

# The Board of Elections in the City of New York

# **Canvass/Recanvass Procedures**

# **Step-by-Step Section**

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Canvass/Recanvass Procedures

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# STEP-BY-STEP SCANNER, ERM, AND ELECTIONWARE INSTRUCTIONS

## **Central Ballot and Scanning Tabulation System – Scanning Paper Ballots**

- Requirements for Scanning Ballots
- Guidelines to Prepare the Ballots for Scanning
- Prepare the System to Scan Paper Ballots
- Setup the Election Definition Database
- Print the Zero Report
- Scan the Ballots
- Print a Detail Results By ED Report
- Print a Detail Results Report
- Interrupt, Resume or End the Scanning Task
- Export Election Day Results from the Scanner
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- Cancel or Delete a Scanned Ballot Batch and Rescan the Ballots
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## **ELECTIONWARE – Creating EQC, ERM Key and Election Definition PMDs**

- Start Electionware
- Open an Election
- Create the Qualification Media (EQC PMD)
- Create the Election Reporting Key Media (ERM Key)
- Create the Election Data Media (Election Definition PMD)
- Create an XML and HTML File in Electionware

## **ERM – Loading Election Data into Election Reporting Manager**

- Load an Election
- Start Election Reporting Manager (ERM)
- Processing Election Results
- Update Election Results Manually
- Producing Reports
- Exporting Election Results

## **REQUIREMENTS FOR SCANNING BALLOTS:**

Bipartisan Leads must contact the System Administrator in Electronic Voting Systems (EVS) Department at the General Office to obtain these materials:

- > PMD for EQC
- > PMD with the borough-wide election definition database
- Blank PMD to export the election results
- ➢ EQC Code
- ➢ Election Code
- > Override Code

Leads will also need the keys to unlock the Scanner.

## **GUIDELINES TO PREPARE BALLOTS FOR SCANNING**

#### SCANNER OPERATORS

Ballot preparation is the most important factor in the performance of the Scanner. Making the ballots as flat as possible provides the best system operation. Follow these guidelines:

- With perfectly flat ballots, 400 sheets is the maximum number of ballots to scan at one time.
   This number includes the input tray (or ballot hopper) and bottom output tray.
  - The middle and top output trays have a maximum capacity of **200** ballots.
- With folded ballots, use smaller stacks in the input tray (or ballot hopper).
  - Begin with stacks of **25-50** ballots at a time. If the machine processes those batches successfully, slowly increase the batch size.
  - DO NOT USE MORE THAN **150** ballots per batch.
- With Back-Bended ballots, each machine fold must be completely bent back in the opposite direction of the machine fold, to break the grain of the paper.
  - Back bend in stacks of **100** or less ballots. Each Scanner Operator should only back bend as many ballots as they are capable of at a time. For some Operators this may be as few as 10 ballots.
  - If a ballot is properly back bent, breaking the grain of the paper, each fold will move as easily in either direction.
  - If a fold moves easier in the direction of the machine fold, it is not properly back bent.

#### - The minimum capacity of the Scanner is one (1) ballot.

- If a ballot is damaged or heavily creased, run the single ballot into the scanner as a batch of one.
- If a ballot is torn, repair it with a piece of clear tape before running it through the scanner.
- **For Ballot Orientation**, folded ballots must be stacked in the same orientation for proper processing in the Scanner.
- For the Scanner Cart, make sure the arms are extended and secure.

Output Tray	Function
Тор	Holds ballots that are scanned, but not read or tallied. These are the scanner-refused ballots.
Middle	Holds the Filtered Write-in ballots. These are the ballots that need to be record on pink Write-in Forms.
Bottom	Holds ballots that are scanned and read. These ballots are tallied by the scanner and included in the systems' election results.

# PREPARE THE SYSTEM TO SCAN PAPER BALLOTS

- 1. Remove the plastic cover from the Scanner.
- 2. Extend and secure the scanner cart arms.
- 3. Locate the APC Uninterrupted Power Supply (UPS) of the Scanner. Press and hold down the middle button located on the top of the UPS until you hear a beep.
- 4. On the laser printer of the Scanner (OKI, Model #B431dn), locate the **On/Off** switch on the lower front, right side and turn it **On**.
- 5. On the dot matrix printer (OKI Microline 420), locate the **On/Off** switch on the lower back, right side and turn it on. The dot matrix printer will print an audit log showing system information.
- 6. Locate the **On/Off** switch on the left side of the Scanner and unlock the small compartment glass door with the scanner keys.
- 7. Turn the Scanner **On** and wait until the monitor boots up. **This takes several seconds**.
- 8. Close and lock the small compartment glass door on the left side of the Scanner.

**NOTE:** The glass door cannot be locked unless the cables are lined up with the open notches.

## SET UP THE ELECTION DEFINITION DATABASE

- 1. From the Startup screen, press Setup
- 2. Unlock the top PMD compartment located on the right side of the Scanner
- 3. Insert the EQC PMD into the left USB port
- 4. The scanner displays: Detecting the Device
- 5. From the **Setup** screen, press **Clear and Initialize**
- 6. From the **Clear and Initialize** screen, enter the EQC code and press **Accept** A message displays: **Valid EQC Media was Found**.
  - a. If the **Valid EQC Media...** prompt does not display, recreate the EQC PMD and repeat steps 1 through 6
- 7. Press Yes
- 8. A message displays: Clear and Initialize Successful
- 9. Remove the EQC PMD and press **Done**
- 10. On the Setup screen, verify all Ballot Counts displayed on the screen are zero
  - a. **IMPORTANT:** If a Ballot Count is not zero, contact the EVS System Administrator at the General Office immediately.
- 11. From the top PMD compartment located on the right side of the Scanner, insert the Election Definition PMD into the left USB port. This message displays on the screen:

#### Please Wait ... Detecting Inserted Device ....

- 12. Press Load Election
- 13. Enter the **Election Code** in the data entry field
- 14. Press Accept
- 15. On the Load Election screen, this message displays: A valid Election Definition was found
  - **a. NOTE:** If that message does not display, recreate the Election Definition PMD and reload the election.
  - **b.** If the problem continues, contact the System Administrator immediately.
- 16. Verify the election name and election date displayed on the screen are correct and press Yes
- 17. This message displays: Please Wait ... Loading the Election Definition ....
- 18. On the **Load Election** screen, this message will display:

#### The Election Definition was successfully loaded

- 19. Press Done
- 20. Remove the Election Definition PMD from the USB port and press OK
- 21. The Setup screen displays
- 22. Close and lock the small compartment glass door with the scanner keys

# **ELECTION DEFINITION DATABASE SCREEN IMAGES**

1 Poll One 2012-02-04	2/8/12 2:50 PM	1 PRECINC	T1 2	010-1	1-02								11/5/	10 2 💉 🖻	::15 PM
Menu Setup	(2) Nop	Election Code								(?) Help					
ES&S DS850 <sup>™</sup> Central Tabulator Version 2.40.0				C		Pleas	se ente	r the	electi	ion co	ode.		)		
Election Status: Blank Log Printing: Enabled Results Printing: Disabled Settings Ballot Counts Processing Mode:: Precinct Selection Off Precinct Selecton: Auto Print Bin Reports: Off Collected: Collected: Clear and Initialize Load Election	0 12 12			! W Caps Lock X	e E A C	3 R S	s % 4 5 T Y D F B N	U G	    		( 9 R K ? / ackspa	) 0 { L 	- +		
	29/10 9:49 AM 🕼 🖋 🖻 🕏 🊔 View Help	1 PRECI	NCT 1	2010	-11-02		Loa	d E	lect	tion	1			l09:	49 AM
A valid Election Definition was found.      Election Name:BMWENG     Election Date: 2010-11-02      Do you wish to continue the Load Election Definition process?				✓	Before are se result Pleas	e scanni et for the in ballo e remov	n Defir ng ballor appropr i jams in e the Ele en press	s, plea iate ba the out ection E	se verif llot leng tput tray Definitio	y that t oth. Fa /s. n medi	the out illure to	put tray o do so	stops will		ļ

## Note the date and time in the upper right corner of the screen.

If it needs updating, make the correction before scanning ballots.

#### To change the date and time:

- 1. Touch the **System** tab on the screen to display the System menu.
- 2. Follow the system prompts to: **Change Date** and **Change Time**.



## PRINT THE ZERO REPORT

- 1. From the top left side of the **Setup** screen, press **Menu**.
- 2. On the Election screen, press the Reports button on the left (unless it is already highlighted).
- 3. From the **Reports** screen, press **Zero Report**.
- 4. Press **Print**. The report is printed on the laser printer.
- 5. Bipartisan Leads verify report only contains zeros. Leads also confirm the date and time.
- 6. Press OK.

			Zero Report		1 of 2
			Machine ID: A Machine #: 8509420001		Electionware County INITIALSTEST1
			09/23/20YY 09:50:07		09/22/20YY
			First Ballot Date Time: Last Ballot Date Time:		Total Sheets Processed: 0 Total Ballots Cast: 0 Blank Sheets Cast: 0
			Contest	Votes	
06GENANY 2015-10-22 Absentee	Reports	11/11/15 2:23 PM	BEST AUTOMOBILE MANUFACTURER (Vote For 1) BMW MERCEDES	0 0 0 0	
Scarring Pl Report Type Election Zero Report Reports Results Report System Batch/Bin Rep Hardware System Readi Ballot Style Co	oort cessed Report ness Report	rint.	BEST VOCAL ARTIST (Vote For 2) FRANK SINATRA ELVIS	0 0 0 0 0 0 0 0 0 0 0 0 0 0	

PLEASE NOTE: A Zero Report is only available if no ballots were scanned.

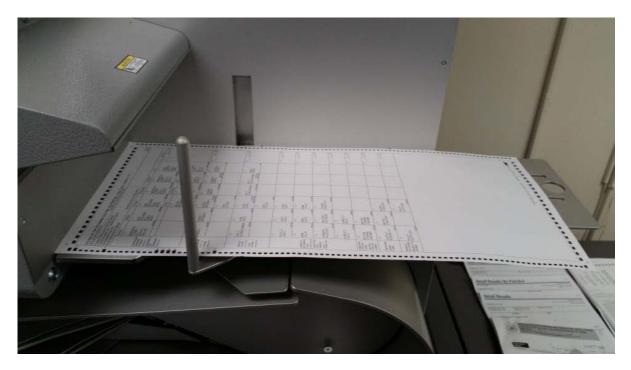
## SCAN THE BALLOTS

1. For the Input Tray and all three output trays, using a ballot as a guide, extend the trays by the length of the ballot (14, 17, or 19 inches) within the trays. Use the ruler on the left side of the trays and the line notch on the right of the trays as your guide.

**NOTE:** The bottom output tray does not extend as far out as the first and second output trays. See below.



- 2. Using the "**Guidelines to Prepare Ballots for Scanning**" shown in this section, place ballots to be scanned in the Ballot Hopper on the top right side of the SCANNER.
- 3. Adjust the paper guides on the Ballot Hopper upper trays on the left side so ballots feed into scanner smoothly. If the ballots are too long for the hopper, adjust ballot hopper and upper tray extender to accommodate the ballots. See illustration that follows.



- 4. From the **Reports** screen, press the **Scanning** button on the left side of the screen.
- 5. From the **Scanning** screen, press the **Scan Ballots** button.
- 6. From the Scan Ballots screen, make sure the HEADER control function is ON.
  - a. If it's not ON, press the **OFF** button under the **HEADER**.
  - b. A message displays "Header Control Enabled. The scanner will use headers to select ED."
  - c. Press OK. See images below.

enu		Sca	n E	Ballots	
<b>V</b> <sup>1</sup>	oad Ba	allots			
Mode:	Header	Controlled			HEADER S
	908IMPT 15-06-12	Early Vote		8	6/25/15 10:00 AM
	Menu	Sc	an	Ballots	C Rele
	0	Precinct: Not Selecte	d	0	See Details
		Precinct Selection On Int: NONE		HEAD	
		Current		Saved	
		Top Bin	0		
		Middle Bin	0	Middle Bin	2
		Bottom Bin	0	Bottom Bin	2
		Total	0	Total	4
		Current Batch: T0004		Last Export: 2015-11-05 16:51:12	Total: 4
	Sta	t Stop		Save	Select Precinct

- 7. Place the batch of ballots on the input tray with the ED Header sheet on top, face up.
- 8. From the **Scan Ballots** screen, press **Start** to begin scanning ballots.
- 9. If all the scanned ballots are in the bottom bin, skip to step 20.
- 10. Remove ballots from the top bin and sort them by ED so they can be rescanned, one ED at a time.
  - a. Place the refused ballots from the same ED back on the input tray.
  - b. Reposition the ballots if necessary.
  - c. From the **Scan Ballots** screen, press the Red  $\mathbf{X}$  next to **Top Bin**.
  - d. This message displays: **Rescan Out-Stacks**?
  - e. Press **Continue**.
- 11. Press the **ON** button under **HEADER**.
  - a. This message displays: Header Control Disabled. Select ED manually.
  - b. Press **OK**.
- 12. Press Select ED
- 13. Enter the three-digit ED and press **SEARCH**.
- 14. Find the ED/AD for the refused ballots on the screen and press it. Make sure it's highlighted when pressed.
- 15. Press Next.
- 16. Review your choice.
  - a. If correct, go to the next step.
  - b. If it's not correct, press the **Back** button twice and **go back to step 12**.
- 17. Press **Next** again to confirm.
- 18. Press Start.
- 19. **Repeat steps 12-18** until **all** refused ballots are rescanned.
- 20. Press **Save** to save the scanned ballot batch to the election results. This message will display:

#### Save current batch of ... ballots?

- 21. Press **Save** again to confirm the save.
- 22. Press **OK**.
- 23. From the **Scan Ballots** screen, press **Scan** to continue scanning or press **Done** when finished.

## PRINT A DETAIL RESULTS BY ED REPORT

For each Election District in the batch that is worked on, print a report of the ballots scanned for that ED by following these steps:

- 1. From the left side of the **Scanning** screen, press **Reports**.
- 2. From the Reports Screen, press Results Report.
- 3. Select ED by ED Detail. Press Select ED.
- 4. From the **Select ED** screen, enter any part of a string, like:

AD: 23 ED: 001, AD: 23, or 23, ED: 001, or 001 and then press Search.

- Press one ED listed and press Next or press Back to search again. This message will display: Select ED confirming the ED entered.
- 6. Press Next to confirm ED or, press Back to search again.
- 7. From the Reports Screen, press Print to generate a Detail Results by Precinct Report.
- 8. You will see Report was sent to printer ...
- 9. Press OK.

## Sample screen images Select **Election District** will display instead of Select **Precinct**.

G908IMPT 2015-06-12   Early Vote	6/25/15 10 0 💉 🚇	MPT 6-12   Early Vote		6/25/15 10:01 AM 0 💉 🖻 😨 🌥
Sel	ect Precinct	Sele	ect Precinct	(?) Help
Select Precinct: Results Instructions: Select the Precinct you want and then press 'Next'. If the Precinct you are looking for is not available, press 'Back' to start a new search	1246 Results Found         0015 - AD. 64, ED. 017         0016 - AD. 64, ED. 016         0017 - AD. 64, ED. 009         0018 - AD. 64, ED. 002         0019 - AD. 64, ED. 026         0020 - AD. 64, ED. 014         0021 - AD. 64, ED. 038         Page 2 of 178         Back	Select Precinct: Confirmation Instructions: Flease review the Precinct you selected. If it is correct press 'Next'. If it is not correct, select 'Back' to see available options or 'Search' to start a new search.	Review Your Choice Precinct Selection 0020 - AD: 64, ED: 014 Back Next	Edit

## PRINT A DETAIL RESULTS REPORT

1. Press Menu.

- 2. From the left side of the screen, press **Reports**.
- 3. From **Reports** screen, press **Results Report**. The **Report Level** screen will display on the right.
- 4. Press Election Detail to generate the report.
- 5. Press **Print**. This message will display: **Generating Report**
- 6. From **Print Report** screen, press **OK**.

06GENANY 2015-10-22   Abs	sentee				11	/11/15 :	
	Jenice	R	Repor	ts			2
		Discos					
Scanning	Report T		lect the r	Report to pr	eview/print vel	•	
Election	Zero Re	port		Elec	tion Detail		
Reports	Results	-		Elec	tion Public		
Reports				Prec	inct by Precin	ct Detail	
System		Sin Report	_	Prec	inct by Precine	ct Public	
Hardware		ts Processed Re		1003 - PRE			
	System	Readiness Repo	rt 🔹	1003 - PRE Sela		elect Al	
	Ballot S	ityle Counts Rep	ort 🗜	Preci		recincts	
Exit		Previe	w		Print		
Detail Re	esults	5					1 of 2
Machine ID: A	Machine #	¥: 8509420001					onware County NITIALSTEST1
09/23/20YY 09:50	0:07					1	09/22/20YY
First Ballot Date T Last Ballot Date T		09/23/20YY 09 09/23/20YY 11		Total Shee Total Ballo Blank Shee		65 65 2	
I	Reporting	gTag	Ball	ots Cast			
Military Presidential				21 22			
Absentee				22			
Election Day				0			
		ntest		Votes			
BEST AUTOMOB (Vote For 1)	BILE MAN	UFACTURER					
BMW MERCEDES							
GENERAL MOTOR	s						
HONDA FORD							
VOLVO Write-in							
write-in		Over Votes		0			
	, i	Under Votes Total		3 65			
BEST VOCAL AR (Vote For 2)	TIST						
FRANK SINATRA.							
PATSY CLINE				19			
JANIS JOPLIN BUDDY HOLLY							
BARRY WHITE				1			
BILLIE HOLIDAY STEVIE RAY VAUG "MAMA" CASS ELL	GHAN			10			
Write-in				1			
Write-in		Over Votes		0 0			
		Under Votes		9			
		Total		130			

# INTERRUPT, RESUME, OR END THE SCANNING TASK

PLEASE NOTE: For each day of scanning and for each interruption of the scanning process, it is mandatory

to stop the scanning process early enough to perform the steps shown below. Allow a minimum of 40 minutes.

FOR MORNING, LUNCH AND DINNER BREAKS, INTERRUPT THE SCANNING PROCESS AS FOLLOWS:

- 1. Print a **Detail Results Report**. See instructions in this section.
- 2. Press **Exit** from the bottom of the screen.
- 3. Press Lock Scanner.
- 4. Press Lock.
- 5. Scanner Locked displays.
- 6. The **Scanner Locked** screen remains displayed until:
  - a) The scanner is unlocked and scanning begins again, or
  - b) The scanner is shutdown



#### **RESUME THE SCANNING PROCESS:**

- 1. From Scanner Locked screen, press Unlock.
- 2. Enter the Election Code and press Accept.
- 3. Print a Detail Results Report. See instructions on previous page.
- 4. Compare election results from the **Detail Results Report** at the beginning of the break to the **Detail Results Report** at the end of the break. The results must be the same.

NOTE: If the results do not match, contact the EVS System Administrator immediately.

## **EXPORT ELECTION RESULTS FROM THE SCANNER**

1. Press **Election** on the left side of the screen.

- 2. Press Results.
- 3. Press **Export Files**.
- 4. Unlock the top USB compartment on the right side of the Scanner.
- 5. Insert a blank PMD into the top left USB port.
  - a) If a message reads: **! Attention Invalid... The inserted media is not valid.** This means the PMD is not blank. Remove the PMD and format it on a PC to delete any data. Then repeat the previous steps.
- 6. Enter Election Code and press Accept.
- 7. Press Confirm.
- 8. Wait for this message to display: The results were successfully exported.
- 9. Press **Done**.
- 10. Remove PMD from USB port.
- 11. Close and lock the glass compartment on the Scanner.

1 Poll One 2012-02-04		2/8/12 2:50 PM 0 💉 🖻 😨 🚔
🧲 Menu	Results	() Help
	Export Results	
	Export Files	
	Backup	
	Export Audit Log	
	Clear All Results	
	Clear A Precinct	

## CLEAR OR DELETE AN ED THAT WAS SCANNED

1. Press Menu.

- 2. Press **Election** from the **Election** screen.
- 3. Press **Results** for the results options.
- 4. Press **Clear A ED** from the Results screen.
- 5. When prompted, enter the **Override Code** and press **Accept**.
- 6. Search for and select the ED to delete or press **Back** to search again.
- 7. Press **Next** on Select ED Screen.
- 8. Press Next on the Confirm Screen to confirm the selected ED or press Back to search again.
- 9. From the **Clear ED Results** screen, press **Clear Results**.
- 10. Press Done.

# CANCEL OR DELETE A SCANNED BALLOT BATCH AND RESCAN THE BALLOTS

**NOTE:** This action can only be done before the batch of ballots is saved. If the ballot batch is saved, follow the **Clear or Delete an ED That Was Scanned** process.

- 1. From the **Scan Ballot** screen, press the  $\mathbf{X}$  next to **Total** to cancel or delete the ballot batch.
- 2. Enter the **Election Code** and press **Accept**.
- 3. This message will display: Delete current batch of scanned ballots?
- 4. To delete the ED just scanned, press **Delete**.
- 5. This confirmation message will display: Deleted batch of ballots.
- 6. To keep the ED just scanned, press **Cancel**. To delete the ED just scanned, press **Delete**.
- 7. Press **Scan** to resume scanning or press **Done** if finished scanning.

PACROSS 2014-11-12   Poll	One			11/13/14 12:34 PM
	Sca	n B	allots	(? Help
Lo	ad Ballots			
Mode: Pr	ecinct Selection Off			ON
	Current		Saved	
	Top Bin	0		
	Middle Bin	3	Middle Bin	16
	Bottom Bin	0	Bottom Bin	2
×	Total	3	Total	18
0	Current Batch: S0002	L	ast Export: 2015-11-05 16:51:12	Total: 4
Start	Stop		Save	Select Precinct

## SHUTDOWN THE SCANNER

- 1. Press Menu.
- 2. Press Exit.
- 3. Press Shutdown Scanner.

1 PRECINCT 1 2010-	11-01	
	Scanning	9
Scanning		
Election		
	Lock Scanner	
	Shutdown Scanner	
	Exit	

#### 4. Press Shutdown.

- 5. Wait until this message displays: It is now safe to turn off the machine.
- 6. Unlock the small glass door on the left side with the scanner keys and locate the On/Off switch.
- 7. Turn Scanner off. **NOTE**: 0 = Off 1 = On
- Close and lock the small glass door with the scanner keys.
   NOTE: The glass door cannot be locked unless the cables are lined up with the open notches.
- 9. On the dot matrix printer, locate the On/Off switch on the lower back, right side and turn Off.
- 10. On the laser printer, locate the On/Off switch on the lower front right side and turn Off.
- 11. Locate the APC Uninterrupted Power Supply (UPS) of the Scanner.
- 12. Press and hold down the middle button located on the top of the UPS until a beep is heard, then turn the UPS **Off**.
- 13. Return the Input/Output trays to their original positions.
- 14. Cover the Scanner.

## **ELECTIONWARE**

## **CREATING EQC, ERM KEY, AND ELECTION DEFINITION PMDs**

## **Borough Leads**

Supplies needed:

- ✓ Blank PMD for EQC
- ✓ Blank PMD for ERM Key
- ✓ Blank PMD for Election Definition

## **START ELECTIONWARE**

From the desktop, double-click **ElectionWare**. This message will display:

- Enter **User Name**. Type in the username.
- Enter **Password**. Type in the password.
- Click Login.

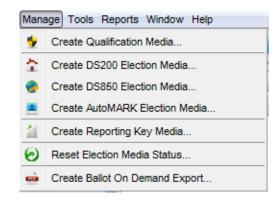
Login	<u> </u>
e	election wanagement system
User Name	admin
Password	•••••
	Login Cancel

## **OPEN AN ELECTION**

- 1. On the Menu bar, click **Window**.
- 2. From the dropdown list, click **Navigator**.
- 3. If the All Elections List panel is not visible, click All Elections List from the tool bar.
- 4. All Elections List displays at the top of the All Elections List panel.
- 5. Click the + next to **City of New York**.
- 6. Click the + next to **County of** and enter [your county].
- 7. Double click the election name to open the election.

## **CREATE THE QUALIFICATION MEDIA (EQC PMD)**

- 1. After the **Open an Election** steps already shown, insert a blank PMD into the USB port.
- 2. On the menu bar, click **Modules**.
- 3. From the dropdown list, click **Deliver**.
- 4. From the dropdown list, click **Package**.
- 5. On the Menu bar, click Manage.
- 6. From the dropdown list, click Create Qualification Media ...
- 7. A window with the name Qualification Media is displayed.
  - a. Select the PMD drive on the **Select Device** dropdown.
  - b. Click Create Media.
  - c. If a Warning window displays, click Yes To All or Yes.
  - d. Click OK.
- 8. Wait until the red light on the PMD stops blinking.
- 9. Remove the PMD.



# **CREATE THE ELECTION REPORTING KEY MEDIA** (**ERM KEY**)

- 1. After the **Open an Election** steps already shown, insert a blank PMD into the USB port.
- 2. On the menu bar, click **Modules**.
- 3. From the dropdown list, click **Deliver**.
- 4. From the dropdown list, click **Package**.
- 5. On the menu bar, click **Manage.**
- 6. From the dropdown list, click Create Reporting Key Media ...
- 7. A window with the name **Reporting Device** displays.
  - a. Select the PMD drive on **Select Device** dropdown.
  - b. Click Create Media.
  - c. If a Warning window displays, click Yes To All or Yes.
  - d. Click **OK**.
- 8. Wait until the red light on the PMD stops blinking.
- 9. Remove the PMD.

# **CREATE THE ELECTION DATA MEDIA** (Election Definition PMD)

- 1. After the **Open an Election** steps already shown, insert a blank PMD into the USB port.
- 2. On the menu bar, click **Modules**.
- 3. From the dropdown list, click **Deliver**.
- 4. From the dropdown list, click **Package**.
- 5. If **Equipment List** panel is not visible, click on **Equipment List** from the tool bar.
- 6. From the **Equipment List** panel:
  - a. Click the + next to **Digital Scan Equipment**.
  - b. Click the + next to **DS850 Counting Station**.
  - c. Scroll down to 99999.
  - d. Right click on 99999.
  - e. Click Create DS850 Election Media.
  - f. A window with the name **DS850 Poll Place 99999** displays.
    - i. Select the PMD drive on the **Select Device** dropdown.
    - ii. Click Create Media.
    - iii. If a Warning window displays, click Yes To All or Yes.
    - iv. Click OK.
- 7. Wait until the red light on PMD stops blinking.
- 8. Remove PMD.

[See next page to create a poll site PMD]

# **CREATE ELECTION POLL SITE MEDIA** (Election Definition PMD for a Specific Poll Site)

- 1. After the **Open an Election** steps already shown, insert a blank PMD into the USB port.
- 2. On the menu bar, click **Modules**.
- 3. From the dropdown list, click **Deliver**.
- 4. From the dropdown list, click **Package**.
- 5. If **Equipment List** panel is not visible, click on **Equipment List** from the tool bar.
- 6. From the **Equipment List** panel:
  - a. Click the + next to **Digital Scan Equipment**.
  - b. Click the + next to **DS850 Counting Station**.
  - c. Scroll down to the **poll site ID** {i.e. B0060, Q0028, M0121, X0093, S0006}.
  - d. **Right click** on the poll site ID.
  - e. Click Create DS850 Election Media.
  - f. A window with the name **DS850 Poll Place** {with poll site ID} displays.
    - i. Select the PMD drive on the Select Device dropdown.
    - ii. Click Create Media.
    - iii. If a Warning window displays, click Yes To All or Yes.
    - iv. Click OK.
- 7. Wait until the red light on PMD stops blinking.
- 8. Remove PMD.

### **ELECTION DAY BALLOTS:** LOADING ELECTION DATA INTO ERM

#### **Borough Leads**

Supplies needed:

✓ 1 ERM Key PMD

#### LOAD AN ELECTION

- 1. From the Desktop, double click the ESS Election Reporting Manager icon.
- 2. A window displays this message: Election Reporting Manager Copyright.
- 3. Click OK.
- 4. Choose one of the following is displayed.
- 5. Click Change to a different Election.
- 6. Click **OK**.
- 7. Election File Directory is displayed.
  - a. Click NYTEST1 under Filename.
  - b. Click **OK**.
  - c. Click OK.
- 8. Insert PMD with **Reporting Key Media** created from Electionware.
- 9. On the menu bar, click **Election**.
- 10. On the dropdown list, click Create ERM from XML Files.
- 11. Enter Qualification Code is displayed.
  - a. Enter the Qualification Code.
  - b. Click **OK**.

#### 12. Number of groups you wish to create is displayed.

One group is required for each type of scanner equipment used. **For Election Day ballots, the number of groups is two (2):** DS200 = Group 1 and DS850 = Group 2.

- a. Enter 2.
- b. Click OK.
- 13. You are about to create the Results Database is displayed.
  - a. Click Yes.

#### 14. Add/Change Groups is displayed.

- a. Go to **Row 1**.
- b. Enter Election Day under Group Description.
- c. Enter Elec Day under Report Description.

- d. On the dropdown list under **Equip**, click **DS2**.
- e. Go to **Row 2**.
- f. Enter Absentee under Group Description.
- g. Enter ABS under Report Description.
- h. On the dropdown list under Equip, click 850.
- i. Click the Absentee Group check box and ensure it is checked.
- j. Click OK.
- 15. Results database files have been created! is displayed.
- 16. Click **OK**.
- 17. Change to Another Election is displayed.
- 18. Click **OK.**
- 19. Create ERM from XML files complete! is displayed.
- 20. Click OK.
- 21. On the menu bar, click Tabulators.
- 22. On the dropdown list, click **DS200** or **DS850**, depending on the group.
- 23. On the dropdown list, click Import & Process Key Memory Device.
- 24. Click OK.
  - a. Import & Process Key Memory Device is displayed.
  - b. Click OK.
  - c. Process Key Media Device Files is complete! is displayed.
  - d. Click OK.
  - e. Remove the ERM Key PMD from the USB port.

## **OTHER PAPER BALLOT KINDS:** LOADING ELECTION DATA INTO ERM

## **Borough Leads**

Supplies needed:

## ✓ 1 ERM Key PMD

#### LOAD AN ELECTION

- 1. From the Desktop, double click the ESS Election Reporting Manager icon.
- 2. A window displays this message: Election Reporting Manager Copyright.
- 3. Click OK.
- 4. Choose one of the following is displayed.
- 5. Click Change to a different Election.
- 6. Click OK.
- 7. Election File Directory is displayed.
  - a. Click NYTEST1 under Filename.
  - b. Click OK.
  - c. Click **OK**.
- 8. Insert PMD with **Reporting Key Media** created from Electionware.
- 9. On the menu bar, click **Election**.
- 10. On the dropdown list, click Create ERM from XML Files.
- 11. Enter Qualification Code is displayed.
  - a. Enter the Qualification Code.
  - b. Click **OK**.
- 12. Number of groups you wish to create is displayed.

One group is required for each type of scanner equipment used. **For Other Paper Ballot Kinds, the number of groups is one (1).** The DS850 is the only scanner equipment that will be used.

- a. Enter 1.
- b. Click OK.
- 13. You are about to create the Results Database displays.
  - a. Click Yes.
- 14. Add/Change Groups is displayed.
  - a. Go to **Row 1**.
  - b. Enter **DS850** under **Group Description**.
  - c. Enter **DS850** under **Report Description**.

- d. On the dropdown list under Equip, click 850.
- e. Click the Absentee Group check box and ensure it is checked.
- f. Click OK.
- 15. Results database files have been created! is displayed.
- 16. Click **OK**.
- 17. Change to Another Election is displayed.
- 18. Click **OK**.
- 19. Create ERM from XML files complete! is displayed.
- 20. Click **OK**.
- 21. On the menu bar, click **Tabulators**.
- 22. On the dropdown list, click **DS850**.
- 23. On the dropdown list, click Import & Process Key Memory Device.
- 24. Click OK.
  - a. Import & Process Key Memory Device is displayed.
  - b. Click **OK**.
  - c. Process Key Media Device Files is complete! is displayed.
  - d. Click **OK**.
  - e. Remove the ERM Key PMD from the USB port.

# **START ELECTION REPORTING MANAGER (ERM)**

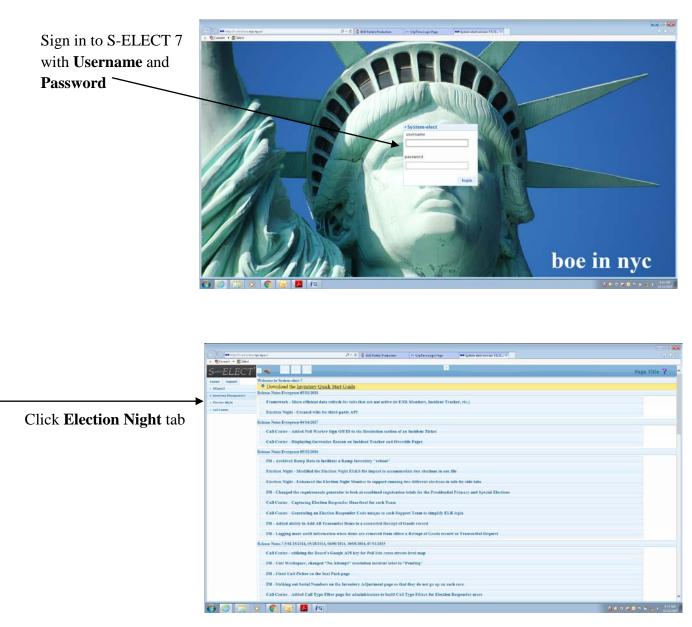
- 1. From the Desktop, double click the ESS Election Reporting Manager icon.
- 2. Election Reporting Manager Copyright is displayed.
- 3. Click OK.
- 4. Choose one of the following is displayed.
- 5. Choose a, b, or c based on the task completing:
  - a. If continuing an election, click Continue with the current Election.
    - i. Click OK.
  - b. If starting and zeroing an election, click Zero out ballots cast.
    - i. Click OK.
  - c. If changing an election, click Change to a different Election.
    - i. Click OK.
    - ii. Election File Directory is displayed.
    - iii. Click Election Name under Filename (i.e. 2016G1A1).
    - iv. Click OK.
    - v. Click **OK**.

Election Reporting Manager
Current Election Name: 11GANYCO
Total Ballots Cast: 0
Choose one of the following:
<ul> <li>Continue with the current Election</li> </ul>
<ul> <li>Zero out ballots cast</li> </ul>
C Change to a different Election
<u></u> K

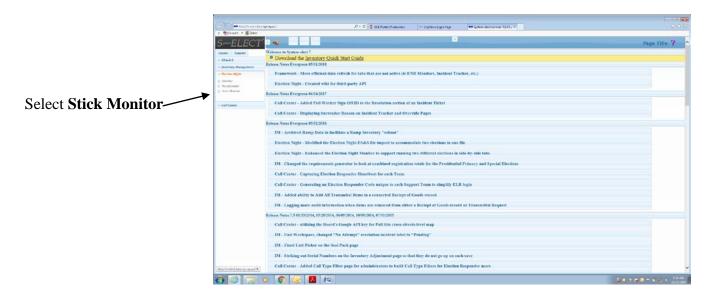
# **EARLY VOTING PMD READING IN S-ELECT 7**

At the close of the Early Voting poll sites for each election event, PMDs for the county are to be read into S-Elect 7 at their designated county BOE location.

Five dedicated Clients are used for the Early Voting PMD reading process. Leads will assign one of the Clients as a dedicated S-Elect 7 sign in workstation. The remaining four Clients are used for the Early Voting PMD reading. Each Client will be on a rolling cart for easy transport when not in use.



## **DEDICATED S-ELECT 7 SIGN-IN WORKSTATION**



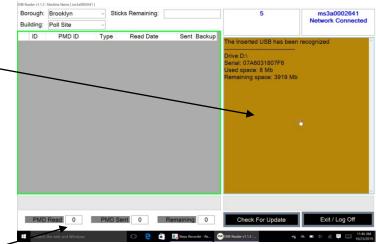
- When the Early Voting Polls close, the encrypted unofficial results on the PMDs will be read into tablets by Poll Site Coordinators. The tablets will transmit those encrypted unofficial election results to the SFTP servers at the General Office. The encrypted results will be unreadable until Election Night.
- Police Officers will transport the Early Voting Poll Site PMDs to the borough location.
- Bipartisan Leads will review the Stick Monitor screen continuously.
  - The screen will indicate the percentage of media read at each poll site.
  - Poll sites showing 100% indicate that all PMDs assigned to them have been fully read.
    - No further action is required for those poll sites.
  - PMDs for poll sites that show less than100% must be read into Election Night Results (ENR) until Stick Monitor displays 100%.
- Leads will assign PMD reading teams according to the amount of PMDs and poll sites that need to be read at the borough location.
- The maximum number of PMD reading teams should be four.
  - One team can read more than one poll site.
  - PMDs should be read as soon as they are received.
  - Do not wait until a full zone has been returned.
- As the borough locations receive precinct deliveries, bipartisan teams will remove the poll site PMDs from their bags (the media with less than 100%).
- Read those PMDs into the Election Night Results (ENR) app until Stick Monitor displays 100% for all Early Voting Poll Sites.

#### **READING PMDS ON THE CLIENTS**

- Double-click the ENR app
   Sign in with Username and Password
- Select the Borough
  Select Poll Site
  Make sure Network Connected appears in the upper right corner.
  - If the network is not connected, continue reading the PMDs.
  - If network is not connected after reading all PMDs, contact EVS System Administrator.

#### Insert the first PMD

- To process, wait for the colors to change from yellow, red, then green.
- When screen turns green, remove PMD and begin reading the next one.
- Follow the same process until all PMDs for poll sites with less than 100% are read.
- The screen will confirm the number of PMDs read. -



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ding:	Poll Site	~			6 seconds	Network Connected	d Buildir	ng: P	oll Site	~					Network Connect
ID	PMD ID	Туре	Read Date	Sent Backup	The inserted USB has been r			)	PMD ID	Туре	Read Date	Sent Backup	<b></b>		
							P 1	07	A6031807F6		10/23/2019 11:47:	08 🔳 🔳			
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### **Troubleshooting**

- If a PMD is pulled too soon and **Already Processed** displays:
  - Wait a few seconds to process it again.
  - This time, wait until the screen turns green before removing the PMD.

#### Orphaned Sticks

- PMDs read that are not tied to a poll site will display under Orphaned Sticks.
  - This occurs when poll site changes are not updated in the EMS.
- Read all of the EV PMDs for that poll site.
  - If Stick Monitor shows 0% for the poll site, click on **Orphaned Sticks**.
  - Confirm that the same number of PMDs for the missing poll site appears in Orphaned Sticks. Then move on to the next poll site.
- See Sample Stick Monitor Results screen image indicating Orphaned Sticks [pg36].

#### Note:

- The purpose of reading PMDs at the borough is to obtain the complete poll site upload (100%).
- PMDs already processed can be read multiple times on the ENR app.
  - The results will only change if there are updates (results not previously read at poll site).
  - This occurs if the PMD is pulled before all of the results have been uploaded.

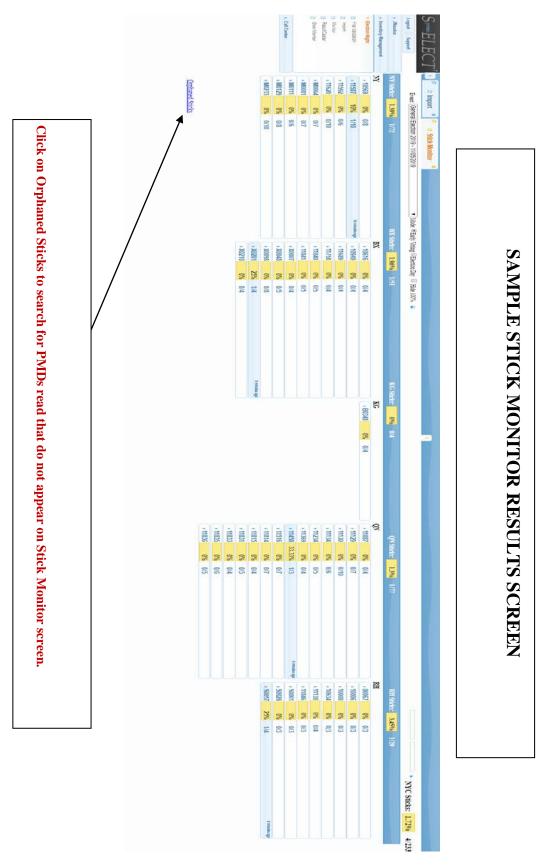
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enits	MN South Sticks: 0% /	BX Sticks: 0% /	BK South Sticks:	0% /	QN South Sticks:	015 /	SI Sticks: 0% /	
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tion Night	Orphaned Sticka							
nitur ult/Casser								
3. Meaning								
Center								

- After achieving 100% for all Early Voting poll sites, place the PMDs back into their bags.
- Logoff and shutdown the Clients.
- Move all election materials into secured storage.
- Early Voting VMF Election Night may officially end.

**Starting at 9pm on Election Night**, Election Reporting Manager (ERM) servers at the General Office will read and decrypt the unofficial Early Voting and Election Day results from the SFTP servers. **At this point**, **the results from Early Voting and Election Day will be made public.** 

In periodic intervals during Election Night, the unofficial results will be transferred electronically to the Board's website, the State Board of Elections, the Board's S-Elect system, and to the media.

## SAMPLE STICK MONITOR RESULTS SCREEN



# **PROCESSING ELECTION RESULTS**

#### READ A DS850 RESULTS PMD

- 1. On the Menu bar, click **Tabulators**.
- 2. On the dropdown list, click **DS850**.
- 3. On the dropdown list, click Process DS850 Memory Device.
- 4. If Enter Qualification Code message appears, enter the Qualification Code.
  - a. Click **OK**.
- 5. If Select Current Group to be Updated window appears,
  - a. Click the row with (850).
  - b. Click **OK**.
- 6. Process DS850 Memory Device is displayed.
  - a. Click Read Media, Update Results and Archive Data.
  - b. If the button that includes "Archive Data" is not selected, ballot images cannot be viewed.
  - c. Click **OK**.
- 7. Process DS850 Memory Device is displayed.
  - a. Make sure **Dynamic Precinct Reports** is not selected. This applies to all ballot kinds.

Process DS200 Memory Device	×
Dynamic Precinct Reports	
🛛 All Precincts 🔹 🔍 Key Preci	ncts
Skip Precincts with Zero Ballots Cast	
<u> </u>	1

- b. Election Day ballots only: Skip Precincts with Zero Ballots Cast is not selected.
- c. Click **OK**.
- 8. Process DS850 Memory Device is displayed.
  - a. Insert PMD with exported results from the scanner into USB port.
  - b. Click **OK** to start reading the PMD.
  - c. Wait for red light on the PMD to stop blinking.
  - d. Remove the PMD from the USB port.
  - e. Repeat steps A thru D until all PMDs are read.
- 9. Click **Cancel** to exit window.

# UPDATE ELECTION RESULTS MANUALLY IN ERM

As of 2016, manual updates to Election Results is done in S-Elect. However, these are the steps to making updates in ERM:

- 1. On the menu bar, click **Update**.
- 2. On the dropdown list, click **Update Election Results Manually**.
- 3. **Update Election Results Manually** is displayed.
  - a. Select **DS850**.
  - b. Click **OK**.
- 4. **Update Election Results Manually** is displayed.
  - a. Click **Precinct**.
  - b. Name of Precincts is displayed.
    - i. Click the **AD/ED**.
    - ii. Click **OK**.
  - c. Click OK.
- 5. If a window with the message: **Change** (+ **or** -) is displayed.
  - a. Click **Change** (+ or -).
  - b. Click OK.
- 6. **Update Election Results Manually** is displayed.
  - a. For the **Ballots Cast Total**, enter the number of ballots to be added.
  - b. Find contest/candidate by using the Next Page or Prev Page button.
  - c. Enter the number of votes in the text box next to the candidate name.
  - d. Click Update All.
- 7. Repeat steps 4, 5, and 6 until all AD/ED updates are completed.
- 8. When all data for all EDs has been entered, click **Cancel**.
- 9. Click **Cancel** to exit window.

Update Election Results Manually		
(Updating Election Day) Precinct number: 0001 PRE	CINCT 1	
BALLOTS CAST BALLOTS CAST BALLOTS CAST BALLOTS CAST	TOTAL	<u>100</u> 100
BALLOIS CAST REP-UNITED STATES SENATOR	JACK SHEPHARD JOHN LOCKE JAMES FORD KATE AUSTEN ROSE HENDERSON HUGO REYES UNDER VOTES UNDER VOTES	100 25 25
REP-REP STATE EXEC COMM 1	JAMES T. KIRK	150
Next Page Brev Page	Update All Upd. Reg Vatere Cancel	

## **PRODUCING REPORTS**

#### SET UP REPORTING OPTIONS FOR AN ELECTION REPORT IN ERM

- 1. On the menu bar, click **Reports**.
- 2. On the dropdown list, click **Election**.
- 3. On the dropdown list, click **Summary**.
- 4. **Print Election Summary** displays.
  - a. Click the **Options** tab.
    - i. Click Include over/under reporting?

This ensures overvotes and undervotes are tracked.

- ii. Click Include time/date stamp?
- iii. Click Include page number?
- iv. Click Include precincts reported line?
- b. Click Apply.
- c. Click Cancel.

Selection Headings Options R	eporting Group Print Which Groups
Include over/under reporting? Include time/date stamp? Include page number?	Percentages: Cand & based on votes cast-No ov/un & Number of copies: 0
<ul> <li>Include precincts reported line?</li> <li>Print totals only (no detail)?</li> <li>Summarize absentee precincts</li> </ul>	Precinct terminology PRECINCTS
<ul> <li>Use seq. page numbering?</li> <li>Separate reports by party?</li> <li>Always use R/V totals?</li> </ul>	Pri cert?(Y=Next pg/S=same pg): N(none) Print multiple conts on same pg?
<ul> <li>Print contest totals?</li> <li>Print candidates in vote seq.?</li> <li>Print 1up format?</li> <li>Exclude local contests?</li> </ul>	Print multiple copies in what seq.? N (cone)
Reset Us	e For This Run Only Apply

## SET UP REPORTING OPTIONS FOR A **PRECINCT REPORT** IN ERM

- 1. On the Menu bar, click **Reports**.
- 2. On the dropdown list, click **Precinct**.
- 3. On the dropdown list, click **Summary**.
- 4. **Print Precinct Report** is displayed.
  - a. Click the **Options** tab.
    - i. Click Include over/under reporting?
    - ii. Click Include time/date stamp?
    - iii. Click Include page number?
  - b. Click Apply.
  - c. Click Cancel.

## PRINT AN ELECTION SUMMARY REPORT

- 1. On the menu bar, click **Reports**.
- 2. On the menu bar, click **Election**.
- 3. On the Menu bar, click **Summary**.
- 4. **Print Election Summary** displays.
  - a. Under Output Destination, click Printer to ensure printer is selected.
  - b. Click **Apply**.
  - c. Click **OK** to print a Summary Report.
- 5. **Listing is complete!** displays.
- 6. Click **OK**.

Print Election Summary	
Selection Headings Options Reporting	Group Print Which Groups
C All	
C Contest/Precinct	
Contest:	Contests
Precincts:	Precincts
• File 🗸	New
	Output Destination
Preceded by a statistics canvass	⊖ Disk ● Printer
<ul> <li>With statistics printed as contests</li> <li>Without statistics</li> </ul>	<ul> <li>Printer</li> <li>Internet</li> </ul>
	Apply
	<u>Q</u> K <u>C</u> ancel

## PRINT AN ELECTION PRECINCT REPORT

- 1. On the menu bar, click **Reports**.
- 2. On the dropdown, click **Precinct**.
- 3. On the dropdown, click **Summary**.
- 4. **Print Precinct Report** displays.
  - a. Click **Contest/Precinct**.
  - b. Click **Precincts**.
  - c. Name Precincts displays.
    - i. Click **AD/ED**.
    - ii. Click **OK**.
  - d. Under Output Destination, click Printer.
  - e. Click **OK** to print ED Report.
- 5. **List is complete!** displays.
- 6. Click **OK**.

# **EXPORTING ELECTION RESULTS IN ERM**

## **CREATE ELECTION SUMMARY REPORTING**

- 1. Open the current election. On the menu bar, click **Reports**.
- 2. On the dropdown list, click **Election**.
- 3. On the dropdown list, click **Summary**.
- 4. **Print Election Summary** is displayed.
  - a. Under **Output Destination**, click **Disk**.
  - b. Click **OK** to print the Summary Report.
- 5. **Listing is complete!** is displayed.
- 6. Click **OK**.
- 7. **Report File Utility** is displayed.
- 8. Click **Cancel**.

## **CREATE AN XML FILE**

- 1. On the menu bar, click **State Transfer**.
- 2. On the dropdown list, click **Create Results XML File**.
- 3. Create Results XML File is displayed.
  - a. Click Run the XML Create Program Final Results.
  - b. Click OK.
- 4. **Results XML file build is complete** is displayed.
- 5. Click **OK**.

Create Results XML File
Results XML file build is complete.
C:\ELECDATA\ANYGENER\ANYGENER_Results.XML

#### **COPY FILE**

Go to the **elecdata** folder in Windows Explorer to copy the following files to a blank PMD:

- a. :\elecdata\xxxxxx\EL45.LST

#### **ELECTION NAMING CONVENTION:**

For each Election, include the year, Election Type, County ID and ballot kind in the file name.

Election Year	Election Type	<u>County ID</u>
2017	G – General	1 – New York
	P – Primary	2 – Bronx
	O – Run-off	3 – Kings
	A – Presidential Primary	4 – Queens
	S, 1 to 9 – Specials	5 – Richmond

## **ACQUIRE – ELECTIONWARE RESULTS**

## ELECTION DAY NAVIGATOR FOLDER TREE

#### After all DS200 & DS850 PMDs have been read into ERM using the Read Media, Update Results and Archive Data button to process them, print a Summary Report and exit ERM.

#### **Open Electionware**.

Make sure Electionware is closed on all other machines and Clerks have read all the media in ERM.

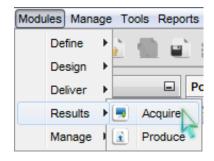
Confirm you are in the CURRENT election.

On menu bar, click **Modules**  $\rightarrow$  **Results**  $\rightarrow$  **Acquire**.

Then click  $\rightarrow$  Load Results.

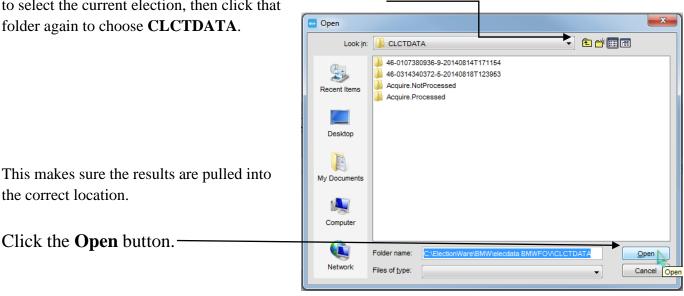
the correct location.

Click the **Open** button.-



#### In the **Open** window, click the folder tab with arrow facing up

to select the current election, then click that folder again to choose CLCTDATA.



The path to the specified CLCTDATA folder appears in the **Results Repository field**, and the **Start Load** button is enabled.

	.E2\CLCTDATA					Browse
Results Received						
Poll Place	Media ID	Device Type	Media Serial Number	First Ballot	Progress	Status
Absentee		1	07B916631536	Fri Jul 25 11:08:33 CDT	100 %	Completed
bsentee		1	07B716131539	Fri Jul 25 11:08:33 CDT	100 %	Completed
bsentee	D5200	1	07B916131595	Fri Jul 25 11:08:33 CDT	100 %	Completed
			Start Load	Stop Load		

You'll see the import of election results within the **Progress column** of the Load Results tab.

When the import is finished, you'll see **Completed** in the **Status column** for all media read.

When all media is in <b>Completed</b> status:	Status 8 Load Re Load Results Data Results Repository	sults 8 Election day	- Table View 8		
✓ Click Stop Load.	Results Received				Browse
<ul> <li>Check for any errors in the Error Status Panel shown below the Stop Load button.</li> </ul>	Pol Pace	Device Type	Media ID	Media Serai Number First Batot	Progress Status
	Error Status Panel Poll Place	Device Type	Media ID	Media Serial Number	First Ballot Error
				Clear	
	•			m	

#### Now that the results have been loaded through the Acquire function in Electionware:

- Click the plus [+] symbol to the left of the Poll Place.
- Click the plus [+] symbol to the left of the globe.
  - Multicolored circle
  - o Shows DS200 & DS850 media



- Search for PMDs that **did not read** into the system.
  - o Gray flag symbol



- Green checkmarks display for media read successfully.
  - o Green checkmark symbol



Poll Place List	40	Status
🗢 🛍 🛍 🕀 🖂		Find:
O Poll Place		
🖶 🔲 Election day		Poll P
🗄 📀 POLL 1		POLL
🛄 DS850 Media-1		POLL
DS200 Media-1		POLL
		POLL
DS200 Media-3		POLL
DS850 Media-3		POLL
DS200 Media-4		POLL
DS850 Media-4		
DS200 Media-5		POLL
D Poll Place: POLL 1		-
D Media ID: Media-5		-
<u>D</u> Device Type: DS200		
Status: Loaded Created: 2014-08-12 09:39:02.917		-
Absentee		
Number of Sheets: 14		
Machine Serial: 0314340372		
Media Serial Number: AA0401270000	9542	
Loaded Media Time: Tue Sep 16 15:3	4:14 CD	T 2014
Closed: Tue Aug 19 09:28:22 CDT		
First Ballot: Mon Aug 18 12:39:53 C		
Last Ballot: Tue Aug 19 09:28:00 CI	DT 2014	

## **PRODUCE – ELECTIONWARE**

### **ELECTION DAY WRITE-INS**

#### **Assumptions:**

- All DS200 and DS850 PMDs have been read into ERM
   using Read Media, Update Results and Archive Data button
- The results have been loaded (Acquire) into Electionware
- 1. Open Electionware

Make sure Electionware is closed on all other machines.

- 2. Confirm you are in the CURRENT election.
- 3. On menu bar, click **Modules**  $\rightarrow$  **Results**  $\rightarrow$  **Produce**.
- Modules Manage Tools Reports
  Define
  Design
  Deliver
  Results
  Acquire
  Manage
  Produce
- 4. Use the Filter List located to the left of the Status tab.

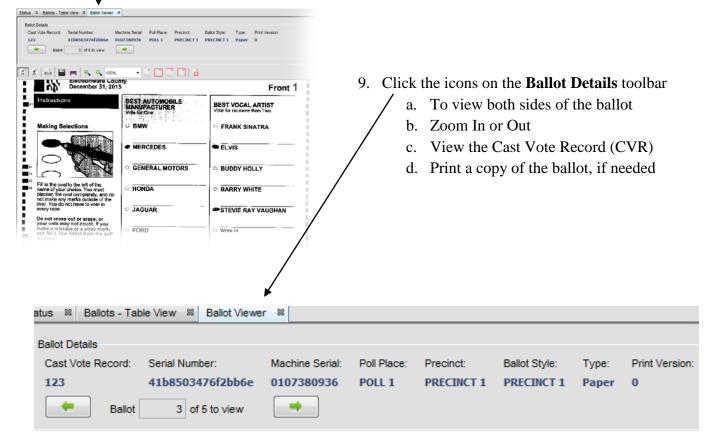
Filter List	40		
Precinct		<b>Precinct</b> = All	
Al	•	<b>Poll Place</b> = [M0	028, B0033, X0055, Q0049, S0050] HASNO
Poll Place		Machine = All	
Al	- /	<b>Ballot Type</b> = $Pa$	-
Machine		<b>Write-in</b> = All W	Vrite-ins
All	- /	5. Click Apply	Filton
	-1/	/5. Click Apply	Filter
Ballot Type		a. All wr	ite-ins for poll site selected displays
All	- /	b. Listing	g appears in Ballot – Table View <u>ta</u> b
Write-in		Fater List d	Status II Balote - Table Vew II Find Find Tend Tend Tend Tend Tend Tend Tend Te
AI	<b>-</b>	0001 AD: 66 ED: 001	
h		Pol Para	Paper 11266 11266 AD 66 ED 0. 0001 Ballot Style 1 Valid 141349 0389464014. DS200-020.
Blank		[A]	Paper 11266 11266 AD 66 ED 00001 Ballot Style 1 Valid 141363 0cb3272844 DS200-020
Didlik		and the second sec	Paper 11256 11256 AD: 65 ED: 0 0001 Ballot Style 1 Valid 141354 0dblab84ff7 DS200 - 020
All		Machine	Paper         11255         11255         AD 65 ED 00001         Balkd Style 1         Valid         141356         01070a73648.         DS200 - 020.           Paper         11255         11255         AD 65 ED 00001         Balkd Style 1         Valid         141357         1122571788.         DS200 - 020.
			Paper 11255 11255 AD: 65 ED: 00001 Ballot Style 1 Valid 141358 132e8beede D5200 - 020
			Paper 11255 11255 AD: 65 ED: 00001 Balot Style 1 Vald 141362 2613ce61439DS200 - 020
Ballots Printed		Balot Type	Paper 11255 11255 AD: 65 ED: 00001 Ballot Style 1 Valid 141363 26613659586DS200 - 020
r		Al -	Paper 11256 11256 AD: 65 ED: 00001 Balkt Style 1 Valid 141366 292b9e8b14 DS200 - 020
All	-	Write-an	Paper 11256 11256 AD: 65 ED: 00001 Ballot Style 1 Valid 141367 2bde08a06e DS200 - 020
<u> </u>		A4	Paper 11255 11255 AD: 65 ED: 00001 Ballot Style 1 Valid 141368 21a2c5b49c305200 - 020
			Paper 11256 11255 AD: 65 ED: 00001 Baltot Style 1 Valid 141371 38ed989058 DS200 - 020
Ballot Exception		Blank	Paper 11256 11256 AD: 66 ED: 00001 Balot Style 1 Valid 141300 4f8da7dd206DS200 - 020 Paper 11256 11256 AD: 66 ED: 00001 Balot Style 1 Valid 141381 66f13ee60feDS200 - 020
[		A	Paper 11266 11266 AD 65 ED 0 0001 Batcl Style 1 Valid 141387 6b1182e6768. DS200 020.
Al	<b>•</b>	Ballots Printed	Paper 11256 11256 AD 66 ED 0. 0001 Ballot Style 1 Valid 141329 6bd:e92209. DS200-020.
		A	Paper 11255 11255 AD 65 ED 00001 Ballot Style 1 Valid 141393 5e7e05betidoDS200 - 020
		and the second sec	Paper 11255 11255 AD: 65 ED 0 0001 Ballot Style 1 Valid 141394 6203a6adaa DS200 - 020
		Ballot Exception	Paper 11255 11255 AD 65 ED 00001 Ballot Style 1 Valid 141397 68804co4e0DS200 - 020
Cast Vote Record			Paper 11255 11255 AD 65 ED 00001 Ballot Style 1 Valid 141400 7516510cc219D5200 - 020
		C	Paper 11255 11255 AD: 65 ED: 0001 Ballet Style 1 Valid 141403 76962268tc0eD5200 - 020 Paper 11255 11255 AD: 65 ED: 00001 Ballet Style 1 Valid 141410 Seeb7c8963D5200 - 020
		Cast Vote Record	Paper 11255 11255 AD: 65 ED: 00001 Ballot Style 1 Valid 141410 8000/2006.505200 - 020
Apply Filter Reset		Apply Filter Reset	[Output-Ferents Servers however, increases "optimation through or user; manage of the server however, increases of the server howeve
		< III.	b 05/04/2016 12:46:20DM 11740004 New results filter applied: Precinct - All, Foll Place - All, Machine - All,
		90 items Displayed	05/04/2016 12:47:36DM 11740004 New results filter applied: Precinct = 0001 AD: 65 ED: 001, Doll Place = All
34 Items Displayed		Filter	
		1000 B	
Filter			

- 6. Click the Highlight all butt
- 7. Right-click highlighted sect and select View All Ballots
- 8. The ballots appear in the Ballot Viewer tab
  - a. Image is not available displays if there is no in for a record.

		Status &	Ballots - Table V	hew %							
		Find:			Find Next	Find Previous	Highlight all	Match case			
		Туре	Poll Place	* Precinct	Precinct ID	Dallot Style Disp	position Cast	Serial Nu	Machine	Write-in 💌	Provision Prin
		Paper	POLL 1	PRECINCT 4	0001	PRECINCT Valid	d 119	0318dab804	. DS200 - 010	Marked	0
		Paper	POLE 1	PRECINCT 1	0001	PRECINCT Valid	d 105	056648a689	. DS200 - 031	Marked	0
		Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	106	0c8dc1ad8a	. DS200 - 031		0
ick 1	the Highlight all button	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid			. DS200 - 010		0
ICK	ine mgingin an outton	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid			. DS200 - 010		0
		Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid			DS200 - 031		0
ght-	click highlighted section	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valic			. DS200 - 031		0
0	0 0	Paper	POLL 1	PRECINCT 1 PRECINCT 1	0001	PRECINCT Valid		25a32fea304.			0
d se	lect View All Ballots	Paper Paper	POLL 1 POLL 1	PRECINCT 1 PRECINCT 1	0001	PRECINCT Valid	d 123 d 124		DS200 - 010 DS200 - 010		
		Paper	POLL 1	PRECINCT 1	View Ballo	t	d 124		DS200 - 010	Markad	0
o ha	llots appear in the	Paper	POLL 1	PRECINCT 1	View All B	allots	1 126		DS200 - 010		0
	allots appear in the	Paper	POLL 1	PRECINCT 1	Print Ballo	t (Official)	1 127		DS200 - 010		0
allot	Viewer tab	Paper	POLL 1	PRECINCT 1	Print Ballo	t (Facsimile)	128	502e01b251	. DS200 - 010		0
1		Paper	POLL 1	PRECINCT 1	Print All Ba	allots (Official)	109	62015f81372	DS200 - 031		0
a.	Image is not available	Paper	POLL 1	PRECINCT 1	Print All Ba	allots (Facsimile)	d 129	6cce0aa231.	DS200 - 010.		0
	displays if there is no image	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	d 110	7137395da4	DS200 - 031		0
		Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	d 111	82a0eb49b7	. DS200 - 031		0
	for a record.	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	d 112	82fc5c88d1c.	DS200 - 031		0
		Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	d 113	8347211ca1	. DS200 - 031	Marked	0
b.	If Image is not available	Paper	POLL 1	PRECINCT 1	0001	PRECINCT Valid	d 130	8ed2b9f4920.	DS200 - 010		0

displays for all records, the Read Media, Update Results and Archive Data button was not selected when PMDs were read into ERM.

Statue Statue - Table View St



# **Cast Vote Record**

Repo	ort: CVR Report		
1	n 👷 🛨 👷 💷 🗋 🛄 🛀	•	100%
	Cast Vote Record: 130		
	Poll Place: POLL 1		
	Precinct: PRECINCT 1		
	Ballot Style: PRECINCT 1 [ Sheet Number 1 ]		
	Party: NONPARTISAN		
	Serial Number: 8ed2b9f492062fb0		
	Machine Serial: 0107380936		
	Blank Ballot: NO		
	Contests:		
	BEST AUTOMOBILE MANUFACTURER (9)		
	Vote For: 1		
	FORD (32)	Соц	nted
	BEST VOCAL ARTIST (12)		
	Vote For: 2		
	ELVIS (35)		nted
	Undervoted	Und	ervoted
	BEST ICE-CREAM FLAVOR (16)		
	Vote For: 1		
	CHOCOLATE (43)	Соц	nted
	PROPOSITION 1 (19)		
	Vote For: 1		
	Yes (20)	Соц	nted
	PROPOSITION 2 (23)		
	Vote For: 1		
	Yes (24)		rvoted
	No (25)	Ove	rvoted

## CREATE AN XML AND HTML FILE IN ELECTIONWARE

- 1. Open the current election. On Menu bar, click **Modules**.
- 2. On the dropdown list, click **Results**.
- 3. On the dropdown list, click Acquire.
- 4. The **Status** screen opens.
- 5. Select the **Load Results** tab.
  - a. If the tab is not open, right-click **Poll Places** then select **Load Results**.
- 6. Click the **Browse** button.
  - a. Find the folder containing the Election Results Files.
  - b. Folder should read: \_:\electata\<Election Name>\CLCTDATA.
- 7. Click **Open**.
- 8. Click **Start Load** to load the results data. (It may take a few minutes.)
- 9. The **Progress** column of the Load Results tab will show the election results import progress percentage. Wait for it to reach **100%** for each import.
- 10 When the word **Completed** displays in the Status column for each Media ID inserted, click **Stop Load**. See screen image below.
  - a. If a problem occurs, write down the description of the error and contact the System Administrator immediately.

elecdata\EXAMPL	E2\CLCTDATA					Brow
esults Received Poll Place	Media ID	Device Type	Media Serial Number	First Ballot	Progress	Status
bsentee		1	07B916631536	Fri Jul 25 11:08:33 CDT	100 %	Completed
bsentee		1	07B716131539	Fri Jul 25 11:08:33 CDT	100 %	Completed
bsentee	DS200	1	07B916131595	Fri Jul 25 11:08:33 CDT	100 %	Completed

Modules	Mana	ge	То	ols F	Report	5
De	efine	Þ				
D	esign	Þ	_			_
D	eliver	Ł		_	<b>-</b>	Po
R	esults	Þ		Acq	uire	
M	anage	1	ì	Proc	luce	Ĩ

- 11. After the results have been loaded, go to **Modules**.
- 12. Click **Results**.
- 13. Click **Produce** to generate the results that were just acquired.
- 14. The Produce **Status** screen displays.
- 15. Click the **Reports** tab to generate **Results Reports**.
  - a. This will generate the **Election Results Summary Report** which can be viewed and saved in XML and HTML formats. The report contains the results of all loaded ballots and a breakdown by ballot kind.
  - b. Sample Election Results Summary Report on following page.

Modules Manage Tools Reports
Define
Design
Deliver
Po
Results
Acquire
Manage
Produce

Repo	rts	Window	Help
	Re	sults Rep	ort
	Do	uble Vote	Report

**NOTE:** If any ballots are in the "Not Assigned" category, there are ballots that should not have been scanned. Contact the System Administrator immediately.

16. To display the XML version of the report, click **Show XML** at the bottom of the screen.

- 17. The button name will change to **Show Report**.
  - a. Sample XML report on following page.
- 18. Save the report as a file by clicking **Save** at the bottom of the screen.
- 19. Browse to the target folder.
- 20. Name the file using the Election Naming Convention: Election year, Type, and County IDa. Sample file name: (2017P4). See Election Naming Convention table below.
- 21. Click Save.
- 22. To display the HTML version of the report, click **Show HTML** at the bottom of the screen.
- 23. The button name will change to **Show Report**.
- 24. Save the report as a file by clicking **Save** at the bottom of the screen.
- 25. Browse to the target folder. Name the file using the Election Naming Convention shown below
  - a. The XML and HTML files will have the same name, but different extensions (.xml and .html).

#### **ELECTION NAMING CONVENTION:**

For each Election, include the year, Election Type, County ID and ballot kind in the file name.

<b>Election Year</b>	Election Type	County ID
2019	G – General	1 – New York
	P – Primary	2 - Bronx
	O – Run-off	3 – Kings
	A – Presidential Primary	4 – Queens
	S, 1 to 9 – Specials	5 – Richmond

us × Ballots - Table View × Results Report ×						
2016 General Richmond V1 Unofficial Results Election Results - Summary Report						
Statistics - Ballot Reporting						
Reporting Tag	Ballots	Ballots%	Bar Graph			
Presidential	46	15.54%				
Affidavit	56	18.92%				
Federal	56	18.92%				
Absentee	138	46.62%	(daning)			
Not Assigned	0	0.00%				
	Total: 296					
Electors for President and Vice President of t	he United States		-			
Times Over Voted	83		CALLER IN COLUMN			
Times Under Voted	23					
Candidate	Votes	Vote%	Bar Graph			
HILLARY CLINTON TIM KAINE	2	1.22%				
DONALD J. TRUMP MICHAEL R. PENCE	7	4.27%				
DONALD J. TRUMP MICHAEL R. PENCE	10	6.10%				
JILL STEIN AJAMU BARAKA	14	8.54%				
HILLARY CLINTON TIM KAINE	19	11.59%				
GARY JOHNSON BILL WELD	21	12.8%	1			
HILLARY CLINTON TIM KAINE	20	12.20%				
GARY JOHNSON BILL WELD	28	17.07%				
	43	26.22%				

## [HTML] ELECTION RESULTS – SUMMARY REPORT

<Owner id="0" name="ERM Results XML File version 2.1"> <ReportTime>2015-08-09T10:57:12.986-07:00</ReportTime> <PartyMap> <Party id="1" abbrv="NON" name="NONPARTISAN" partyBallotsCast="7" /> <Party id="5" abbrv="DEM" name="Democratic" partyBallotsCast="4" /> <Party id="6" abbrv="REP" name="Republican" partyBallotsCast="4" /> </PartyMap> - <ReportingTagList> <ReportingTag id="1" abbrv="ELD" name="Election Day" order="1" altid1="" altid2="16" tagBallotsCast="9" /> <ReportingTag id="2" abbrv="ABS" name="Absentee" order="2" altid1="" altid2="3" tagBallotsCast="6" /> </ReportingTagList> - <JurisdictionMap totalJurisdictions="1" reportingJurisdictions="1" percentReported="0.0"> - <Jurisdiction id="0" title="Jurisdiction Wide" typeId="2" totalBallotsCast="15" totalRegistration="0" totalCastPercentage="0.0"</p> reportedRegistration="0" reportedPercentage="0.0" totalPrecincts="3" precinctsReported="0" precinctsReportedPercentage="0.0"> <Bstyle id="685" refReportingTagId="1" refPtyId="1" name="NON Ballot Style" typeSeqSplit="01-0001-01" useForVoterCount="true" /> <Bstyle id="686" refReportingTagId="1" refPtyId="5" name="DEM Ballot Style" typeSeqSplit="01-0002-01" useForVoterCount="true" /> <Bstyle id="687" refReportingTagId="1" refPtyId="6" name="REP Ballot Style" typeSeqSplit="01-0003-01" useForVoterCount="true" /> <Bstyle id="688" refReportingTagId="2" refPtyId="1" name="ABS NON Ballot Style" typeSeqSplit="02-0001-01" useForVoterCount="true" / <BStyle id="689" refReportingTagId="2" refPtyId="5" name="ABS DEM Ballot Style" typeSeqSplit="02-0002-01" useForVoterCount="true" /> <BStyle id="690" refReportingTagId="2" refPtyId="6" name="ABS REP Ballot Style" typeSeqSplit="02-0003-01" useForVoterCount="true" /> - <Precinct id="0001" ballotsCast="5" castPercentage="0.0" counted="true" regVoters="0" name="Precinct 1"> <PrecinctParty partyId="1" regVoters="0" ballotsCast="2" castPercentage="0.0" refBStyleId="685" blanksCast="0" />
<PrecinctParty partyId="5" regVoters="0" ballotsCast="2" castPercentage="0.0" refBStyleId="686" blanksCast="0" /> <PrecinctParty partyId="6" regVoters="0" ballotsCast="1" castPercentage="0.0" refBStyleId="687" blanksCast="0" /> </Precinct> - <Precinct id="0002" ballotsCast="4" castPercentage="0.0" counted="true" regVoters="0" name="Precinct 2"> <PrecinctParty partyId="1" regVoters="0" ballotsCast="2" castPercentage="0.0" refBStyleId="685" blanksCast="0" /> <PrecinctParty partyId="5" regVoters="0" ballotsCast="1" castPercentage="0.0" refBStyleId="686" blanksCast="0" /> <PrecinctParty partyId="6" regVoters="0" ballotsCast="1" castPercentage="0.0" refBStyleId="687" blanksCast="0" /> </Precinct> - <Precinct id="0003" ballotsCast="6" castPercentage="0.0" counted="true" regVoters="0" name="ABSENTEE"> <PrecinctParty partyId="1" regVoters="0" ballotsCast="3" castPercentage="0.0" refBStyleId="688" blanksCast="0" />
<PrecinctParty partyId="5" regVoters="0" ballotsCast="1" castPercentage="0.0" refBStyleId="689" blanksCast="0" /> <PrecinctParty partyId="6" regVoters="0" ballotsCast="2" castPercentage="0.0" refBStyleId="690" blanksCast="0" /> </Precinct> </Jurisdiction> </JurisdictionMap> - <Election id="1001" electionName="PRIMARY" electionTitle="PRIMARY" final="false" totalBallotsCast="15" totalRegistration="0" totalCastPercentage="0.0" reportedRegistration="0" reportedPercentage="0.0" totalPrecincts="3" precinctsReported="0" precinctsReportedPercentage="0.0"> - <ContestList> - <Contest id="400" altId2="102" partyId="1" stateWide="true" title="SUPERVISO" typeCode="N" voteFor="1" runoff="false" ballotsCast="7" castPercentage="0.0" writeinVotes="0" overVotes="0" underVotes="0">
- <Candidate id="447" pos="1" name="Kevin Powell" partyId="1" winner="false" runoff="false" recount="false">
<Votes refPrecinctId="0001" refBStyleId="685">1</Votes>

<Votes refPrecinctId="0002" refBStyleId="685">1</Votes> <Votes refPrecinctId="0003" refBStyleId="688">0</Votes>

<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>

#### XML REPORT