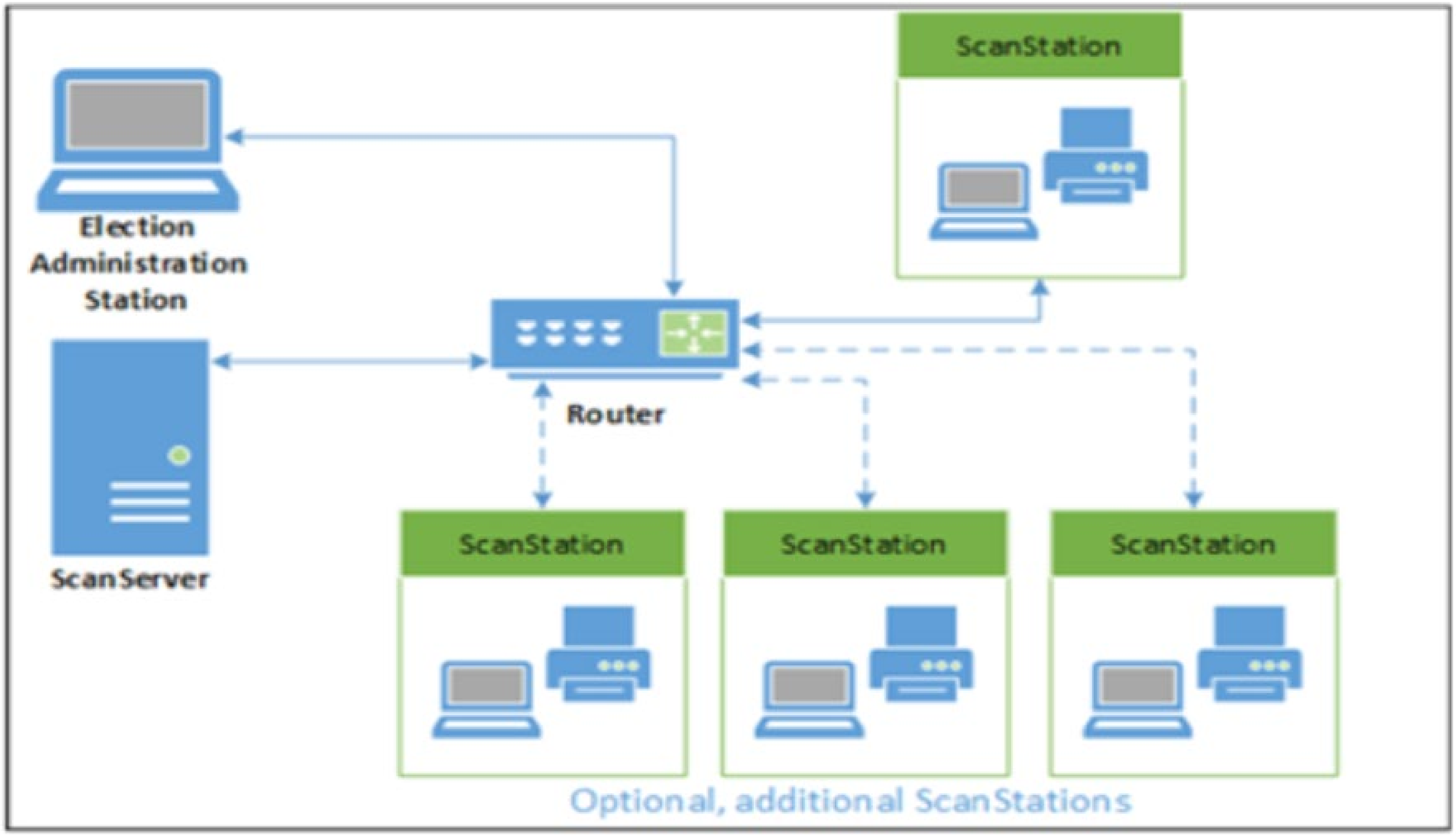
Fujitsu Scanners

Course Objectives

This training will provide you with:

- An overview of ClearCount
- Hands-on Exercises
- An understanding of the general operations and maintenance of ClearCount
- A summary of the ClearCount Administrative functions
- Knowledge of ClearCount’s reporting functions

ClearCount Overview



ClearCount Overview

Election Administration Station – Computer used to set up an election, to review and produce reports, and to facilitate adjudication

ScanServer – Computer that is the hub of the system. It runs the ClearCount software, and hosts the election database

Router or Switch – Device that connects computers in the system

ScanStation(s) – Each station has a computer and a scanner

- The Computer runs the ClearCount tabulation program that analyzes and transfers data to the ScanServer
- The Scanner optically scans ballots to create 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

ClearCount: Security

Security is ensured through the following mechanisms:

- Access control
- Use of a closed network
- Security-minded administrative practices
- Recommended system hardening procedures
- Audit logs
- ScanStations are authenticated
- Restricted access to the BIOS
- Extraneous programs removed

ClearCount: User Administration

Access level	Description
none	No access to the system allowed. This setting may be used to toggle a user's access without deleting the user.
read	User can view election reports, but he or she cannot modify anything.
append	User can add new database ballot records or new ballot images by scanning. The ScanStation user has this level of access.
modify	User can modify existing contents of the election through tools that allow remaking or correcting.
dbadmin	User can add or delete election databases as well as change a database's status. The dbadmin can give him- or herself modify access to any new database he or she creates.
useradmin	User account management (the ability to add, modify, and delete users).

ClearCount: User Administration

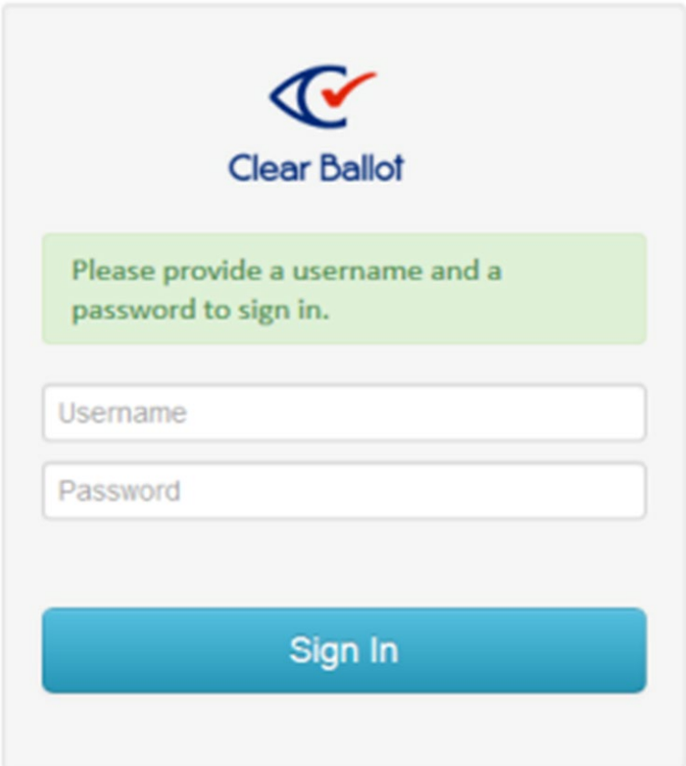
User passwords

- Maintain privacy
- Keep the password a secret
- Longer passwords
  - more secure (14 characters recommended)
  - easy to remember
- Mix of uppers, lowers, letters, numbers & symbols
- Keep system current
- An Administrator can reset a user's password in the event that it has been lost or compromised
- Forgotten passwords cannot be recovered

ClearCount: User Administration

Login

- On the Election Administration Station, open a browser
- Enter the ScanServer name or IP address in the URL field
- The Clear Ballot login dialog appears

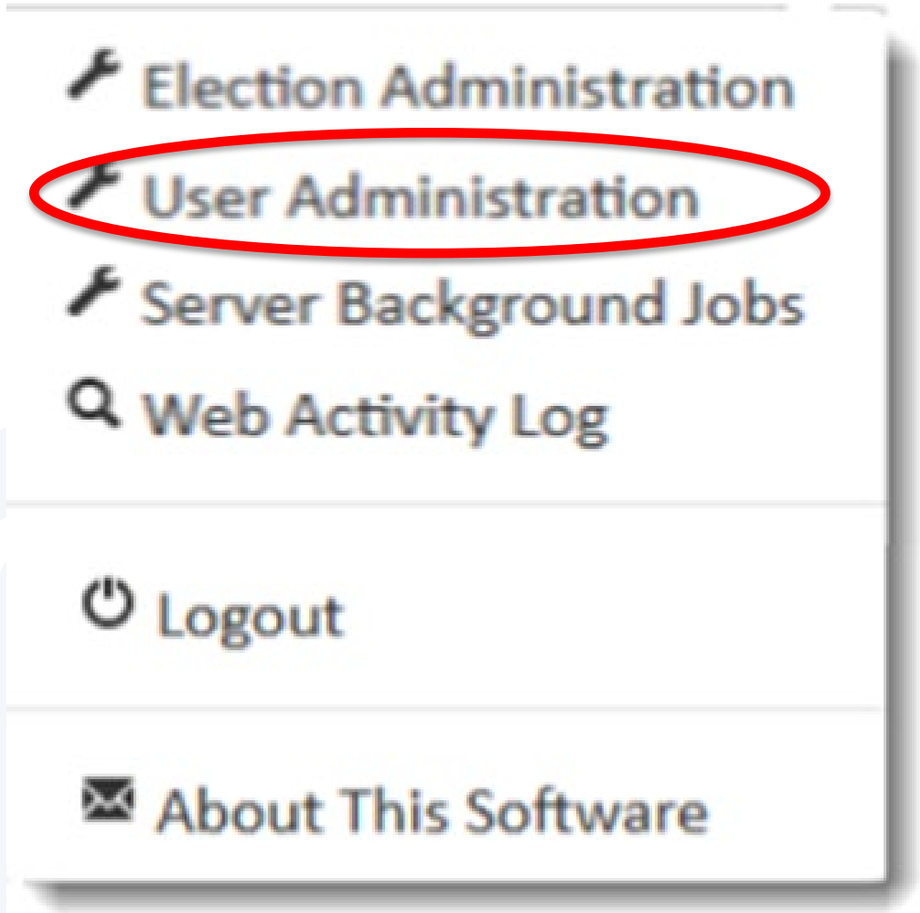


- Enter your user name and password
- Click Sign In

ClearCount: User Administration

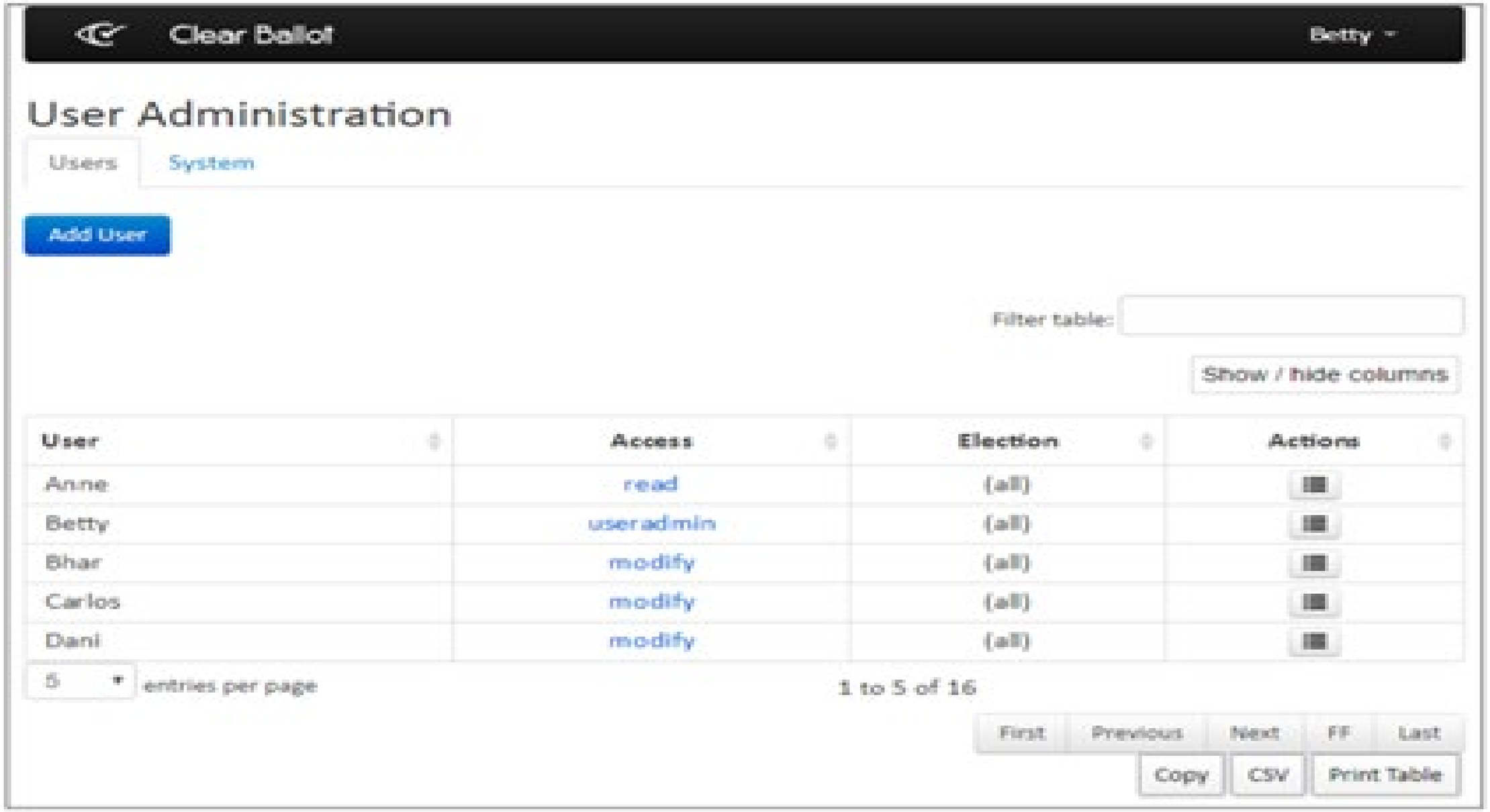
Adding a new User

- From the **Election Index** page, click the down arrow next to the user name
- Click **User Administration**



ClearCount: User Administration

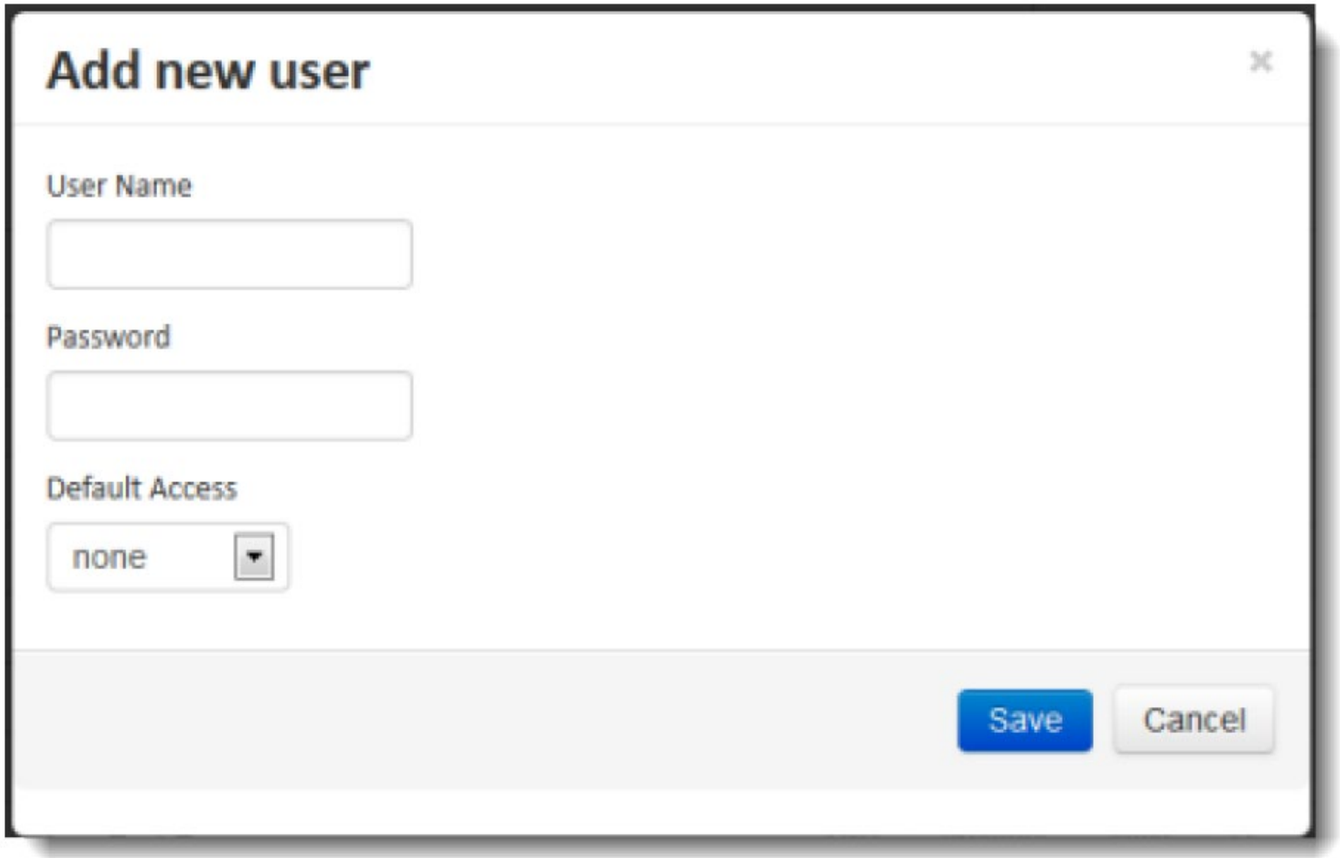
Click **Add User**



ClearCount: User Administration

Adding Users

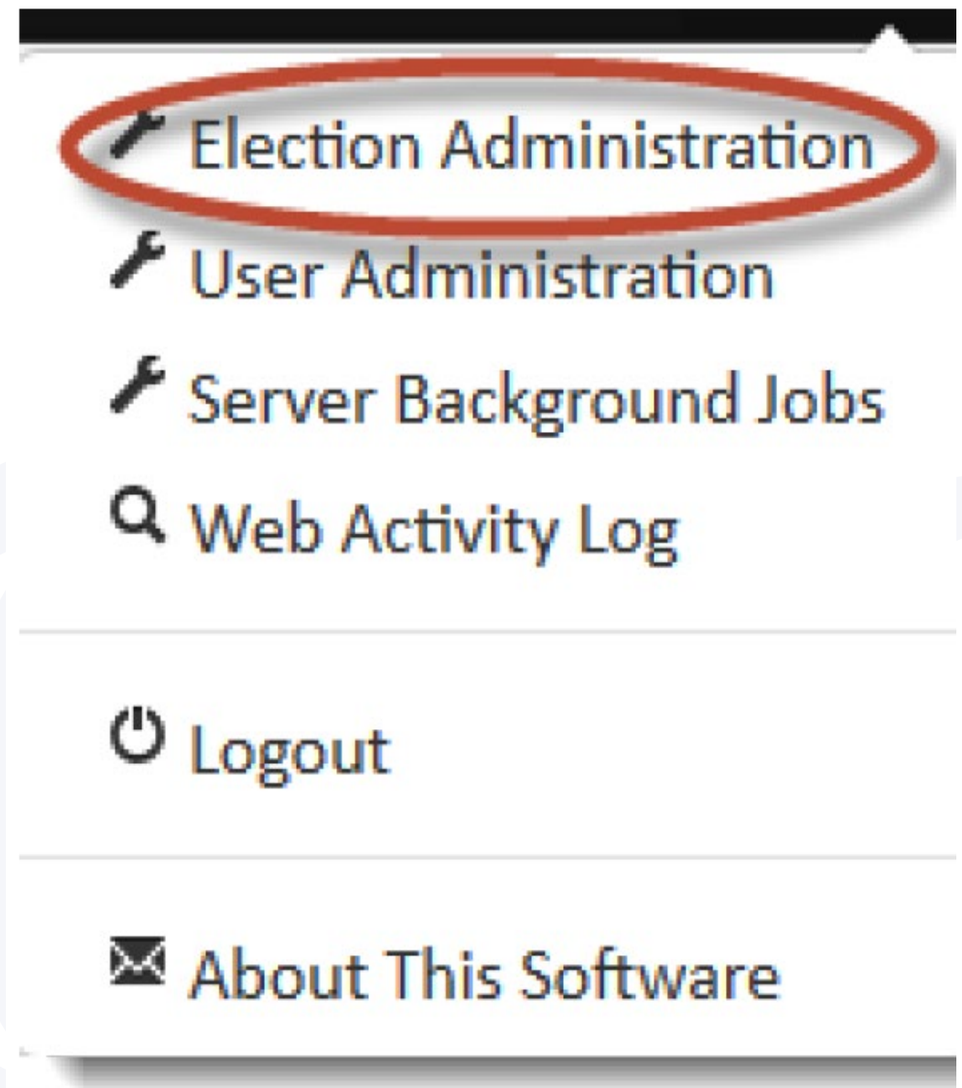
- Enter User Name
- Enter Password
- Select Access level



ClearCount: Election Administration

Creating an election

- From the **Election Index** page, click the down arrow next to the user name
- Click **Election Administration**



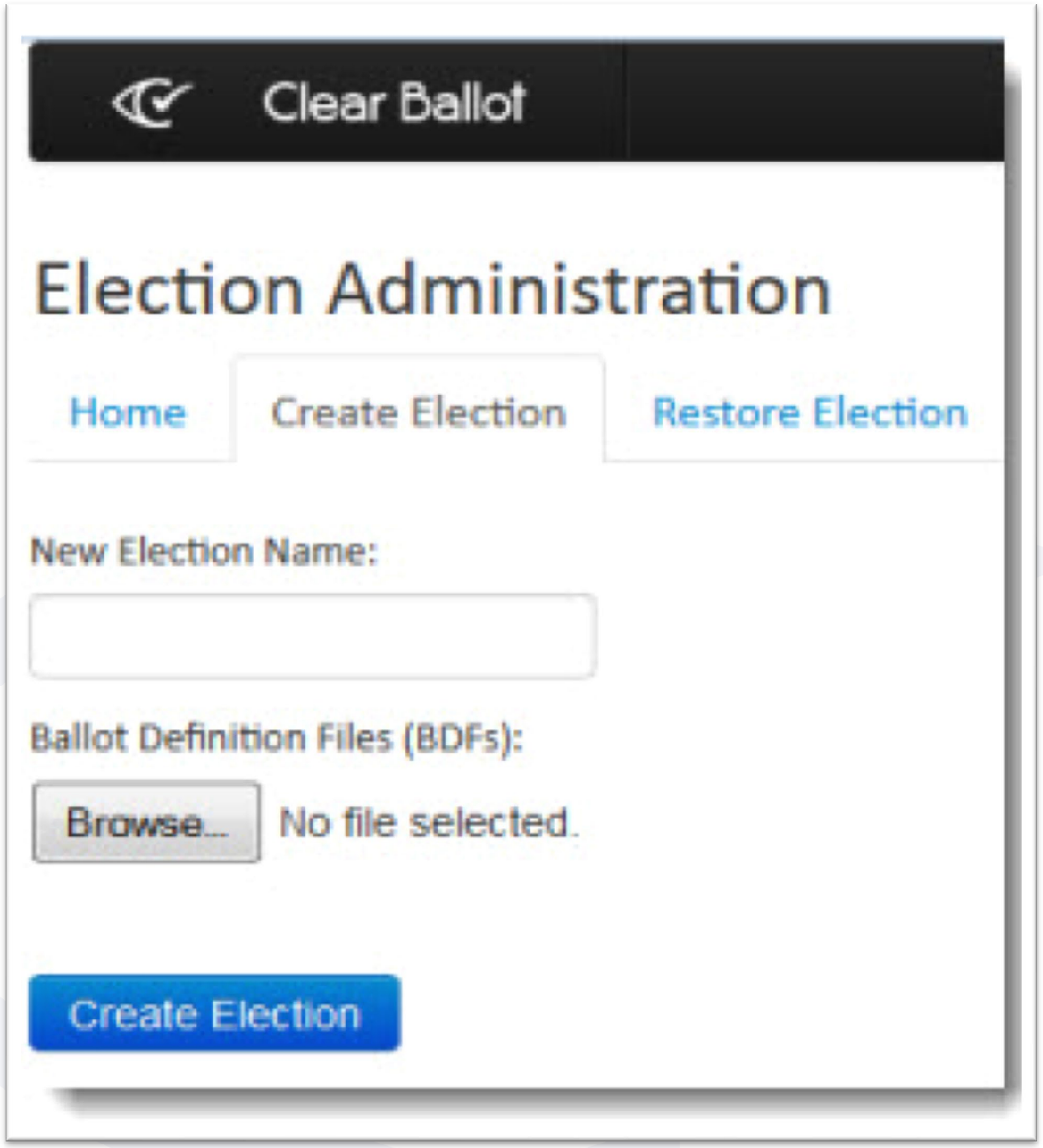
ClearCount: Election Administration

Recommended naming rules and conventions

- StateCode_Jurisdiction_Election year and type
- Maximum of 64 characters
- Can contain
  - Lower or uppercase letters,
  - Digits (0-9) (Can begin with a digit, but cannot be solely digits)
  - Underscores (_)
  - Dollar signs ($)
- Cannot contain: Any character not allowed in a Windows file name
- Cannot end in a space

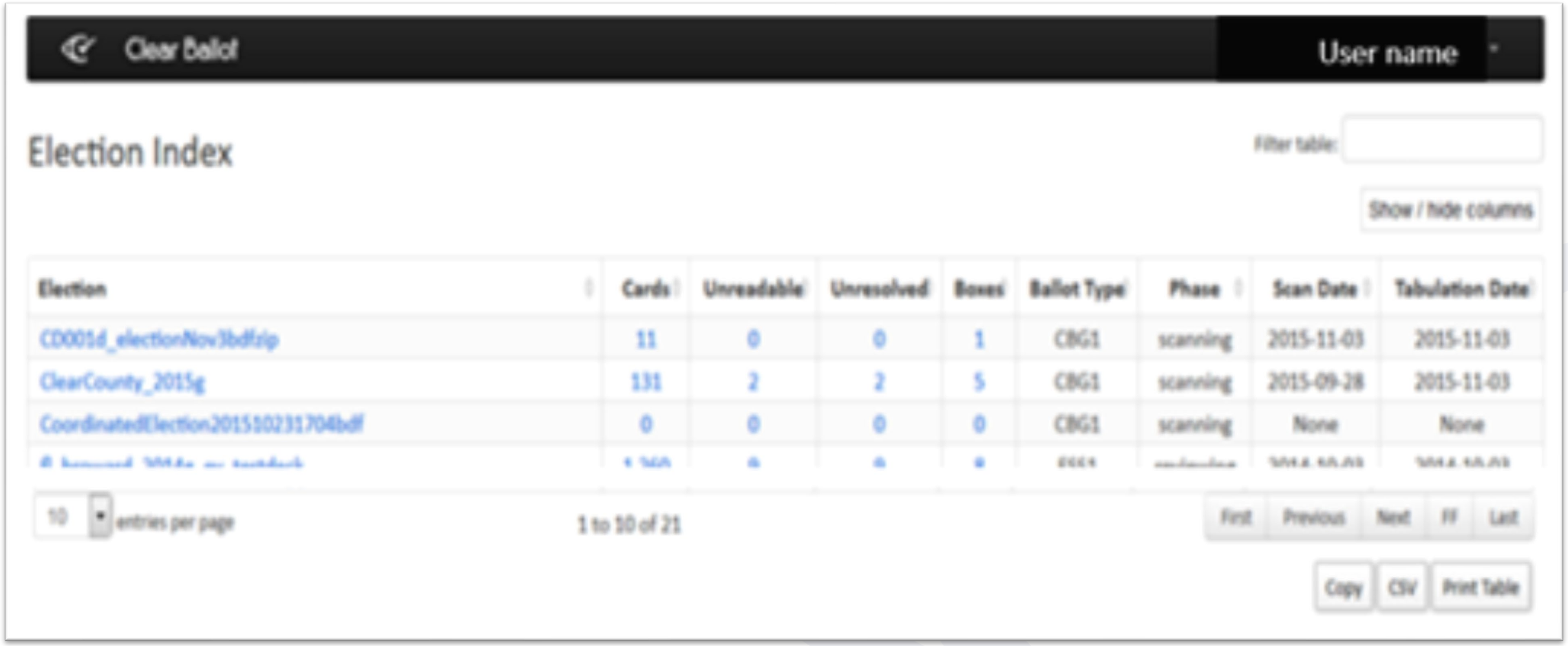
ClearCount: Election Administration

- On the **Create Election** tab, enter the new election name
- Browse to and select the BDF for this election
- Click **Create Election**



ClearCount: Election Administration

When an election is created, it is automatically made the active election and it is added to the Election index



ClearCount: Election Administration

Clicking on the Election Name will open the Dashboard

Clear Ballot | Reports for Clear_County_2016g | Betty

Clear County General Election, Nov 08, 2016

Dashboard

Election Data

Election Phase	reviewing
Ballot type	CBG1
Approx ballot image dimensions	8.5" x 17.0"
# Card styles	218
# Contests	98
# Choices	258
# Parties	65
# Counter groups	6
# Precincts	2517
# Precincts and card styles	5248

Ballot Scanning Operations

Scan date	2017-01-12
Tabulation date	2017-01-12
Tabulator software version	Version 1.3.2 2016-10-12 16:04:57
# Scanners	4
# Boxes scanned	4
# Precincts scanned	1 out of 2517
# Cards automatically adjudicated	198
# Pages judged to be non-ballots	4
# Unreadable cards (8.18% rate)	18
# Pages scanned (ballots and non-ballots)	220
# Cards that are fully blank	17

Visual Resolution of Unreadable Cards

Unreadable card images needing resolution	18
Unreadable cards resolved & adjudicated	0
Unvotable unreadable cards (could be resolved by rescanning 0 boxes):	
Occluded or incomplete unreadable images	0
Scanned unreadable images with multiple overlapping cards	0
Unreadable resolved as a non-ballot	0
Unreadable cards	18

Card Reconciliation

Cards automatically adjudicated		198
Adjustments to card count for Unreadables & Modifications		
Unreadable cards	+18	
Cards resolved as a non-ballot	0	
Cards (originally non-ballots) resolved as a ballot	0	
Estimated additional cards in multiple overlapping cards	0	
Adjustment to card count from visual resolution		+18
Final Total Card Count		**216**

ClearCount: Election Administration

Changing election phase

- In the **Election Administration** page, locate the election
- In the **Access** column click the current phase
- Click the **Phase** dropdown list, select scanning, reviewing, or closed from the list
- Click S**ave**

ClearCount: Election Administration

Changing election phase

Phase	Description
Scanning	Cards can still be scanned or modified through adjudication by users whose access level is modify or above.
Reviewing	Cards can no longer be scanned, but adjudication by users whose access level is modify or above is still allowed.
Closed	The election is locked against additions or modifications.

ClearCount: Election Administration

Changing the active election

- From the Election Administration page, locate the election you want to activate
- In the **Active** column, click the gray arrowhead for the identified election
- The arrowhead you clicked changes to the **Active** indicator
- Only one election can be active at a time and newly scanned ballots are considered to be part of the active election

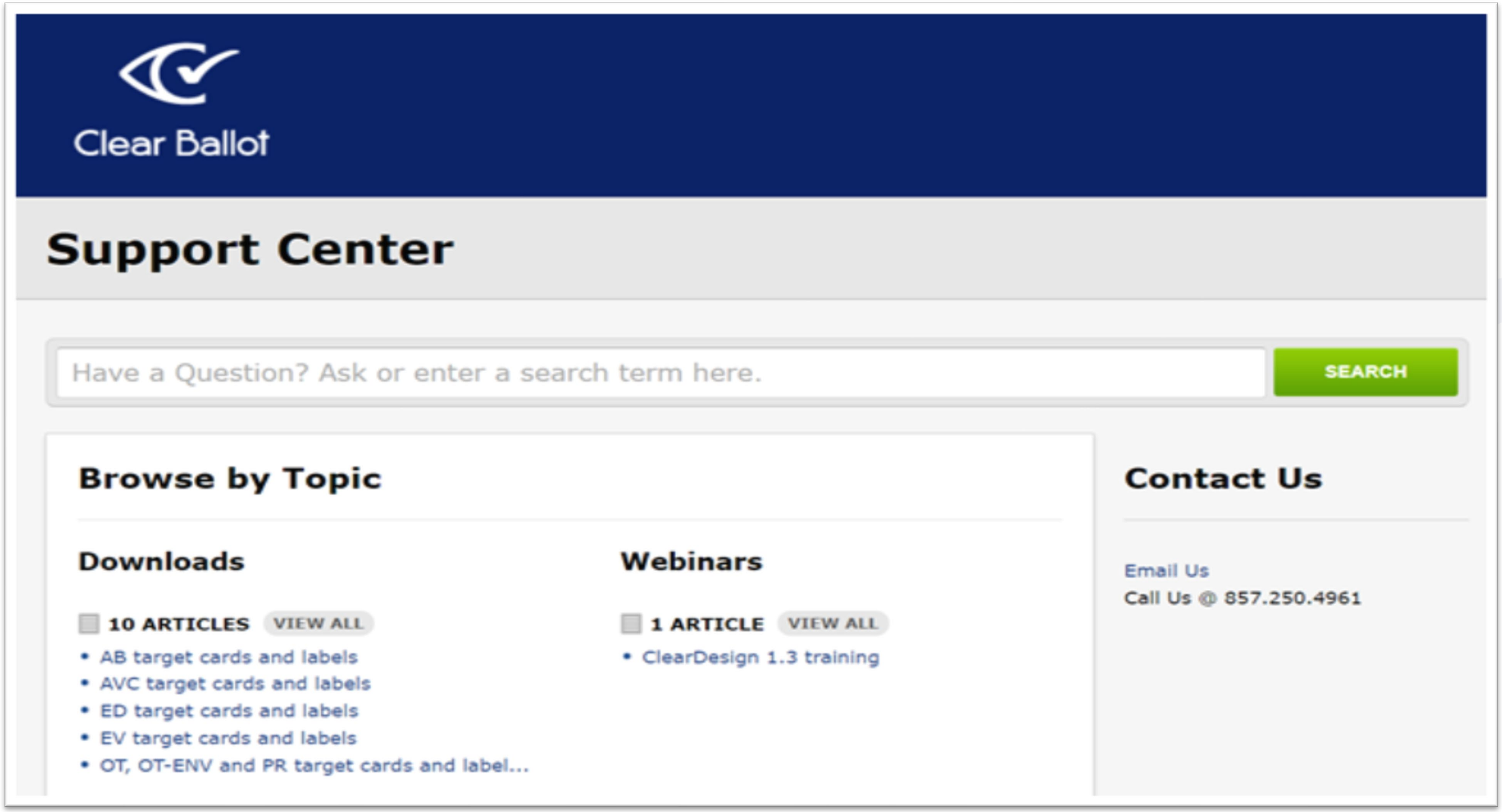
ClearCount Operation: Preparing Ballots

Organize ballots prior to scanning

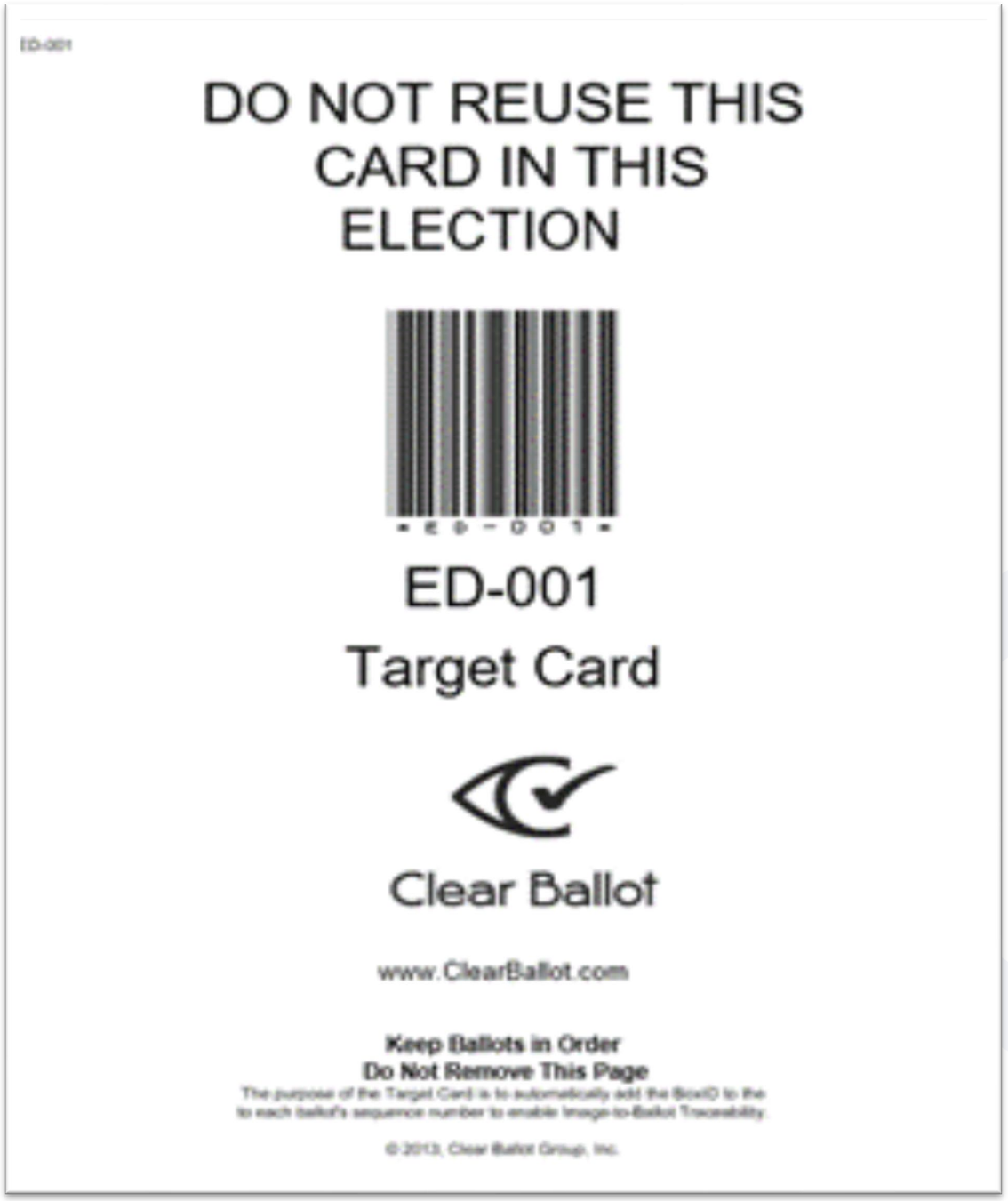
- Sort Ballot Boxes by Voter Group
  - Vote by Mail (VBM)
  - Absentees (AB)
  - Early Voting (EV)
  - Election Day (ED)
  - Provisional (PR)
  - Other, if applicable
- Scan ALL ballots from ONE voter group at a time before moving to the next group

ClearCount Operation: Target cards

Target cards and labels are available on the Clear Ballot website: https://www.clearballot.com/support



ClearCount Operation: Target Cards and Labels



ClearCount Operation: Target Cards and Labels

- Print Target Cards and Labels by Voter Group (AB, EV, ED, or OT)
- Place label on the box containing the stack of ballot cards to be scanned
- Place Target Card on top off the stack of ballots in the box

ClearCount Operation: Target Cards and Labels

Ballot Naming

- The first side of the Target Card is always named by the value of its barcode and Ballot Sequence number, 10001; the second side is 10002

- Ballots are named with an odd Ballot Sequence number for the first side and an even Ballot Sequence number for the second side

ClearCount Operation: Target Cards and Labels

Target Card and Ballots	Name
Front of 4th AB Target Card	AB-004+10001.jpg
Back of 4th AB Target Card	AB-004+10002.jpg
First side of 1st AB Ballot	AB-004+10003.jpg
Second side of 1st AB Ballot	AB-004+10004.jpg
Fist side of 2nd AB Ballot	AB-004+10005.jpg
Second side of 2nd AB Ballot	AB-004+10006.jpg

ClearCount Operation:

**With the instructor,
perform the procedures in the**

***ClearCount System Users
Quick Guide (Fujitsu)***

ClearCount Operation: Troubleshooting

Ballots become out of order or operator terminated a box before all ballots were scanned

- Run the DeleteBox utility, and then re-initiate the standard procedures for scanning a box

Scanner reports a multi-feed or paper jam

- Remove the ballots from the scanner and re-insert them into the input tray to be re-scanned
- If ballots are crumpled, folded, or torn, attempt to smooth and repair them prior to scanning
- If a significant number of unexpected multi-feeds occur, check the sensors within the scanner, occluded sensors can cause multi-feeds

ClearCount Operation: Troubleshooting

Target card not read - Tabulator reports an error

- Close Tabulator, delete the box, restart Tabulator, and re-scan the box, ensuring that the target card is placed so that the scanner will read the bar-coded side first

No response to Start Scan button or scanner incorrectly reports no paper on the input tray

- With your fingers, press down at the center of the leading edge of the paper and press the Start Scan button

ClearCount Operation: Troubleshooting

Tabulator message or exception is displayed in **red** in the Tabulator Alerts box

- Close Tabulator, delete the box being scanned, restart Tabulator, and re-scan the box

Tabulator message or exception is displayed **without red** in the Tabulator Alerts box

- Take the action indicted by the message and allow Tabulator to continue to run. If the message is repeated continuously, report it to Clear Ballot Technical Support. Tabulator may need to be closed and then started again

ClearCount Operation: Misfeeds and Multifeeds

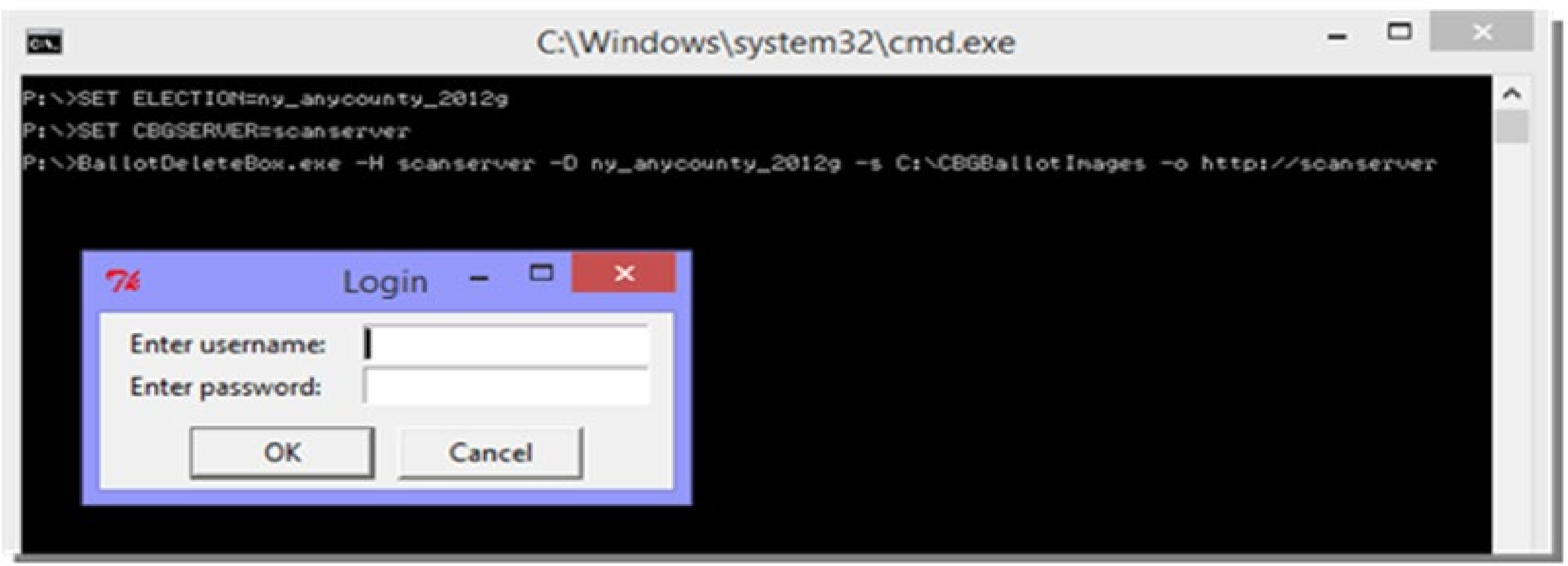
Please refer to the following Quick Guides for more information:

- Misfeeds + Multifeeds 6670
- Misfeeds + Multifeeds 6800
- Misfeeds + Multifeeds 7180

ClearCount Operation: Deleting Boxes

To delete box contents from the ScanStation where the box was scanned:

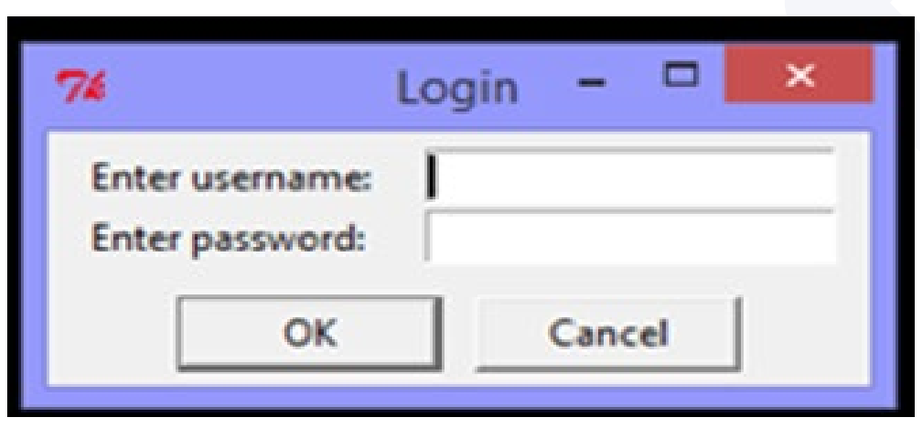
- Ensure the targeted election is active
- Double-click the desktop short cut to the P:drive, and then double-click the DeleteBox.batfile.



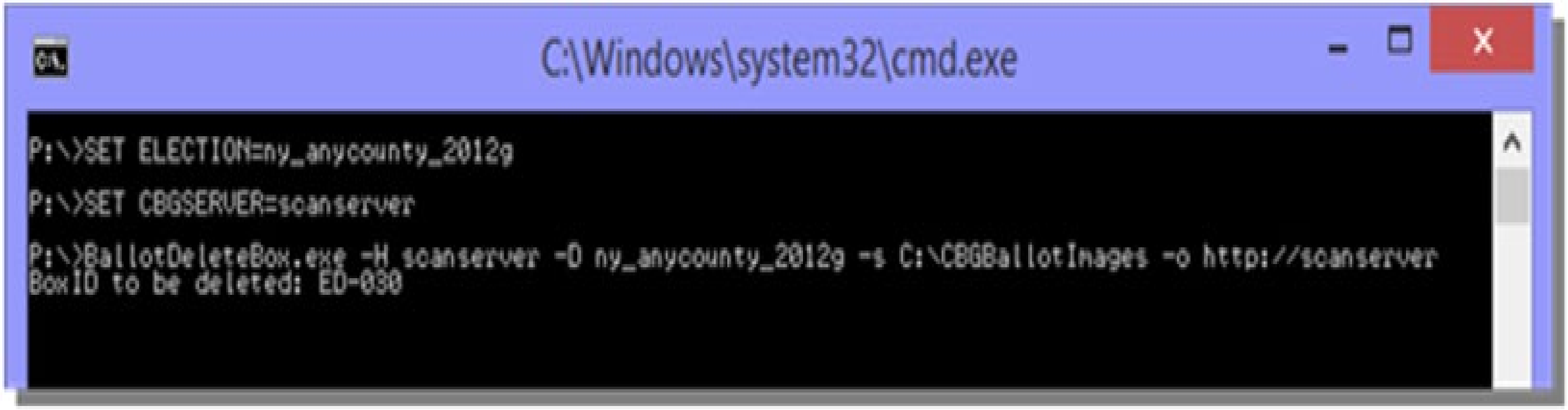
ClearCount Operation: Deleting Boxes

To delete box contents from the ScanStation where the box was scanned:

- The command window and Login dialog for the DeleteBox utility will appear
- Enter the username and password
  - Only users with modify privileges or above can delete a box



ClearCount Operation: Deleting Boxes



At the Box ID to be deleted prompt, type at least one box ID and press the Enter key

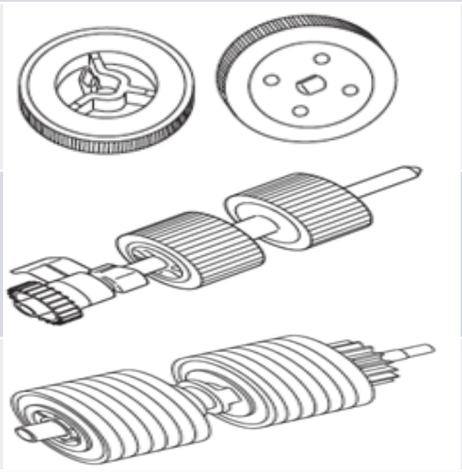
- Use spaces to separate multiple box IDs

- Press any key to exit

ClearCount Operation: Deleting Boxes

With the instructor, perform the procedures for deleting boxes

ClearCount Operation: Consumables/Maintenance

Part Name	Description	fi-6400 Intervals	fi-6800 Intervals	fi-7180 Intervals
ScanAid™ Kit	One **Pick Roller**, one **Separation Roller**, one **Brake roller**, one **Cleaning Kit**: Includes F1 cleaner, cleaning sheets, cleaning cloth, cleaning swabs and instructions			
Pick Roller Set		600,000 sheets or one year	600,000 sheets or one year	Every 200,000 sheets or one year
Brake Roller		600,000 sheets or one year	600,000 sheets or one year	Every 200,000 sheets or one year
Separator Roller		600,000 sheets or one year	600,000 sheets or one year	N/A
Cleaning Kit	One bottle of F1 cleaning fluid, 75 lint-free cleaning cloths with specially formulated F1 cleaning fluid. The cloth effectively removes dirt, toner, carbon, chemicals from treated papers, and other debris from the parts that are in continuous contact with paper	Approximately three months at one application per day, or one month at three applications per day	Approximately three months at one application per day, or one month at three applications per day	Approximately three months at one application per day, or one month at three applications per day

ClearCount Operation: Consumables/Maintenance

With the instructor, perform the procedures for accessing components of the scanner for cleaning and maintenance

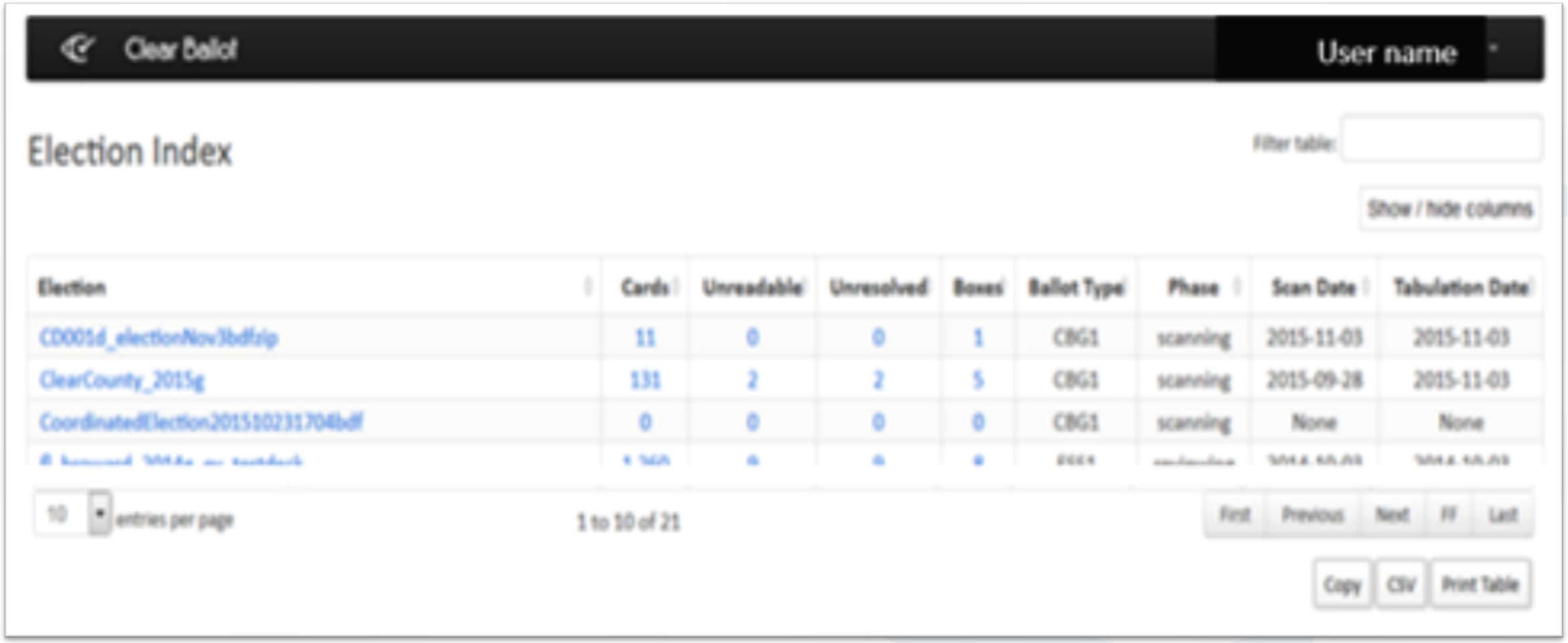
ClearCount: Election Reports

- Enter your user name and password
- Click Sign In

ClearCount: Election Reports

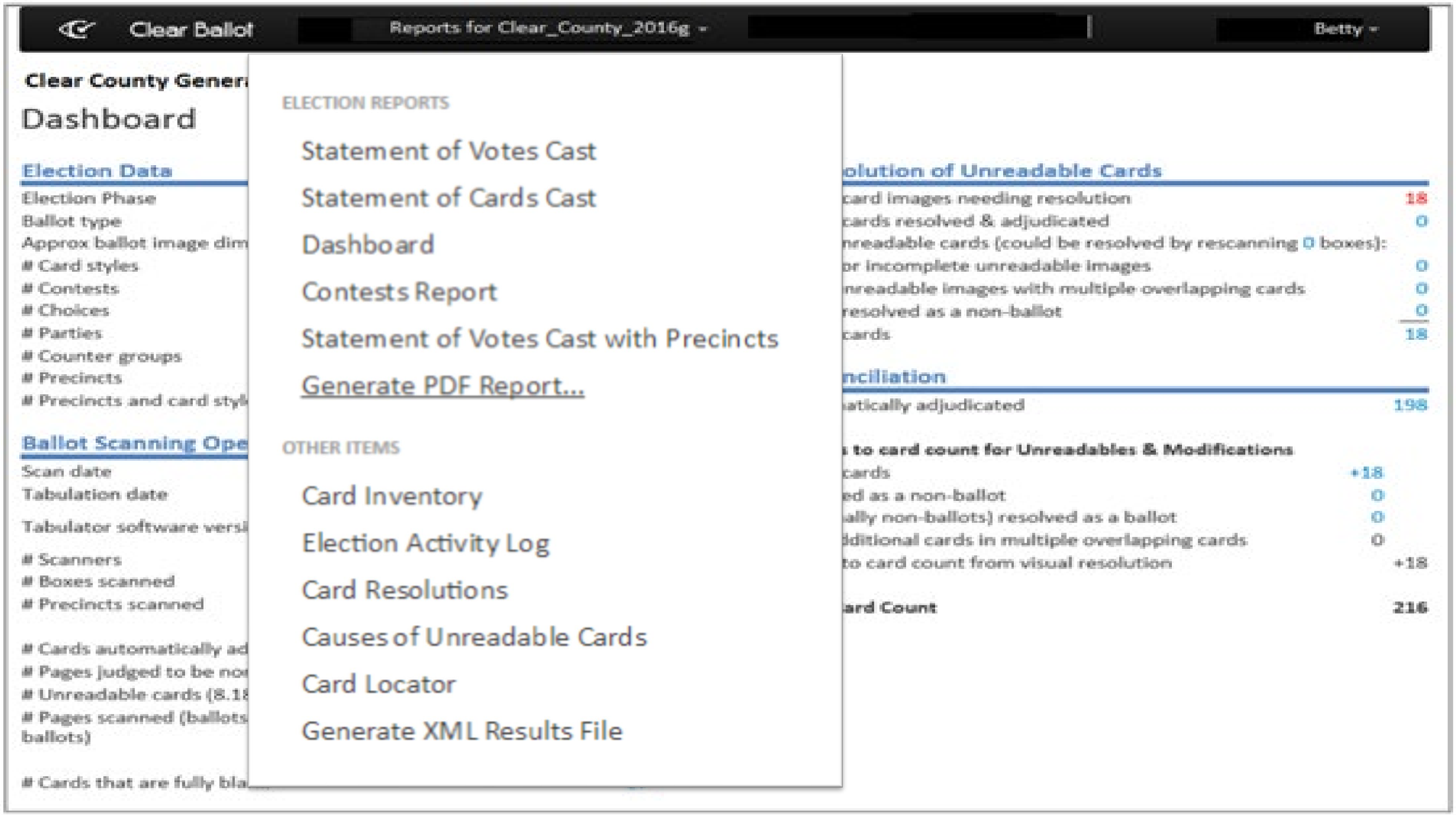
The Election Index page appears

- From the Election column, select the election whose data you want to view



ClearCount: Election Reports

The Dashboard appears. Click the down arrow next to the election name



ClearCount: Election Reports

Generate PDF report - Preferences review

Structure

Report Type

Votes by Geography, Contests by Counter Group

Type of Geography

Precincts

Level of Detail

Detail and Grand Total

- [ ] Sort choices by their order (not Vote total)
- [ ] Hide Counter Group subtotals
- [ ] Hide Overvote and Undervote counts
- [ ] Hide Turnout
- [ ] Hide Precincts Reported
- [ ] Hide Vote Percentages
- [ ] Redact Small Vote Subtotals

Page Size

Letter Portrait (8.5 x 11)

Labels

Output PDF name (optional)

Output PDF file name

Report Title

Statement of Votes Cast by Geography

Election Name

2016 Primary, May 17 2016

Report Comment (optional)

Example: Unofficial Results

Date Comment (optional)

Example: Next Report at 7:30pm

Page Footer (optional)

Page Footer

Filters

Precinct:

All

District:

All

Counter Group:

All

Contest:

All

ScanStation:

All

Box:

All

ClearCount: Election Reports

With the instructor, perform the procedures for viewing and generating reports

ClearCount: System Logs

Web Activity Log (User Menu)

Web Activity Log

Filter table:

Start Date: 2014-12-23 End Date: 2014-12-23 Change

Time	Source	Election	User	Machine	Severity	Message	URL
2014-12-23 08:29:59	WebServer		cbg	192.168.15.108	info	Login successful for cbg	/login?backto=/
2014-12-23 08:30:00	WebServer		cbg	192.168.15.108	info	Elections	/
2014-12-23 09:01:37	WebServer	ny_anycounty_2012g	cbg	192.168.15.108	info	Dashboard - ny_anycounty_2012g	/dash/ny_anycounty_2012g
2014-12-23 09:25:37	WebServer		cbg	192.168.15.108	info	DbAdmin	/admin/db
2014-12-23 09:26:55	WebServer		cbg	192.168.15.108	info	UserAdmin	/admin/user
2014-12-23 09:27:17	AdminUser		cbg	192.168.15.108	info	Created user Mary	/admin/user/create
2014-12-23 09:27:18	WebServer		cbg	192.168.15.108	info	UserAdmin	/admin/user
2014-12-23 09:41:29	WebServer		Mary	192.168.15.108	info	Login successful for Mary	/login?backto=/
2014-12-23 09:41:30	WebServer		Mary	192.168.15.108	info	Elections	/
2014-12-23 09:41:45	WebServer		Mary	192.168.15.108	info	DbAdmin	/admin/db

All entries per page 1 to 10 of 10 First Previous Next FF Last

Copy CSV Print

ClearCount: System Logs

Web activity log

- Tracks all users' web-based actions for all elections
- Logins, logouts
- Authentication failures
- User access to election reports and card images
- Election management
- User management

ClearCount: System Logs

Election activity log (Reports Menu)

Filter table:

Election Activity Log

Start Date: 2015-08-23 End Date: 2015-09-08 Change

Show / hide columns

Time	Source	Election	User	Machine	Severity	Message	URL
2015-08-24 11:43:14	WebServer	fl_bay_2014g_test	quevedo	172.56.38.165	info	Dashboard - fl_bay_2014g_test	/dash/fl_bay_2014g_test
2015-08-24 11:43:21	WebServer	fl_bay_2014g_test	quevedo	172.56.38.165	info	Inventory - fl_bay_2014g_test	/boxes/fl_bay_2014g_test
2015-08-24 11:43:30	WebServer	fl_bay_2014g_test	quevedo	172.56.38.165	info	Inventory - fl_bay_2014g_test	/boxes/fl_bay_2014g_test?VoterGroupID=ED
2015-08-24 11:43:57	WebServer	fl_bay_2014g_test	quevedo	172.56.38.165	info	Inventory - fl_bay_2014g_test	/boxes/fl_bay_2014g_test?VoterGroupID=AB
2015-08-26 14:36:42	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Dashboard - fl_bay_2014g_test	/dash/fl_bay_2014g_test
2015-08-26 14:36:53	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Contests - fl_bay_2014g_test	/contests/fl_bay_2014g_test
2015-08-26 14:37:57	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Cards - fl_bay_2014g_test	/thumbs/fl_bay_2014g_test?ContestOV=1&DisplayContestID=1&PrecinctID=&VoterGroupID=
2015-08-26 14:38:03	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Side AB-013+10313.jpg - fl_bay_2014g_test	/side/fl_bay_2014g_test/AB-013+10313.jpg
2015-08-26 14:38:33	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Cards - fl_bay_2014g_test	/thumbs/fl_bay_2014g_test?ContestOV=2&DisplayContestID=2&PrecinctID=&VoterGroupID=
2015-08-26 14:39:06	WebServer	fl_bay_2014g_test	quevedo	172.56.39.139	info	Side ED-039+11129.jpg - fl_bay_2014g_test	/side/fl_bay_2014g_test/ED-039+11129.jpg

10 entries per page 1 to 10 of 174 First Previous Next FF Last

Copy CSV Print

ClearCount: System Logs

Election activity log

- User access to election reports and logs
- Tabulator start, processing, and end events
- Probable target card and scanning error identification
- Scanner warning and error messages
- Overall scanning rate and progress across ScanStations
- Election backups include the election activity log

ClearCount Reporting: Unreadable Cards

Unreadable card images needing resolution

- Number of initially unreadable cards that remain unresolved – Clicking on the number opens the Card Resolutions report

Clear Ballot [redacted] Reports for Clear_County_2016g [redacted] Betty

Clear County General Election, Nov 08, 2016

Dashboard

Election Data

Election Phase	reviewing
Ballot type	CBG1
Approx ballot image dimensions	8.5" x 17.0"
# Card styles	218
# Contests	98
# Choices	258
# Parties	65
# Counter groups	6

Visual Resolution of Unreadable Cards

Unreadable card images needing resolution	18
Unreadable cards resolved & adjudicated	0
Unvotable unreadable cards (could be resolved by rescanning 0 boxes):	
Occluded or incomplete unreadable images	0
Scanned unreadable images with multiple overlapping cards	0
Unreadable resolved as a non-ballot	0
Unreadable cards	18

ClearCount Reporting: Unreadable Cards

Clear Ballot | Reports for ClearCounty_2015g | User name

General Election, Jun 21 2016, Clear County

Card Resolutions

Filter table:

Unresolved Cards

Show / hide columns

Card ID	Resolution Status	Unreadable Reason(s)
OT-008+10019	Not yet resolved	Timing marks found on one side, but not on the other side
OT-008+10021	Not yet resolved	Timing marks found on one side, but not on the other side
OT-008+10029	Not yet resolved	Wrong number of RIGHT timing marks (36 at most, expected 41)
OT-008+10031	Not yet resolved	Wrong number of RIGHT timing marks (36 at most, expected 41)

5 entries per page — 1 to 4 of 4

First | Previous | Next | FF | Last

Copy | CSV | Print Table

Resolved Cards

Filter table:

Show / hide columns

Card ID	Resolution Status	Resolver	Resolution Date
No data available in table			

5 entries per page — 0 entries

First | Previous | Next | FF | Last

Copy | CSV | Print Table

ClearCount Reporting: Unreadable Cards

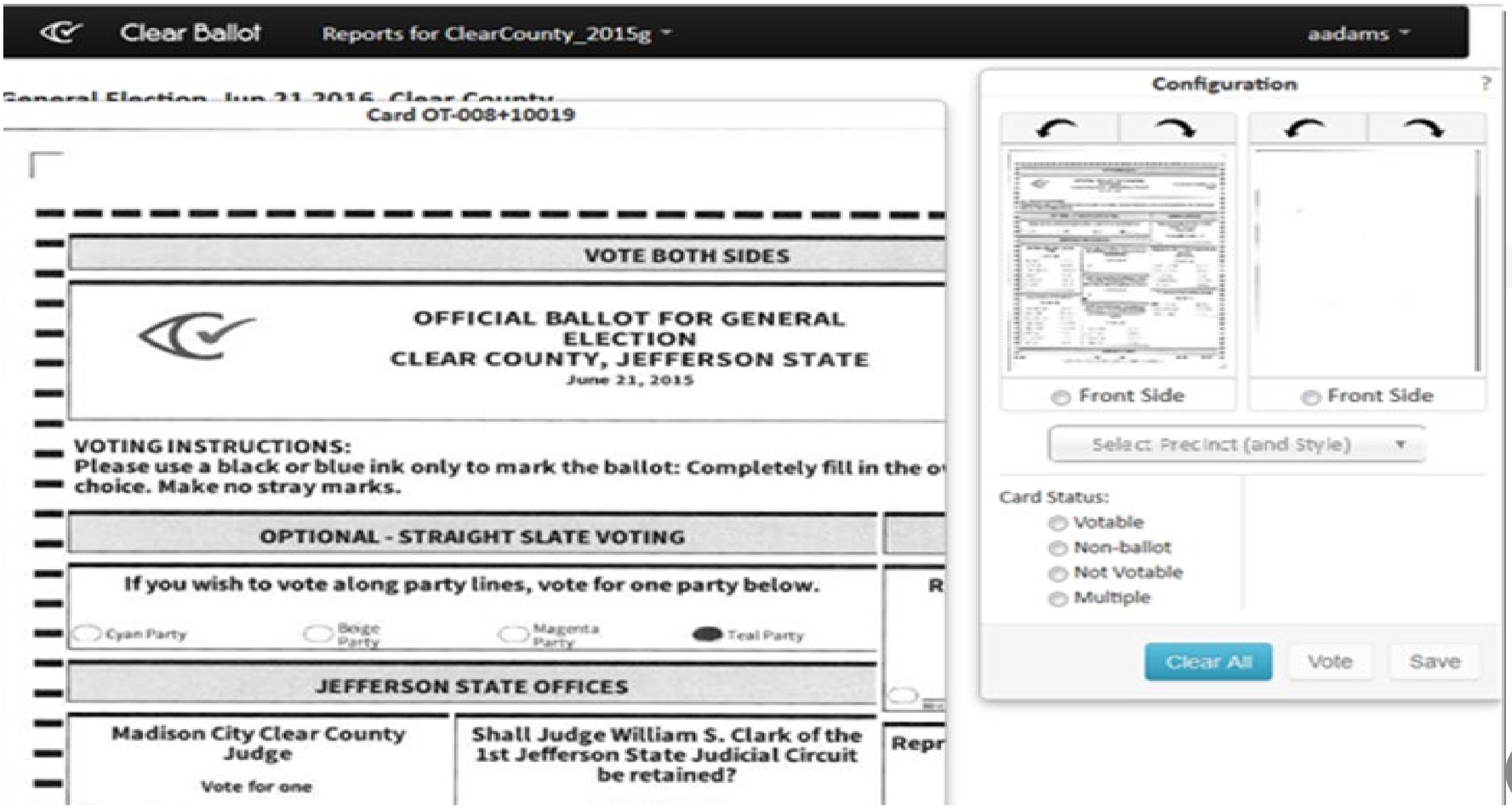
Unresolved Cards

- **Card ID:** Unique identifier for the card – Opens the Card Images report
- **Resolution Status:** Indicates that the card is unresolved
- **Unreadable Reason:** Explains why the card was not adjudicated automatically

Card ID	Resolution Status	Unreadable Reason(s)
OT-008+10019	Not yet resolved	Timing marks found on one side, but not on the other side
OT-008+10021	Not yet resolved	Timing marks found on one side, but not on the other side

ClearCount Reporting: Unreadable Cards

Click a card ID to view the card image in the Card Resolutions tool

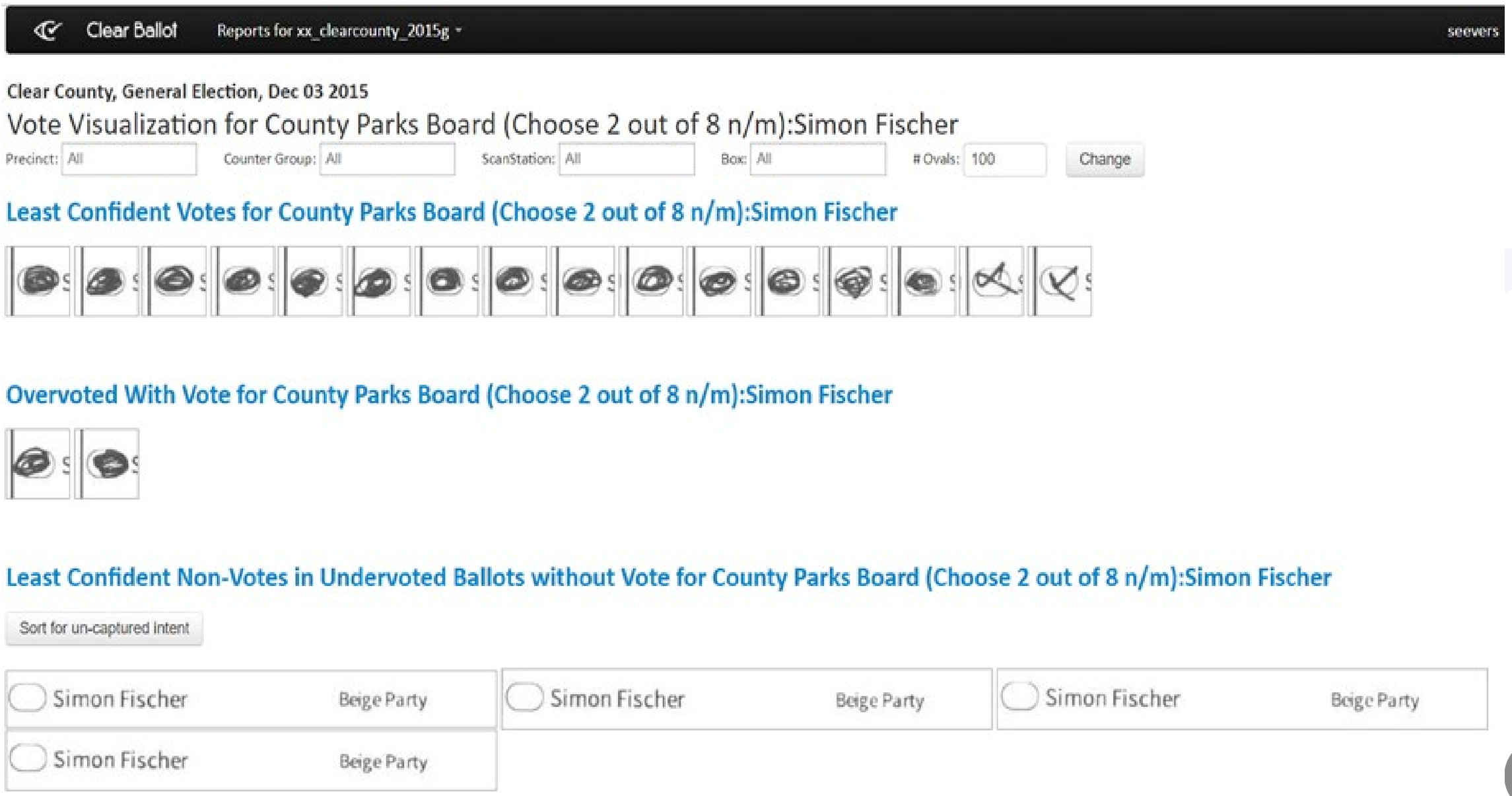


ClearCount Reporting: Unreadable Cards

With the instructor, perform the procedures for viewing and resolving unreadable cards

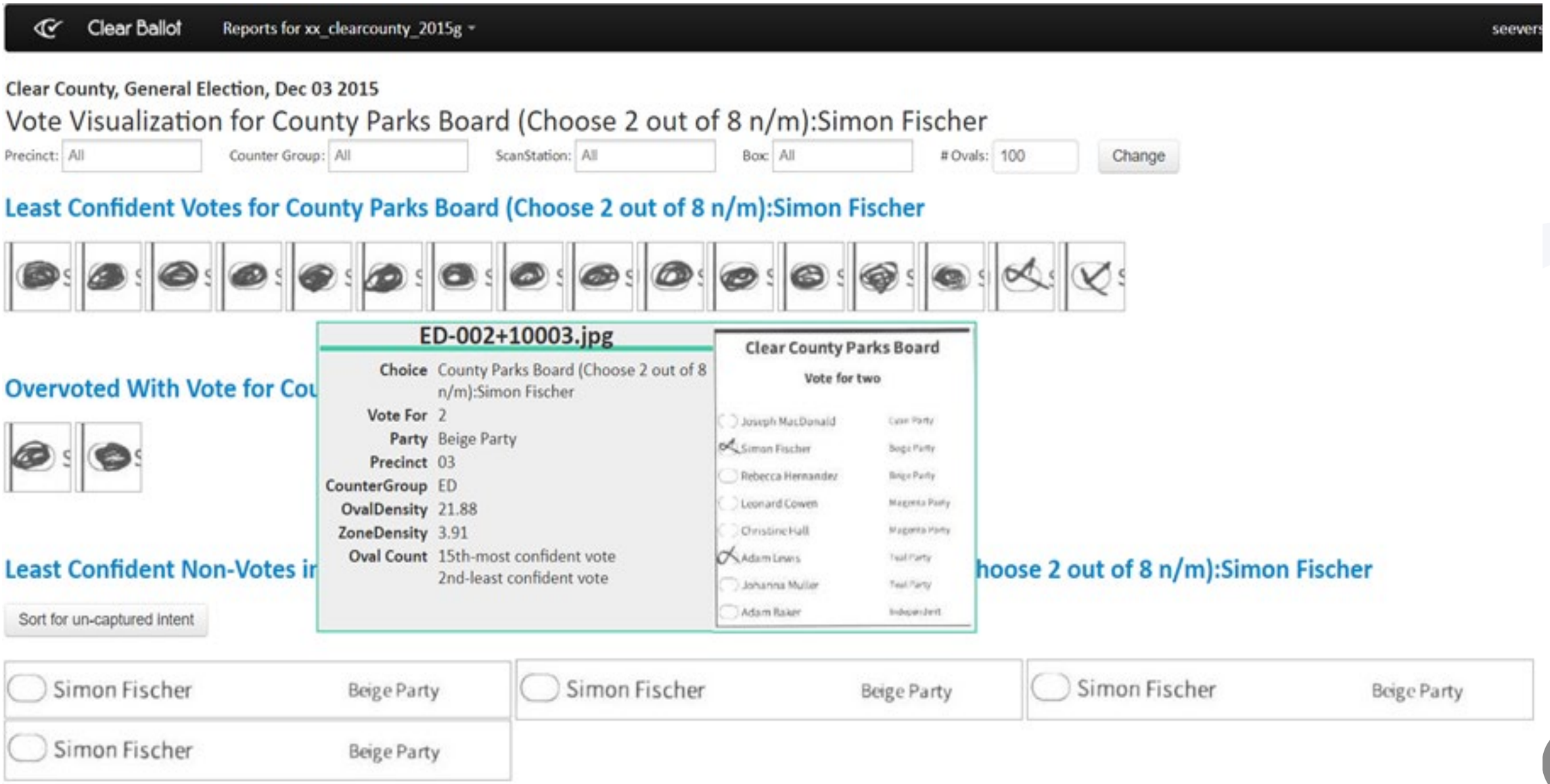
ClearCount Reporting: Oval Visualization

Each oval on the Vote Visualization page links to the full card image



ClearCount Reporting: Oval Visualization

Hovering over an oval displays the contest section of the card for that oval. Clicking an oval opens the Visually Annotated Card page



ClearCount Reporting: Oval Visualization

With the instructor, perform the procedures in the

ClearCount Quick Guide Adjudicating Overvotes

ClearCount Reporting:
Updating Voter Count Totals

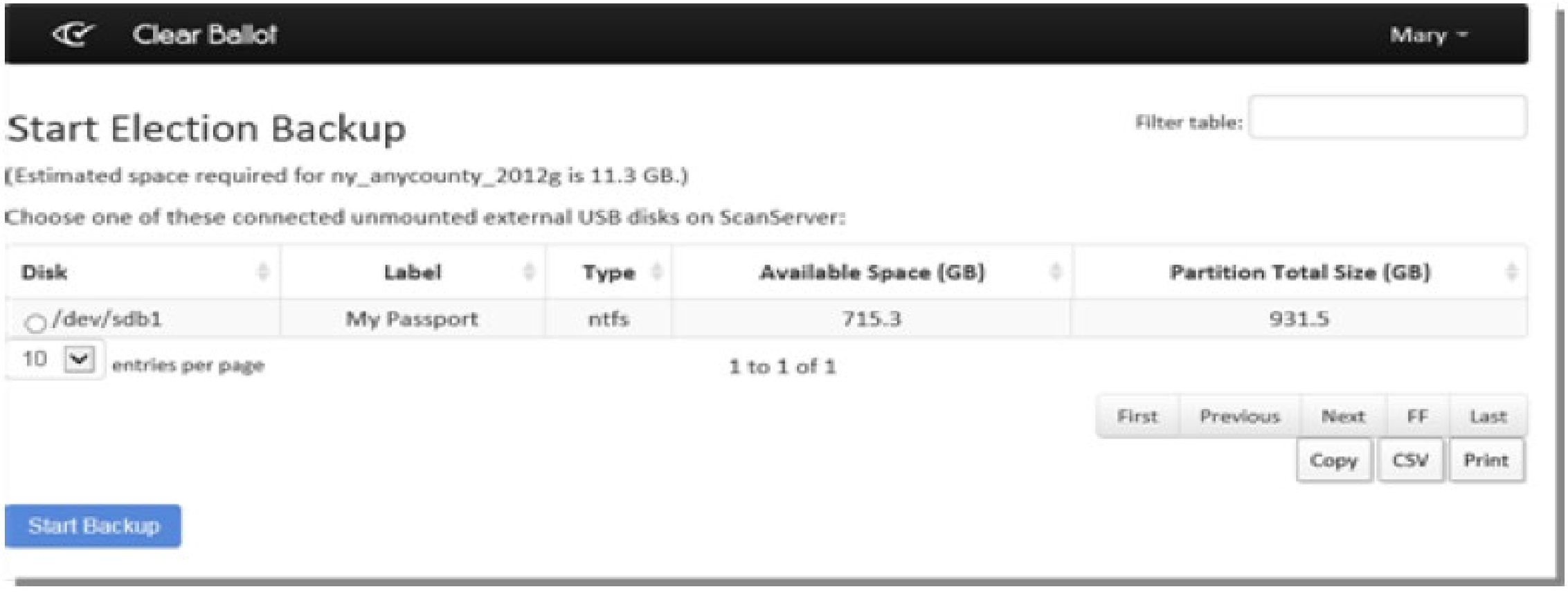
With the instructor,
perform the procedures in the

ClearCount Quick Guide
Updating Voter Count Totals

ClearCount: Election Administration

Election backup:

- Connect an external hard drive to the ScanServer
- From the Election Administration locate the election you want to backup
- In the **Actions** column, select **Backup Election**
- Select the available backup device



ClearCount: Election Administration

Election backup- continued:

- The **Server Background Jobs** page appears. It includes all jobs since the last ScanServer reboot.
- The **Status** cell indicates when the election is backed up

ClearCount: Election Administration

With the instructor, perform the procedures for backing up an election

ClearCount: Election Administration

Election restore

- Connect the external drive with the backup election to the ScanServer
- From the **Election Administration**, click the Restore Election tab
- The **Start Election Restore** page appears
- In the **Disk** column, select the external drive
- Enter the name under which to restore the election
- Click **Start Restore**

ClearCount:
Election Administration

Deleting an election:

- Access the Election Administration page
- Locate the row that contains the election to delete
- Click on the **Actions** button for that row
- The dropdown list of election management appears
- Select **Delete Election**
- A confirmation dialog appears, Click **OK** to continue

Clear Ballot

ClearCount Training

Q&A

Clear Ballot

ClearCount Training

Thank You!