

Hart Intercivic: Exporting Guide for AuditEngine

Ray Lutz, Citizens Oversight V2 2022-06-15
support@citizenoversight.org

If you are requesting these from an election department, you can use the following public records request, sometimes called FOIA requests:

=====

NAME, TITLE
COUNTY County
ADDRESS
CITY STATE ZIP
PHONE
EMAIL

RE: **PUBLIC RECORDS REQUEST OF ELECTION DATA**

Dear NAME, TITLE:

Please reply promptly to this email to acknowledge receipt of this **PUBLIC RECORDS REQUEST**.

For the DATE (type, General, Special, Runoff, etc) Election:

BALLOT STYLE MASTERS: Please provide the Ballot Style Masters, in searchable PDF format, including the style barcodes, for this election. These files are probably already produced for this election and should be archived with the other data you must preserve. However, if you cannot find it, please see this document for instructions, which are specific for Hart Intercivic "Veritas" election management system.

<https://docs.google.com/document/d/1b16TXTZIUhbuvT-TXNU3-whLxDis0y77H1IKv1MdEuo/edit?usp=sharing> .

1. EXPORTING BALLOT IMAGES

These instructions are from the following document and are believed to be accurate, but the Hart Intercivic software suite may differ from their documentation. Since we do not have a copy of this software, we would appreciate any corrections to these instructions.

Verity Administrator's Guide: Central
(c) 2016 Hart InterCivic

https://sos.idaho.gov/elect/clerk/Hart/Verity2/6641-011%20A_Verity_2.X_Administrators%20Guide_Central.pdf

1 Select the **Review Images** menu and choose your desired filter(s).

Click [Clear Filters] to choose no filters (select all images).

2 Select the ballots you would like to export.

Select batches in the second column by clicking on the name and using either SHIFT-CLICK or CONTROL CLICK to add batches. Try to keep the number of batches in each group to less than about 50K.

The screenshot shows the VERITY Central 'Review Images' interface. The top navigation bar includes 'Home', 'Central', 'Select Election', 'Scan', 'Review', 'Write Ballots', and 'Reports'. The 'Review' tab is active. The left sidebar shows 'Review Images' and 'Write-in Candidates'. The main content area is titled 'Review Images' and 'Select the images you would like to review'. It features a 'Currently applied filters' section with 'Voter Intent Issues (1 item)' and a 'Batches available for review' list containing 'Batch #1 (1 ballots)', 'Batch #2 (2 ballots)', and 'Batch #3 (1 ballots)'. A red arrow labeled '1a' points to the 'Review' tab. A red arrow labeled '1b' points to the 'Clear Filters' button. A red arrow labeled '2' points to the batch list. A green circle with the number '3' highlights the 'Actions' menu, which is open and shows options: 'Review Ballot', 'Accept Ballots', 'Revert Ballots', 'Export Ballot(s)' (underlined), and 'Print List'. The bottom of the interface includes a 'Last Refreshed' timestamp, a 'Legend' with icons for 'Needs adjudication', 'Checked out', 'Contains locked contests', and 'Written to vDrive', and buttons for 'Clear Filters', 'Add Filter', and 'Refresh'.

- 3 Under the actions menu, select **Export Ballot(s)**.
Choose the location of the removable media where you would like to save the PDF file.

Choose a separate folder in the media for each group. These should be ZIPPED into archives for easy handling, with up to about 50K images per archive. Try to keep the archives about 5GB to 10GB if possible.

2. EXPORTING CAST VOTE RECORDS

These instructions are from the following document and are believed to be accurate, but the Hart Intercivic software suite may differ from their documentation. Since we do not have a copy of this software, we would appreciate any corrections to these instructions.

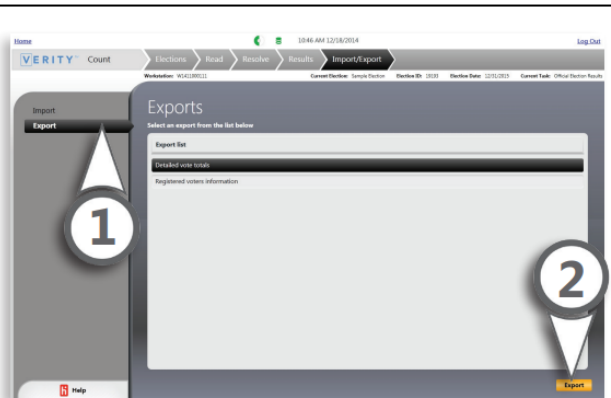
Verity Administrator's Guide: Count

(c) 2016 Hart InterCivic

https://sos.idaho.gov/elect/clerk/Hart/Verity2/6641-012%20A_Verity_2.X_Administrators%20Guide_Count.pdf

Page 192 "import/export -- exporting data from Count"

- 1 Select the **Export** menu. For a list of each available export with descriptions, see page 194.



- 2 Select the data to export, and then click **Export**.

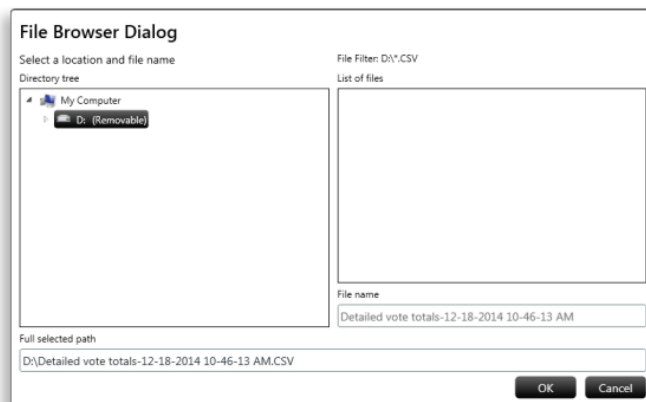
Choose "Detailed Vote Totals" which are defined here:

Detailed Vote Totals

This export provides a detailed view of results for each ballot option, certified write-in candidate, rejected write-in, and unassigned write-in. Results are grouped by precinct and then by contest. The following data is provided for each:

- Precinct or precinct split information:
 - Precinct or precinct split name
 - Precinct reporting status
 - Registered voters
 - Ballots cast
 - Turnout Percentage
- Contest information:
 - Contest
 - Contest party affiliation
 - Choice/Candidate name
 - Choice party affiliation
- Total votes
- Total Overvotes
- Total Undervotes
- Total Invalid Votes
- Votes (by voting type)
- Overvotes (by voting type)
- Undervotes (by voting type)
- Invalid Votes (by voting type)

3 Browse to the location where you would like the exported data to be saved, and then click **OK**. ▼



The vote totals will be exported using a .CSV extension with name like:
"Detailed vote totals-12-18-2014 10-46-13 AM.CSV"

3. CREATING BALLOT STYLE MASTERS

These instructions are from the following document and are believed to be accurate, but the Hart Intercivic software suite may differ from their documentation. Since we do not have a copy of this software, we would appreciate any corrections to these instructions.

Verity Administrator's Guide: Build

(c) 2016 Hart InterCivic

https://sos.idaho.gov/elect/clerk/Hart/Verity2/6641-010%20A_Verity_2.X_Administrators%20Guide_Build.pdf

=====

You will need to export ballots to PDF in the format suitable for printing by a third-party print vendor. This is detailed starting on page 118, which describes the "create" tab.



about printing

- ▶ When printing paper ballots from Verity Build:
 - Ballots can be printed on-demand and in-house
 - Ballots can be exported to PDF, and printed by a third-party print vendor who typically uses a commercial digital document printer.
- ▶ Hart has developed a print vendor certification process designed to standardize the various practices used by commercial print shops. If using a contract printer, be sure that they conform to the recommended guidelines.
- ▶ For jurisdictions using unique identifiers and/or ballot numbering on your printed ballots: If your jurisdiction orders printed ballots from Hart, and *also* intends to print ballots from your own Build workstation, you must coordinate your additional printing with Hart Ballot Production services to avoid the possibility of duplicate unique identifiers and/or ballot numbers on your printed ballots. For more information, please contact your Hart Ballot Production Specialist.



! IMPORTANT: All ballots, whether printed in-house or by a third party, must be checked using a Ballot QC Overlay. A Ballot QC Overlay is used to verify that the printing alignment is within the necessary tolerances so that the ballot can be scanned properly in the Verity system. For more information, see the Verity Knowledge Base article Ballot Printing Quality Assurance

Under the **Ballots** menu, you should select all the ballot styles. We believe this can be done by selecting the first style, and then going to the last style and shift-clicking on the last style. Also, using CONTROL-A to "select all" might work.

120

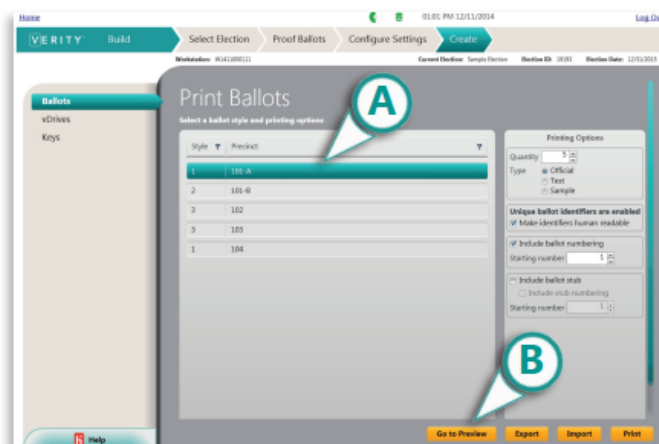
create

printing ballots

1 Under the **Ballots** menu, select the ballot style(s) you would like to print.

A) Ballot style is indicated in the left column; the associated precinct is in the right column.

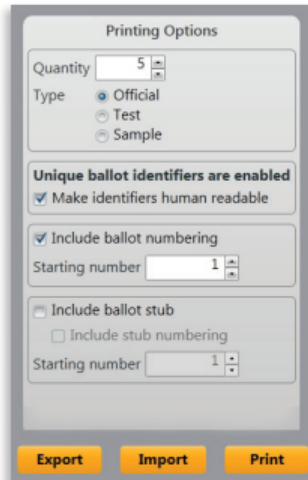
B) You can click **Go to Preview** to go to the Ballot Preview screen; click the **Create** tab to return to the Ballots menu.



printing ballots, *continued*

2 For each ballot style, select the Quantity and Type of ballots to be printed. Ballot types include Official ballots, Test ballots, and Sample ballots.

- ▶ **Test ballots** are typically for testing printer settings, checking ballot layout, and for use during a Logic & Accuracy Test (LAT).
- ▶ **Sample ballots** are intended as samples to be distributed to the public. Sample ballots cannot be read or counted by voting devices.
- ▶ **Official ballots** are for voting.



The image shows a 'Printing Options' dialog box. It has a 'Quantity' spinner set to 5. The 'Type' section has three radio buttons: 'Official' (selected), 'Test', and 'Sample'. Below this, there is a section 'Unique ballot identifiers are enabled' with a checked checkbox 'Make identifiers human readable'. Another checked checkbox is 'Include ballot numbering', with a 'Starting number' spinner set to 1. Below that is an unchecked checkbox 'Include ballot stub', which has a sub-option 'Include stub numbering' (also unchecked) and a 'Starting number' spinner set to 1. At the bottom are three buttons: 'Export', 'Import', and 'Print'.

Other Printing options include:

- Enabling human-readable unique identifiers for printed ballots.
- Including ballot numbering.
- Including ballot stubs.

On the right side of the screen is a dialog box which applies to each style. Please make the following selections:

- Quantity: 1
- Type: Official
- [] uncheck "Make identifiers human readable"
- [] uncheck "Include ballot numbering"
- [] uncheck "include ballot stub"

Then click "Export" and save to a PDF.

Please note: you should probably not use unique identifiers on ballots. This is set in preferences. See page 75. In Election Preferences:

UNCHECK "[] Make ballots unique with an identifier in the barcode", and save.

printing ballots, *continued***3** Print the selected ballot(s).

A) Click Print, or

B) If you wish to export the selected ballot(s) to PDF for printing at a later time, click Export.

4 (optional) Import a print queue (see the following page for instructions on creating a print queue file).

Printing Options

Quantity

Type ☒ Official ☐ Test ☐ Sample

Unique ballot identifiers are enabled
☒ Make identifiers human readable

☒ Include ballot numbering
 Starting number

☐ Include ballot stub
☐ Include stub numbering
 number

3B Export **3A** Print

PACKAGING AND SENDING THE DATA

Put all the masters in a folder and then zip it using conventional zip format. We recommend the free tool from 7-zip.org but please use .zip format and not .7z format.

We can send you an upload link to make sure the data gets into the right folder, just ask our support staff for the link if it is not in your cover letter. We now can create a single upload link for each county that is submitting data that will remain unchanged between elections.

For detailed instructions, please see this companion document, "Sending Election Data to Citizens' Oversight"

https://docs.google.com/document/d/1x_sgk_gcDka9ryzzEWnhKtdy2Z9CGnkzDWVU3r_fEpQ/e/dit?usp=sharing

END OF DOCUMENT