epulse

USER GUIDE v2.4

KNOWiNK | TOTALVOTE

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1.0 Getting Started and Account Settings

All Poll Pads are connected to ePulse in order to securely transfer voter check-in data via a WiFi or cellular network. Using ePulse, administrators can oversee the operation of individual precincts and Poll Pads, including the battery life of the devices, average check-in times, the number of ballots issued or spoiled, and contact poll workers via video or text message.

1.1 Getting Started

The following sections will prepare you to log in and use the system.

1.1.1 Browser Recommendations

ePulse can be used with any modern browser but is optimized for the following browsers:

- Chrome
- Safari
- Firefox

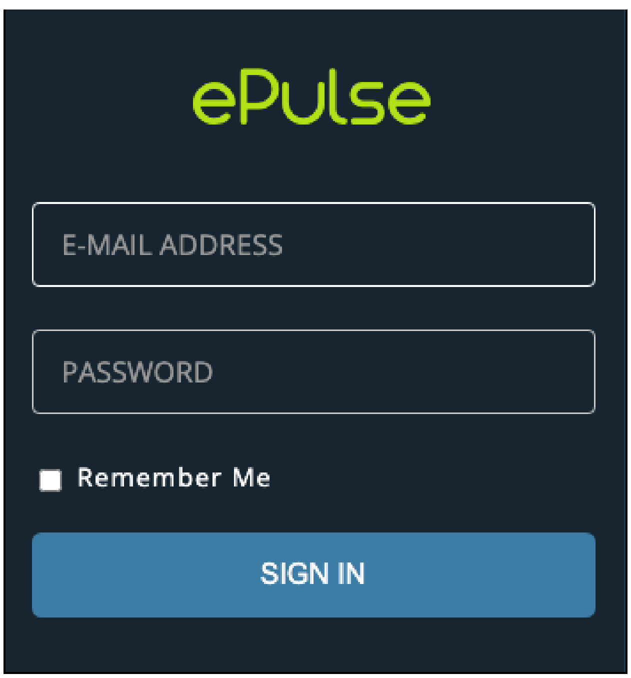
1.1.2 Logging into the ePulse System

ePulse can be accessed through a web browser on your desktop computer or any internet-enabled device. Users receive login credentials via email.

To log in to ePulse, follow these steps:

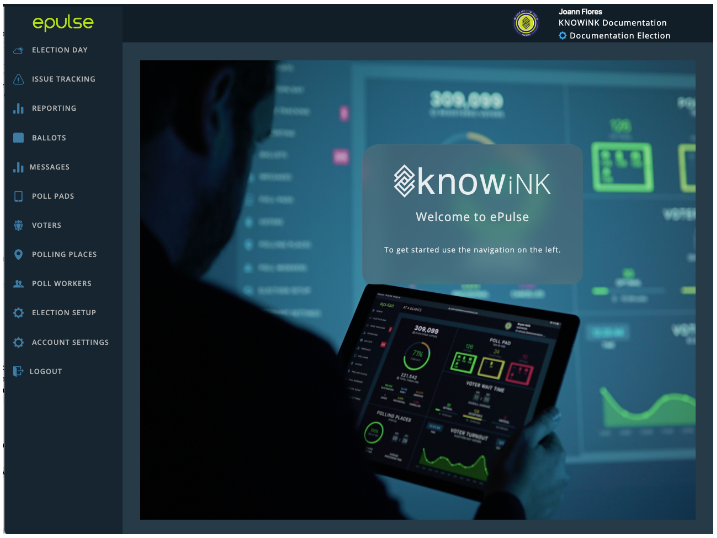
1. Navigate to the ePulse website from a web browser on an internet-connected computer.

The ePulse login screen is displayed.



2. Enter your login credentials in the *E-MAIL ADDRESS* and *PASSWORD* fields.
3. Click **SIGN IN**.

The *Welcome to ePulse* screen is displayed.

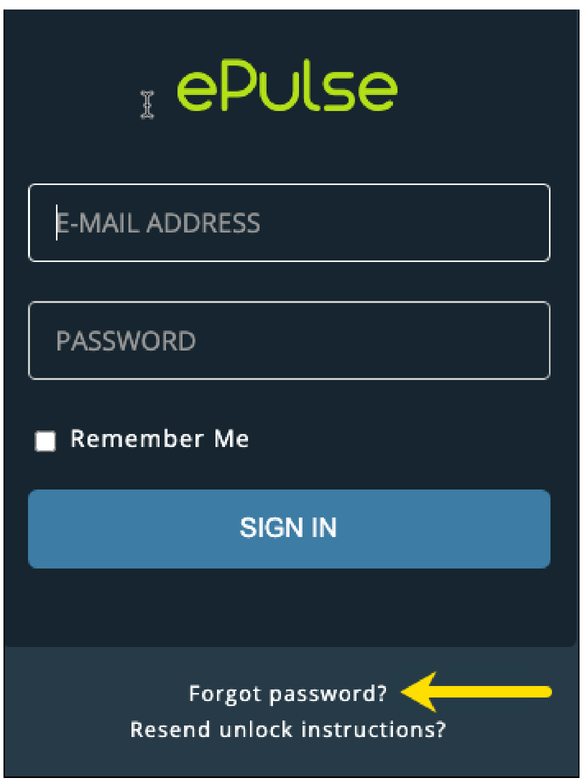


1.1.3 Resetting your ePulse Password

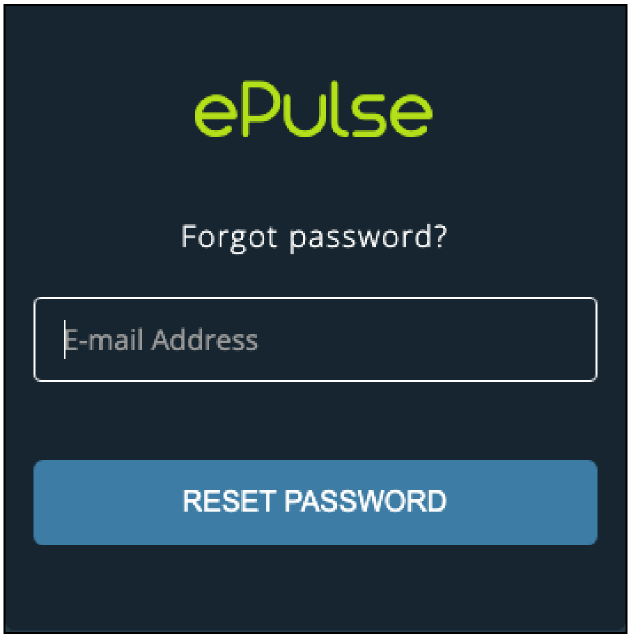
If you need to change your password, the system can send a reset link to the email address associated with your account.

To reset your password, follow these steps:

1. Click **Forgot Password** from the ePulse login screen.

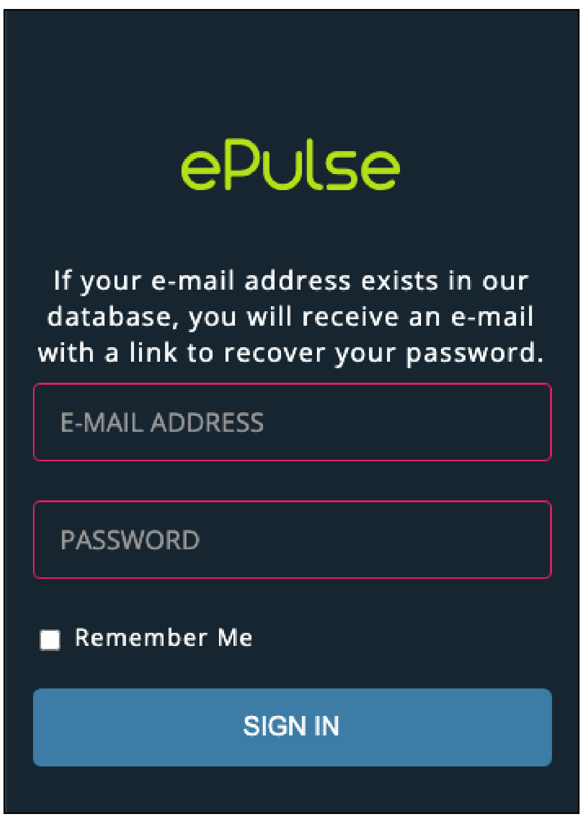


The *Forgot Password* screen appears.

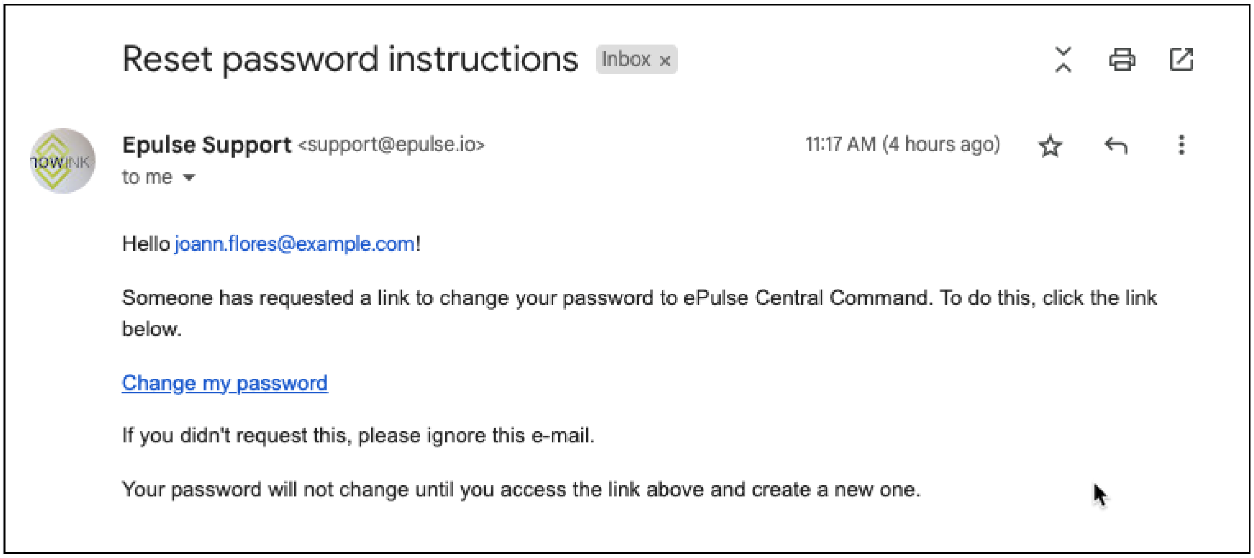


2. Enter your *E-mail Address*, and click **RESET PASSWORD**.

A confirmation message is displayed.

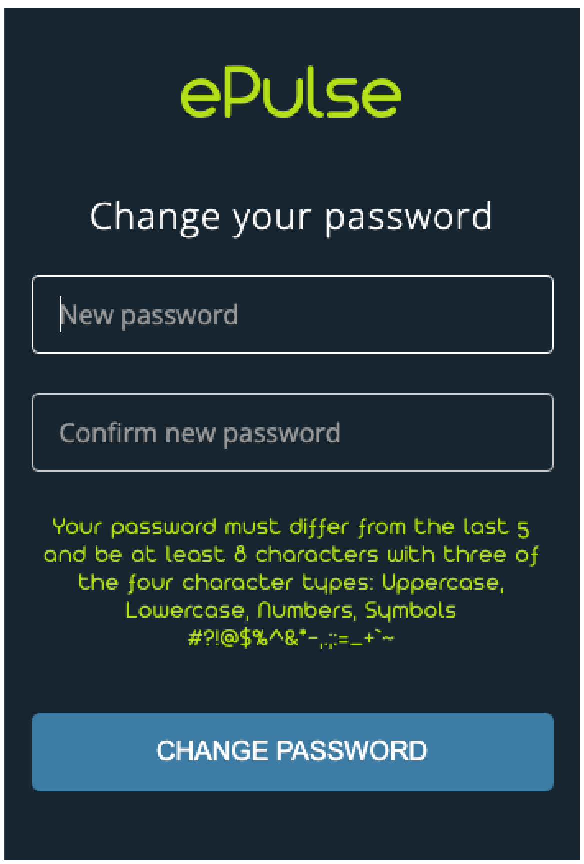


3. Check your email for the *Reset password instructions*.



4. Click the **Change my password** link in the email.

You are redirected to the *Change your password* screen in ePulse.



5. Type your chosen *New password*.
6. Type it again in the *Confirm new password* field.

7. Click **CHANGE PASSWORD**.

The ePulse login screen is displayed.

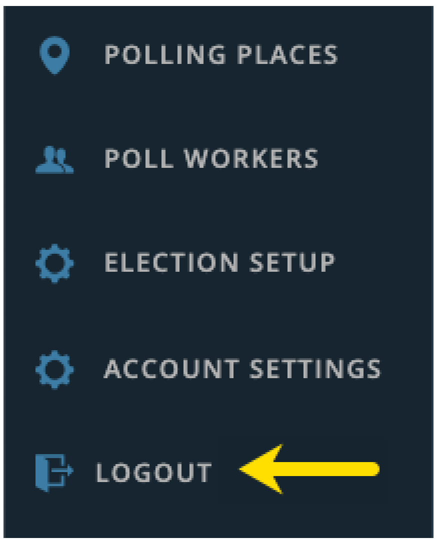
8. Enter your login credentials in the *E-MAIL ADDRESS* and *PASSWORD* fields.
9. Click **SIGN IN**.

The *Welcome to ePulse* screen is displayed.

Note: You will receive an email confirming the change with the subject: *Password Changed*

1.1.4 Logging out of the ePulse System

To log out of the system, click **LOGOUT** in the left navigation menu.



The system returns to the login page.

1.2 Account Settings

The *Account Settings* menu includes the following submenus:

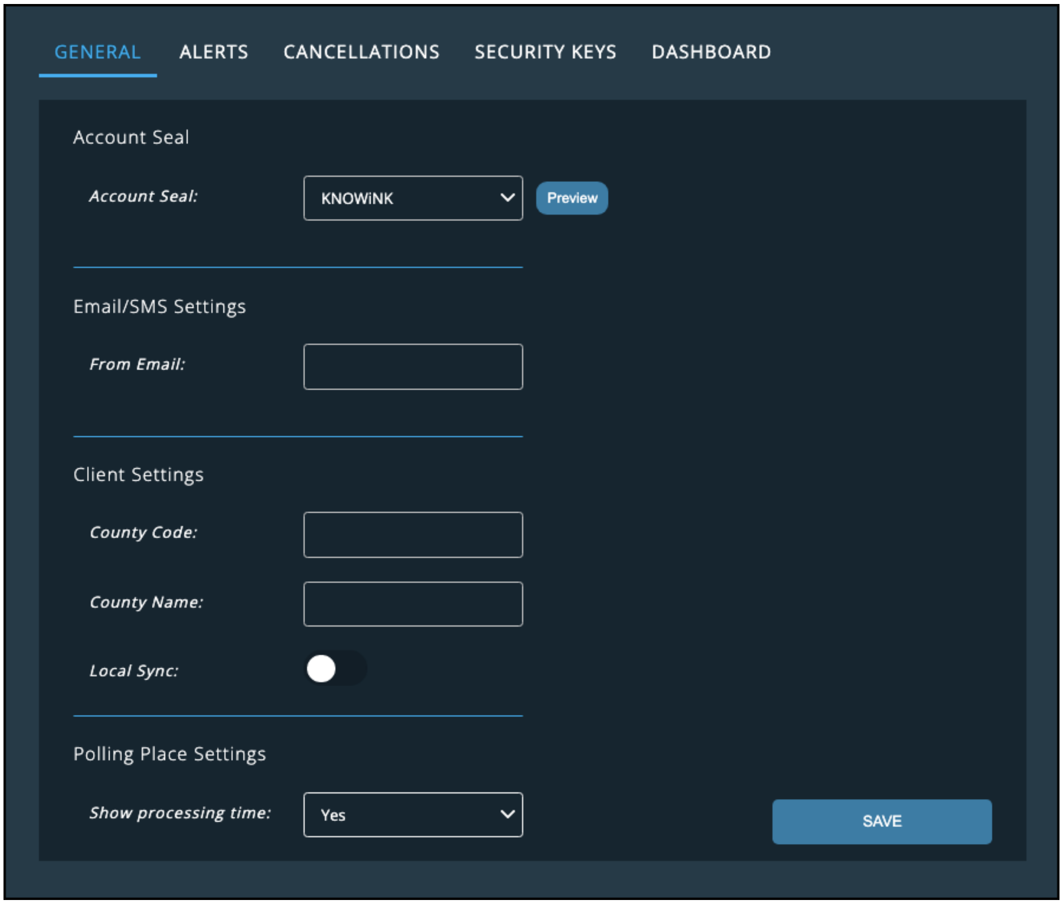
- General
  - Alerts
  - Cancellations
  - Security Keys
  - Dashboard
- Voter Import Settings
  - Status Mapping
- Poll Pad Setup
  - Printing
  - iSync
  - Voter QR Code
- Access the Help Menu
- ID methods
- Prompts
- Oaths
- Add/Edit Voter
- Users
- Restrictions
  - Account Restrictions
- Languages
  - Language Entries

1.2.1 General

To manage your *General* account settings, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **GENERAL**.

The *GENERAL* tab of *ACCOUNT SETTINGS* is displayed.



The following steps are optional and vary by jurisdiction.

2. Click to select from the *Account Seal* drop-down list.
    - Click **Preview** to view the seal you have selected.
3. Under the *Email/SMS Settings* heading, enter an email in the *From Email* field.
4. Under the *Client Settings* heading, enter the *County Code* and *Name* and use the toggle switch to turn *Local Sync* on or off.
5. Click to select **Yes** or **No** from the *Show processing time* drop-down list under *Polling Place Settings*.
6. Click **SAVE**.

The page reloads; if you have selected a seal, it appears in the main header.

1.2.1.1 Alerts

To manage settings for your Poll Pad Alerts, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **GENERAL**.

The *GENERAL* tab of *ACCOUNT SETTINGS* is displayed.

2. Click the **ALERTS** tab at the top of the *ACCOUNT SETTINGS* page.

The *Alerts* page is displayed.

3. Click in the fields to display a pair of arrows to adjust the numbers under any of the following categories:

   Poll Pad Alerts - Acceptable

   - Click to display a pair of arrows to adjust the numbers in the following fields:
     - *When battery level is less than*
     - *Not synced in x minutes*

   Poll Pad Alerts - Critical

   - Click to display arrows to adjust the numbers in the following fields:
     - *When battery level is less than*
     - *Not synced in x minutes*
   - Click to select from the following drop-down lists:
     - *When power is disconnected*
     - *When printer is disconnected*

   Ballot Alerts - Warning

   - Click to display arrows to adjust the numbers in the two *When ballot count is less than* fields.

   Ballot Alerts - Critical

   - Click to display arrows to adjust the numbers in the two *When ballot count is less than* fields.

4. Click **SAVE**.

You are redirected to the *GENERAL* tab of *ACCOUNT SETTINGS*.

1.2.1.2 Managing Cancellation Reasons

To manage the reasons for cancellation, follow these steps:

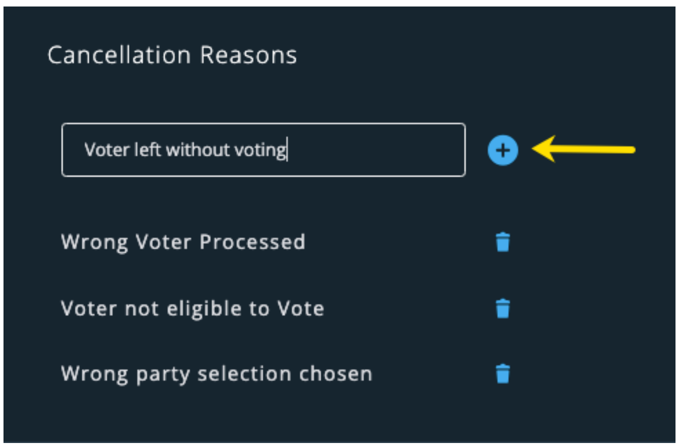
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **GENERAL**.

The *GENERAL* tab of *ACCOUNT SETTINGS* is displayed.

2. Click the **CANCELLATIONS** tab at the top of the *ACCOUNT SETTINGS* page.

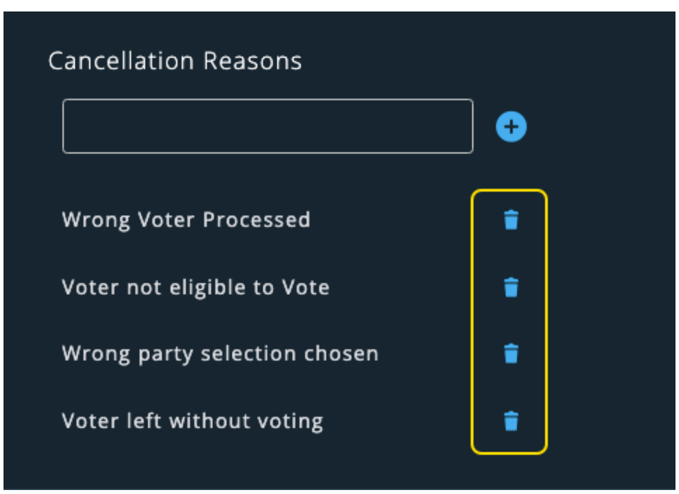
The *Cancellation Reasons* page is displayed.

3. Choose from the following options:
   - To add a *Cancellation Reason*, type the reason in the field and click the plus sign.



The reason is added to the *Cancellation Reasons* list.

   - To delete a *Cancellation Reason*, click the trash can  icon in line with the reason to delete.



The reason is removed from the *Cancellation Reasons* list.

1.2.1.3 Generating a QR Code

You must create a new QR Code when setting up your Poll Pads.

To generate a QR code, follow these steps:

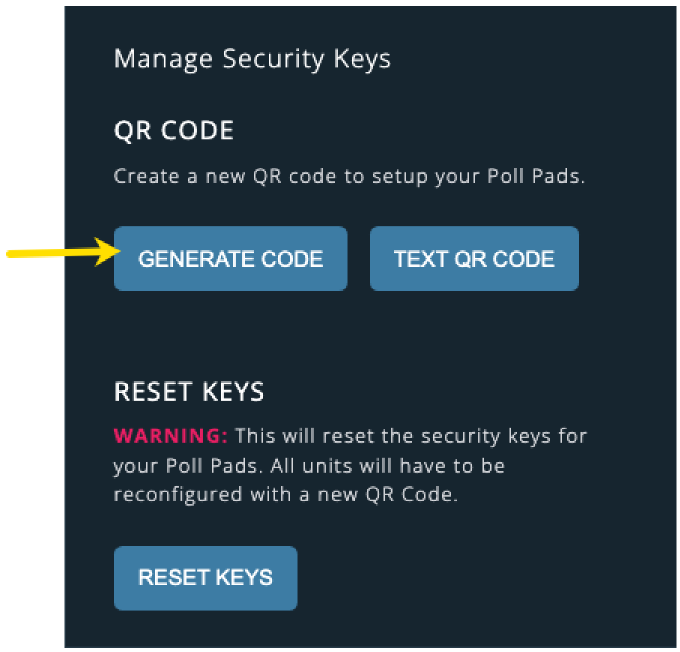
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **GENERAL**.

The *GENERAL* tab of *ACCOUNT SETTINGS* is displayed.

2. Click the *SECURITY KEYS* tab at the top of the *ACCOUNT SETTINGS* page.

The *Manage Security Keys* page is displayed.

3. Click **GENERATE CODE**.



The QR Code opens in a new browser tab.

4. Use your browser's print function to print the QR Code.

NOTE
To use the TEXT QR CODE or RESET KEYS functionality, contact Client Services.
Texting a QR Code poses a potential risk to the election and must be approved.

1.2.1.4 Managing Dashboard Settings

To manage your Dashboard settings, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **GENERAL**.

The *GENERAL* tab of *ACCOUNT SETTINGS* is displayed.

2. Click **DASHBOARD**.

The *Manage Election Day Dashboard* is displayed.

3. Click to select from the *Refresh interval* drop-down list.
   The *Refresh interval* sets how often the information on your election day dashboard will refresh.
4. Click to toggle the following optional settings on or off:
   - *Filter Registered Voter Count*
     i. Click to select from the *Voter Statuses to Include in Registered Voter Count* drop-down list.
   - *Include early voting in turnout*
   - *Include absentee voting in turnout*
   - *Show absentee count*
     i. Click to select from the *Absentee Statuses to Include in Absentee Count* drop-down list.
5. Click **SAVE**.

You are redirected to the *GENERAL* tab of *ACCOUNT SETTINGS*.

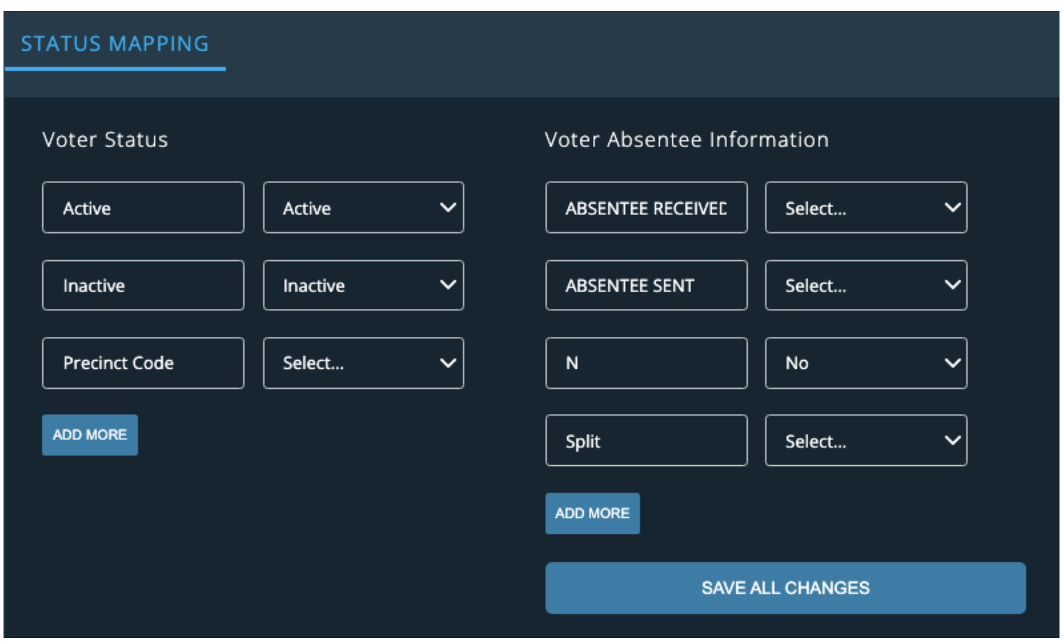
1.2.2 Voter Import Settings

This section maps the voter status codes from your voter registration system to the corresponding status for Poll Pad to ensure voters have the correct status on Election Day. The voter status code must correspond with what is provided by your voter registration system.

To set the mapping for Voter Import Options, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **VOTER IMPORT SETTINGS**.

The *VOTER IMPORT OPTIONS* PAGE - *STATUS MAPPING* page is displayed.



2. Choose from the following options:
    - To add voter statuses from your voter registration system and map them to existing Poll Pad statuses, click **ADD MORE** under *Voter Status*.
    - To add Voter Absentee statuses from your voter registration system and map them to existing Poll Pad codes, click **ADD MORE** under *Voter Absentee Information*.
3. Type the new codes and click to select the corresponding *Voter Status* or *Voter Absentee Information* for Poll Pad.
4. Click **SAVE ALL CHANGES**.

1.2.3 Poll Pad Setup

From the *Poll Pad Setup* module, you can manage *Printing*, *iSync Drive*, and *Voter QR Codes*.

1.2.3.1 Printing Tab

You can select, add, edit, or delete printer receipts from the *Printing* tab of the *Poll Pad Setup* menu.

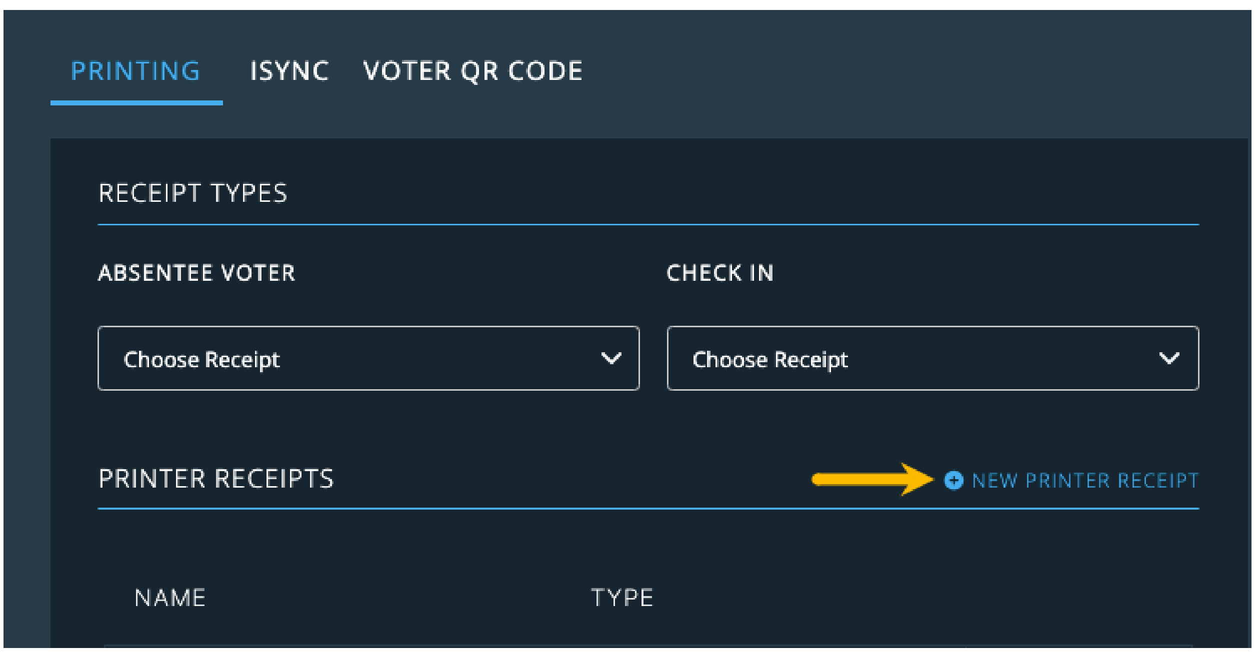
1.2.3.1.1 Creating a New Printer Receipt

To create a new printer receipt, follow these steps:

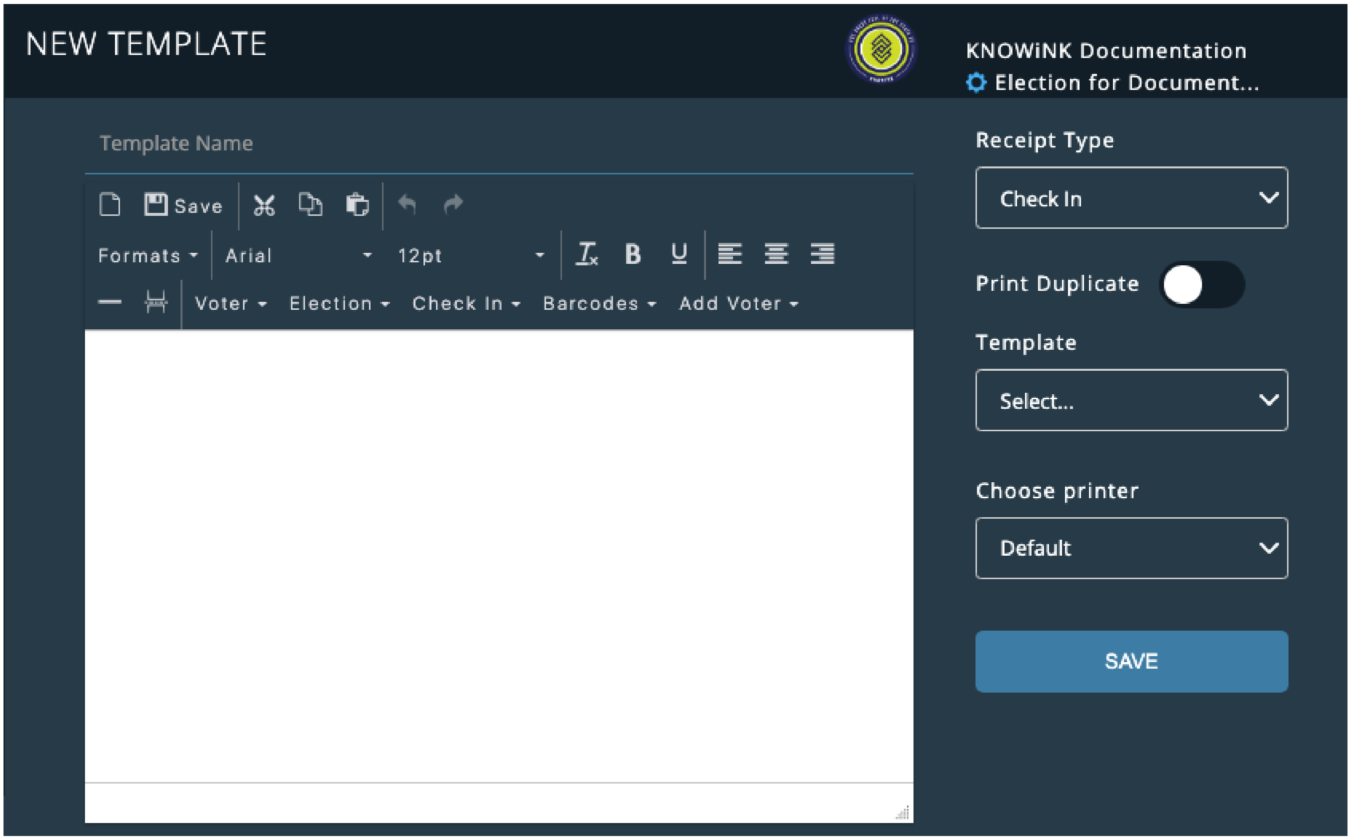
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

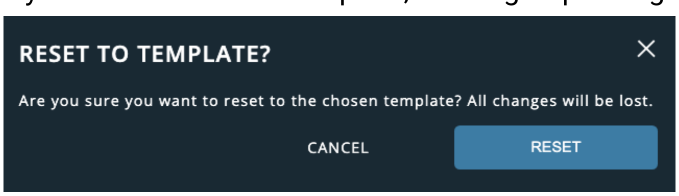
2. Click **NEW PRINTER RECEIPT**.



The *NEW TEMPLATE* form appears.



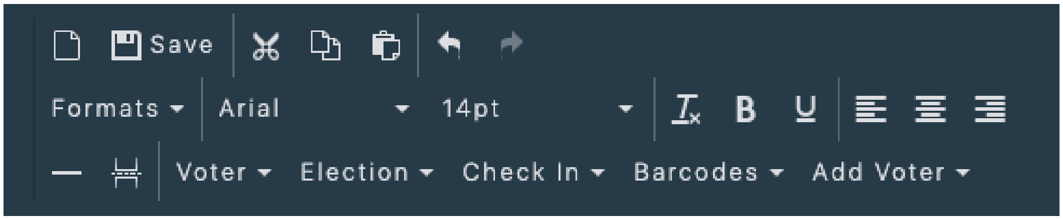
3. Enter a name in the *Template Name* field.
4. Click to select from the following drop-down menus:
   - *Receipt Type*
   - *Template*
     If you select a Default template, a dialog requesting confirmation will appear.

     i. Click **RESET**.
   - *Choose Printer*
5. Click to toggle on or off *Print Duplicate*.

6. Edit the template as needed using the editing tools provided, including the drop-down menus for the following fields:

    - Voter
    - Election
    - Check In
    - Barcodes
    - Add Voter



7. Click **SAVE**.

A confirmation message is displayed, and the template will appear in the *PRINTER RECEIPTS* table.

NOTE
You must select this receipt during Poll Pad Setup in order for the Poll Pad to use it. See *Selecting a Printer Receipt* for instructions.

1.2.3.1.2 Selecting a Printer Receipt

To select a printer receipt, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

2. Click to select the type of receipt you want the Poll Pad to use from the *Choose Receipt* drop-down menu.

1.2.3.1.3 Editing a Printer Receipt

To edit a printer receipt, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

2. Click the pencil icon in line with the receipt to edit.

The *EDIT TEMPLATE* form appears.

3. Edit the template as needed using the editing tools provided, including the drop-down menus for the following fields:

    - Voter
    - Election
    - Check In
    - Barcodes
    - Add Voter

4. You can also make changes to the *Receipt Type*, *Print Duplicate*, or *Choose Printer* selections if needed.

5. Click **SAVE**.

A confirmation message is displayed.

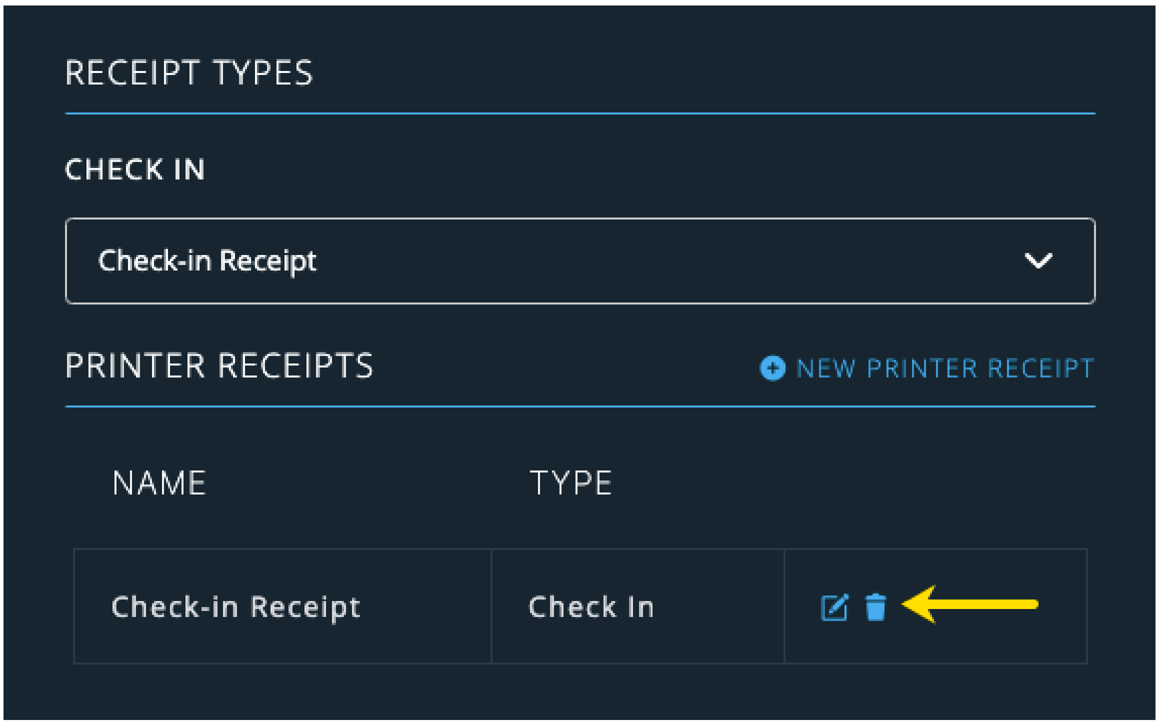
1.2.3.1.4 Deleting a Printer Receipt

To delete a printer receipt, follow these steps:

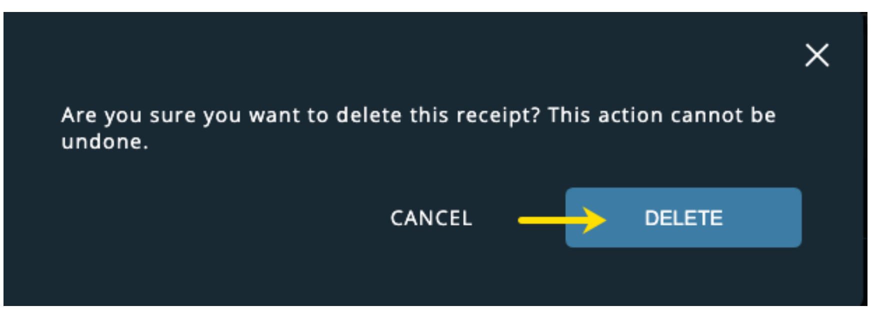
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

2. Click the trashcan icon  in line with the receipt to delete.



A dialog requesting confirmation appears.



3. Click **DELETE**.

The receipt is removed from the list.

1.2.3.2 iSync Tab

You can create a new iSync file to load onto Poll Pad or import an existing iSync file back into ePulse from the *ISYNC* tab of the *Poll Pad Setup* menu.

1.2.3.2.1 Creating an iSYNC File in ePulse

Before generating an iSYNC file, you must set up your election, configuration settings, and all Poll Pad assignments in ePulse. If you make any changes to Poll Pad assignments or configurations after creating the iSync file, you will have to repeat this process.

To generate an iSYNC file, follow these steps:

1. Insert the *iSYNC* into a USB port on your computer.
2. Click **ACCOUNT SETTINGS** in the left navigation menu of ePulse, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

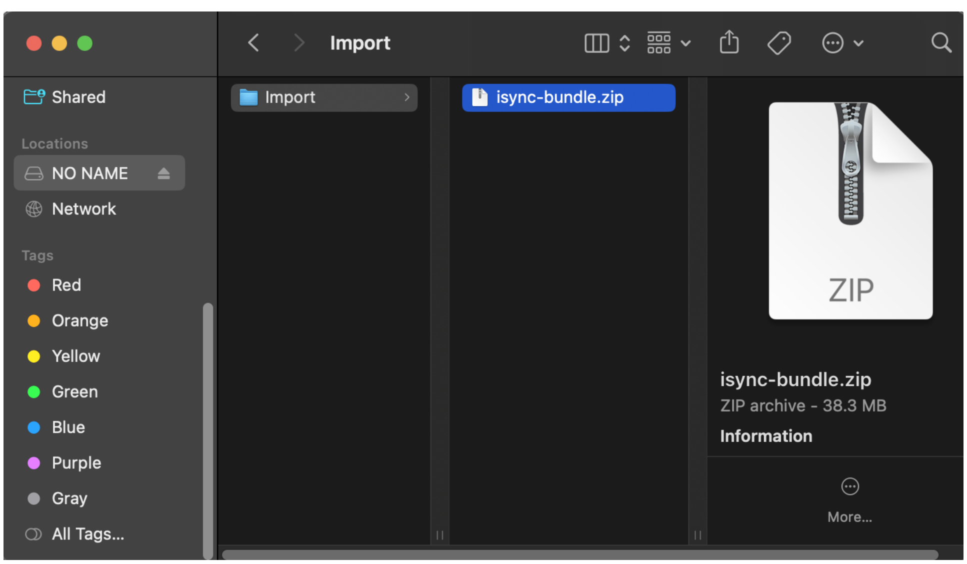
3. Click the **ISYNC** tab.
4. Click **GENERATE NEW** under *iSYNC DRIVE*.

The *iSync File* appears in the *FILES* table.

5. Once processing has been completed, click **DOWNLOAD**.
6. The ZIP file downloads to your computer, and the name is formatted as in the following example: isync-bundle.zip

DO NOT OPEN THIS FILE.

7. Save this file to the *IMPORT* folder in the root of the iSYNC Drive on your computer. If the *IMPORT* folder does not exist, create one on the root of the iSync Drive.



8. Eject iSYNC from your computer.
9. Save the same file to additional iSYNC drives as needed.

1.2.3.3 Voter QR Code Tab

A QR code can be generated for voter statuses that were recently updated. The QR code can be downloaded as a PDF or sent as an SMS text message.

To generate QR Codes containing voter status and absentee status updates, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu of ePulse, and select **POLL PAD SETUP**.

The *PRINTING* tab of the *POLL PAD SETUP* page is displayed.

2. Click the **VOTER QR CODE** tab.

The *Voter Status QR Codes* page is displayed.

3. Click to select one of the following from the *Include Statuses for* drop-down list.
    - *All Polling Places*
    - *Specific Polling Places*
      Another drop-down list appears.
        i. Click to select which polling place to include, and click **ADD**.
        ii. Repeat until you have selected all of the polling places to include.
            The selected polling places appear below the drop-down list.
4. Choose from the following options in the *Delivery Method* drop-down menu:
    A. Select *Create PDF*, and click **GENERATE**. (This is the recommended method)
       The PDF file appears in the *FILES* table.
        - Once processing has completed, click **DOWNLOAD** in line with the appropriate PDF file.

       A ZIP file of the QR Codes is downloaded to your computer.
    B. Select *Send by SMS* and click **GENERATE**.
       The *Additional Phone Numbers* field appears.
        - Enter phone numbers (one per line) to send the SMS to.

       The *Processing SMS Request* message is displayed, and the SMS messages are sent.

1.2.4 Help Menu

1.2.4.1 Importing Help Menu Files

Documents and videos can be uploaded into ePulse to download onto the Poll Pad. After importing an election file to your Poll Pads, the files will be available in the Training Materials menu.

To import Help Menu files, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **HELP MENU**.

The *HELP MENU* is displayed.

2. Click **ADD PAGE**.

The *Help Menu Item* form appears.

3. Click to select from the *Content type* drop-down list.

4. Click in the *Order* field to display arrows and enter a number to indicate how this help file will relate to others. For example, if this file is the first/highest priority, enter *1* here.
5. Enter the *Title* to display on the Poll Pad under the Help menu.
6. Optional: Enter a *Subtitle*.
7. Click the *Enabled* toggle on to make the content available for download on Poll Pads.
8. Click **Choose a File**.

The open file dialog appears.

9. Navigate to the applicable help file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

10. Click **SAVE**.

A confirmation message is displayed.

11. Turn on *Enable Help Menu* under *General* in your Configuration Profile.

See *Managing Poll Pad Configurations* for more information.

1.2.4.2 Previewing Help Menu Files

Once help files are imported, you can preview them in ePulse.

To preview a Help File, follow these steps:

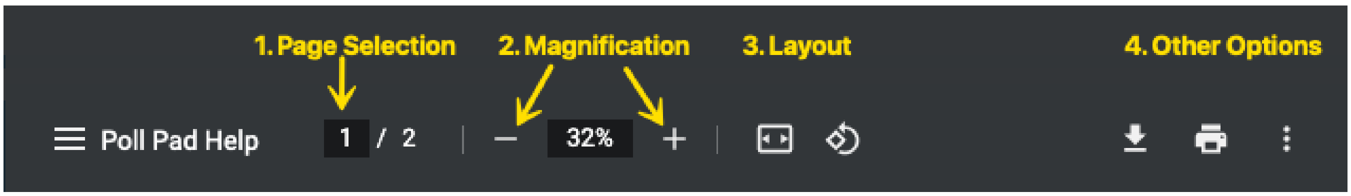
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **HELP MENU**.

The *HELP MENU* is displayed.

2. Click **Preview** in line with the Help File to preview.

A preview window appears.

3. Use the tools at the top of the preview window to adjust your view and other options.

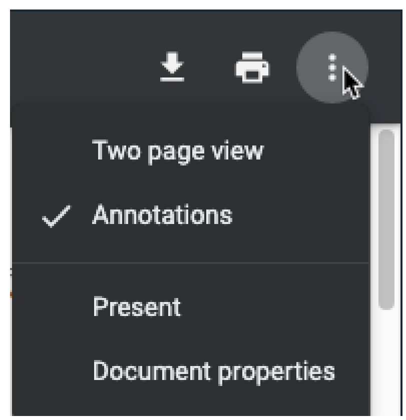


To adjust the view, use the icons in the toolbar as follows:

1. Page Selection
   Type the page number you would like to view in the number field to go to that page.
2. Magnification
   - To zoom out, the minus sign.
   - To zoom in, click the plus sign.
3. Layout
   - To adjust the page width, click the *Fit to Page/Width* icon.

- Click the rotate arrow to rotate clockwise 90 degrees at a time.

4. Other Options
   - To download the file, click the download icon.
   - To print the help file, click the printer icon.
   - To see additional options, click the vertical ellipsis.



1.2.5 Managing ID Methods

A screen will display on Poll Pad to assist a poll worker in selecting a valid ID method to process a voter.

1.2.5.1 Adding ID Methods

You can add state-specific ID Methods for processing a voter on Poll Pad.

To add ID Methods, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click **ADD**.

The *Add Id Method* form appears.

3. Type the information into the following fields:
    - *Name*
      Enter the type of ID
    - *Heading*
      Enter heading information. Example: Is a Valid ID
    - *Instructions*
      Enter the instructions to display on the Poll Pad when this ID Method is chosen.
    - *Order*
      Click in the *Order* field to display arrows to choose a number to display the order of ID Method.
4. Click to select from the header *Color* drop-down list.
5. Click the toggles to turn the following options on or off.
    - *Show Does Name Match*
      If enabled, additional *Heading* and *Instructions* are required.
    - *Show Does Address Match*
    - *Show is ID Expired*
6. Click **SUBMIT**.

The new ID Method is listed in the table.

Enable *Show ID Methods* under *Voter Check-in* in your Poll Pad Configuration Profile.

1.2.5.1.1 Editing ID Methods

To edit an ID Method, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click the pencil icon in line with the ID method to edit.

The *Edit Id Method* form appears.

3. Edit as needed, and click **SUBMIT**.

The changes are applied to the ID Method.

1.2.5.1.2 Deleting ID Methods

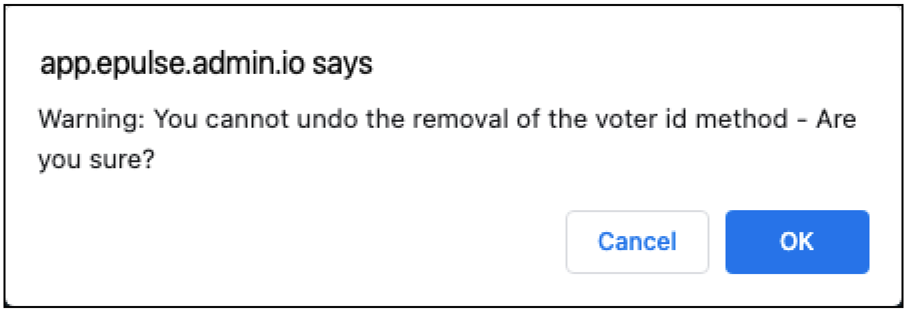
To delete an ID Method, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click the trash can icon in line with the ID Method to delete.

A dialog requesting confirmation appears.



3. Click **OK**.

The prompt is removed from the table.

1.2.5.1.3 Creating Buttons or Alternate Buttons for ID Methods

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click the *Buttons* or *Alt Buttons* link in line with the applicable ID Method.

The *Primary Buttons* or *Alternate Buttons* form appears.

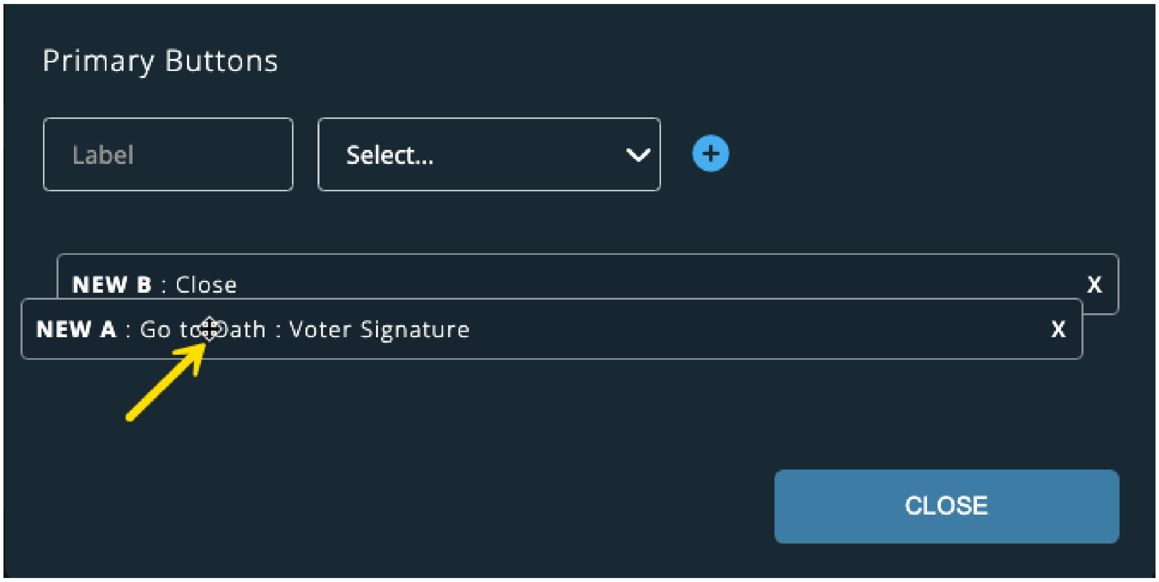
3. In the *Label field*, enter a name that will display on the button following these rules:
   - Ensure the name reflects the button's action.
   - Only use a button name one time or to result in the same outcome.
   - Limit the number of characters.
4. From the *Select* drop-down menu, choose the action attached to the button. The following selections will prompt a text field or another drop-down list to appear.
   - *Close*
   - *Process Provisionally With Confirmation**
   - *Process Provisionally Without Confirmation**
   - *Go To Voter Confirmation Screen*
   - *ID Statement*
   - *Allow Voter to Vote*
   - *Go to Oath**
     Click to select an oath to attach.

* These two options prompt a third drop-down list or field to appear.

5. Click the plus sign  to add the button.

The button appears in the list below.

6. Click and drag to change the order of buttons.



7. Repeat as necessary and click **CLOSE** when you are done creating buttons.

The buttons are applied to the selected prompt.

1.2.5.2 Importing ID Methods

To import ID Methods, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click **IMPORT**.

The *Upload Voter ID Methods File* page appears.

3. Click **Choose a File**.

The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

6. When processing is complete, click **DONE**.

The *ID Methods* page is displayed.

1.2.5.3 Exporting ID Methods

To export ID Methods, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **ID METHODS**.

The *ID METHODS* page is displayed.

2. Click **EXPORT**.

The *voter_id_methods.txt* file is downloaded to your computer.

1.2.6 Managing Prompts

Prompts display customized messages to poll workers to help guide them through the correct steps for processing voter statuses frequently encountered on Election Day.

Creating a prompt is a three-step process:

1. Edit the content of the prompts that will display on Poll Pads.
2. Set the criteria that will trigger the prompts to display the proper voter statuses.
3. Create Poll Pad buttons that allow the poll worker to process the voter.

1.2.6.1 Creating a Prompt

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

2. Click **ADD**.

The *Add Prompt* form appears.

3. Type the information into the following fields:
    - *Name*
    - *Heading*
    - *Order*
    - *Field label*
    - *Field name**
      *No spaces or capital letters permitted.
    - *Instructions*
4. Click to select from the *Status color* drop-down list.
5. Click the toggles to turn the following options on or off.
    - *Show Voter Info*
    - *Show Text Field*
    - *Show DOB Field*
6. Click **SUBMIT**.

The prompt appears in the *PROMPTS* table.

1.2.6.1.1 Editing a Prompt

To edit a prompt, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

2. Click the pencil icon in line with the prompt to edit.

The *Edit Prompt* form appears.

3. Edit as needed, and click **SUBMIT**.

The changes are applied to the prompt.

1.2.6.1.2 Deleting a Prompt

To delete a prompt, follow these steps:

4. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

5. Click the trash can icon in line with the PROMPT to delete.

A dialog requesting confirmation appears.

4. Click **OK**.

The prompt is removed from the table.

1.2.6.2.3 Creating and Editing Buttons for Prompts

Setting the criteria tells the prompt when to display.

8. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

9. Click the *Buttons* link in line with the appropriate prompt.

The *BUTTONS* form appears.

10. In the *Label field*, enter a name that will display on the button following these rules:
    - Ensure the name reflects the button's action.
    - Only use a button name one time or to result in the same outcome.
    - Limit the number of characters to what will fit on the button.
11. From the *Select* drop-down menu, choose the action attached to the button. The following selections will prompt a text field or another drop-down list to appear.
    - *Process Provisionally With Confirmation*
    - *Process Provisionally Without Confirmation*
    - *Go To*
    - *Send Flag*
    - *Update Voter Status**
    - *Update Absentee Status**
    - *Process Provisional Generic*

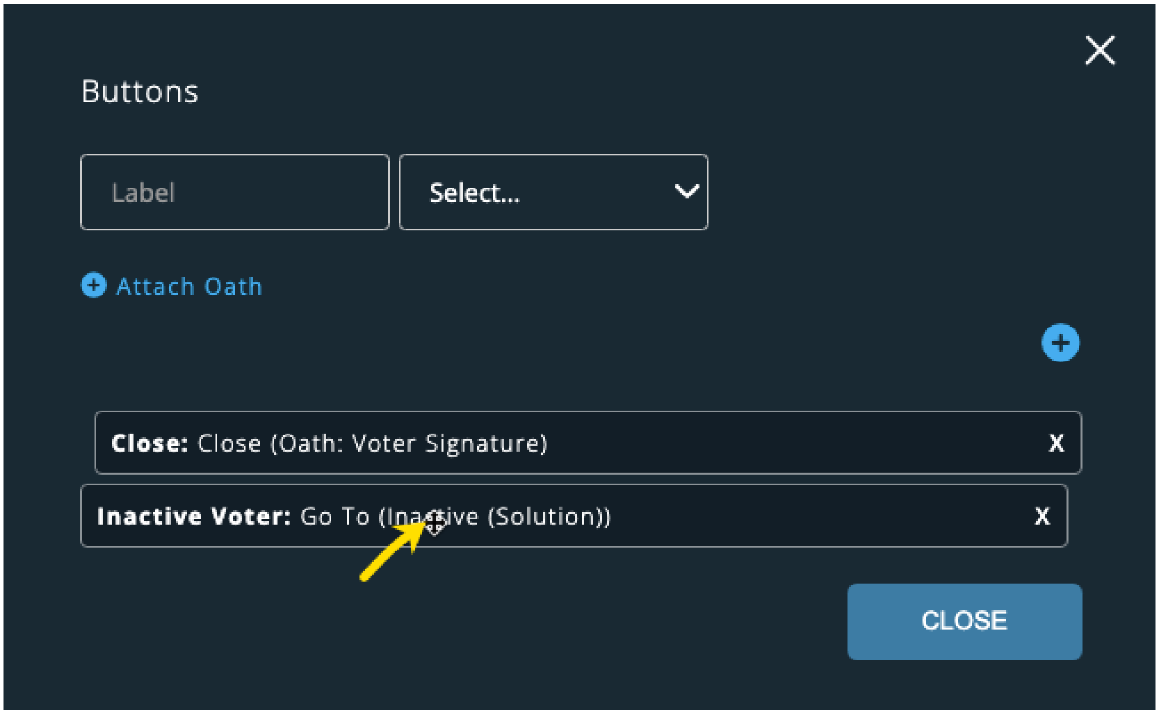
* These two options prompt a third drop-down list to appear.

12. Click *Attach Oath* to select an oath to attach.

13. Click the plus sign to add the button.

The button appears in the list below.

14. Click and drag to change the order of buttons.



15. Repeat as necessary and click **CLOSE** when you are done creating buttons.

The buttons are applied to the selected prompt.

1.2.6.2.4 Setting and Editing Criteria for Prompts

Setting the criteria tells the prompt when to display. To set button criteria, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

2. Click the *Criteria* link in line with the applicable prompt.

The *CRITERIA* form appears.

3. Set the applicable criteria as follows:
    - *All Voters*
      Any voter processed will receive the prompt
    - *Voted Voters*
      Any voter marked as Voted will receive the prompt.
    - *No Ballot Voters*
      Any voter without a ballot style available will receive the prompt.
    - *Apply if*
      Select **ANY match** unless otherwise instructed.
    - Add Criteria
      Click to select from the drop-down list.

i. Choosing *Voter Status, Absentee Status, Voter ID Required, Voter Federal Only, Voter Over 18, Party Affiliation*, or *DOB Eligibility Date* will prompt a secondary field or drop-down list to select from in order to set the functionality for the prompt.

ii. *Voter Status Reason* requires a secondary drop-down list and a text field.

- Click the plus sign to add the criteria.

The new criteria display.

4. Repeat as necessary and click **SAVE** when finished.

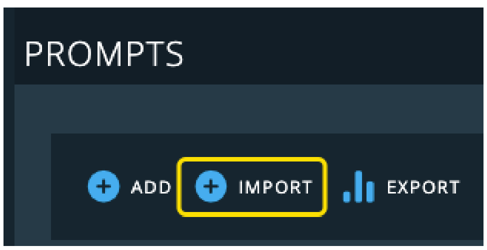
1.2.6.2 Importing Prompts

To upload a file of prompts, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

2. Click **IMPORT**.



The *Upload Prompts File* page is displayed.

3. Click **Choose a File**.

The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

6. When processing is complete, click **DONE**.

The *PROMPTS* page is displayed.

1.2.6.3 Exporting Prompts

To download the existing prompts file, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **PROMPTS**.

The *PROMPTS* page is displayed.

2. Click **EXPORT**.

The *prompts.txt* file is downloaded to your computer.

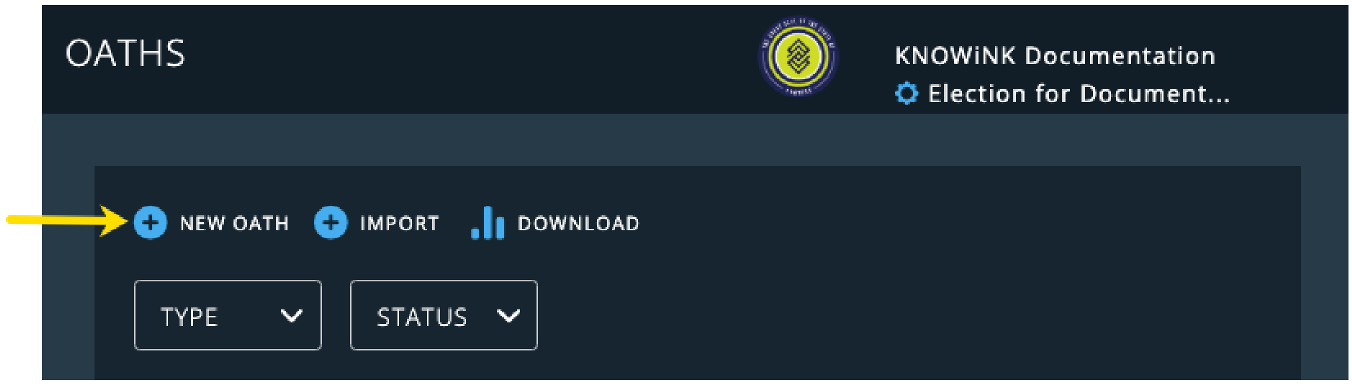
1.2.7 Managing Oaths
Custom oaths can be created in ePulse, or you can import an existing Oaths file.

1.2.7.1 Creating a New Oath
To create a new oath, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **OATHS**.

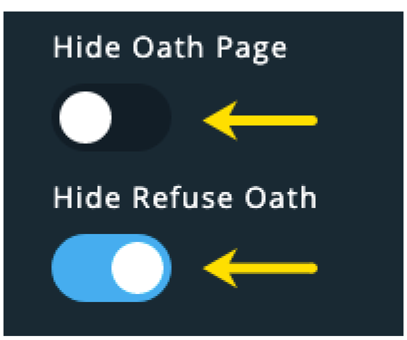
The *OATHS* page is displayed.

2. Click **NEW OATH**.



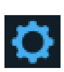
The *New Oath* form is displayed.

3. Enter the *Name* of the Oath.
4. Click to select from the *Oath Type* drop-down to determine which screen displays the oath on the Poll Pad.
5. Click to select how many from the *Signatures required* drop-down list.
6. Enter oath in the text box.
    - Type [NAME] to display a voter's name and [ADDRESS] to display their address.
7. To allow *Hide Oath Page* or *Hide Refuse Oath*, click to toggle on.



8. Click **SUBMIT**.

The new oath appears in the *OATHS* table.

9. Click the gear icon  in the *Poll Pad Configurations* column in line with the new oath.

The *Assign Oath to Configurations* form appears.

10. Click to select from the *Assign Oath to Configurations* drop-down menu, and click **SUBMIT**.

The Poll Pad configuration is set.

1.2.7.1.1 Editing an Oath

To edit an oath, follow these steps:

4. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **OATHS**.

The *OATHS* page is displayed.

5. Click the pencil icon in line with the oath to edit.

The *Edit Oath* form appears.

6. Edit as needed, and click **SUBMIT**.

The changes are applied to the oath.

1.2.7.1.2 Deleting the Oath

To delete an oath, follow these steps:

6. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **OATHS**.

The *OATHS* page is displayed.

7. Click the trash can icon in line with the oath to delete.

A dialog requesting confirmation appears.

8. Click **OK**.

The oath is removed from the table.

1.2.7.2 Importing an Oaths File

To import/upload an oaths file, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **OATHS**.

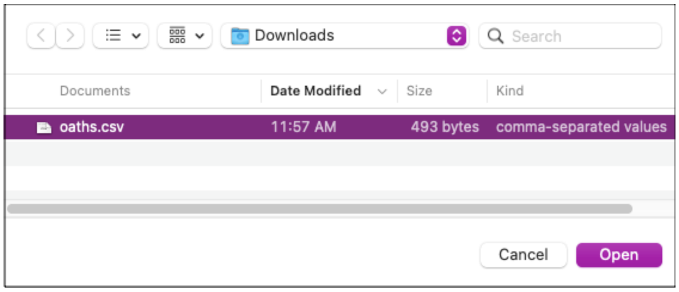
The *OATHS* page is displayed.

2. Click **IMPORT**.

The *Upload Oaths File* page appears.

3. Click **Choose a File**.

The open file dialog appears.



4. Navigate to the applicable .csv file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Optional: Under *ADDITIONAL OPTIONS*, click to toggle on or off *Skip duplicates (name and type)*.
6. Click **CONTINUE**.

Once the file upload completes, the Processing File page is displayed.

7. When processing is complete, click **DONE**.

The *ELECTIONS* page is displayed.

1.2.7.3 Downloading the Oaths File

To download an oaths file from ePulse, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **OATHS**.

The *OATHS* page is displayed.

2. Click **DOWNLOAD**.

The .csv file is downloaded to your computer.

1.2.8 Add/Edit Voters

1.2.9 Users

Administrative users can add users and assign the permissions needed to access voter data in ePulse.

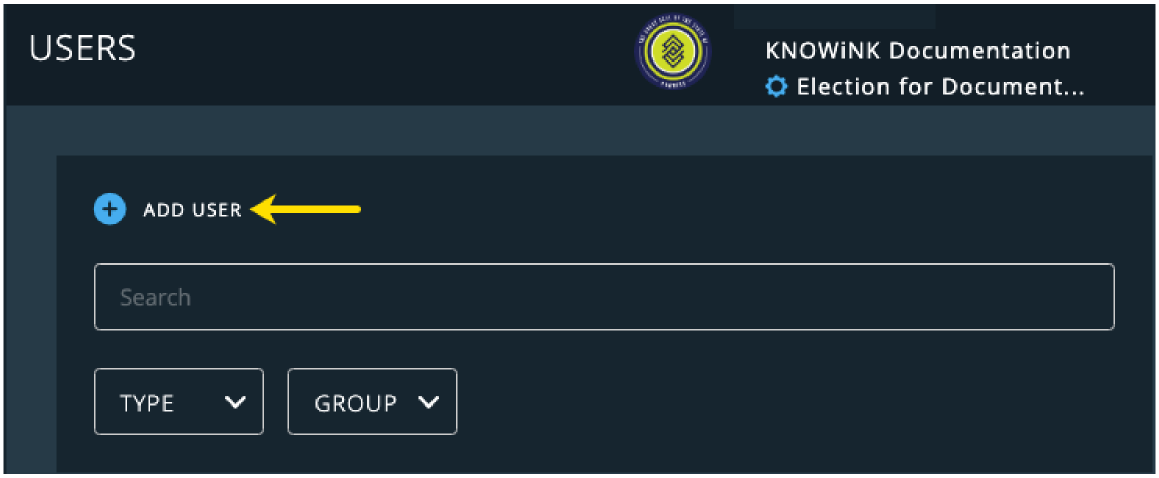
1.2.9.1 Adding Users

To add a new user, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **USERS**.

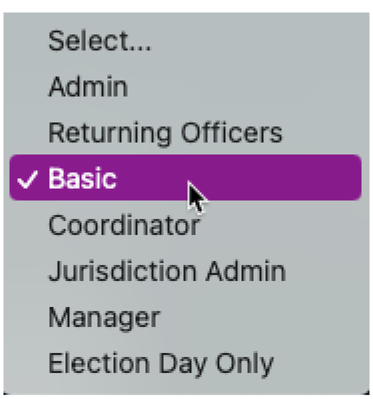
The *USERS* page is displayed.

2. Click **ADD USER**.

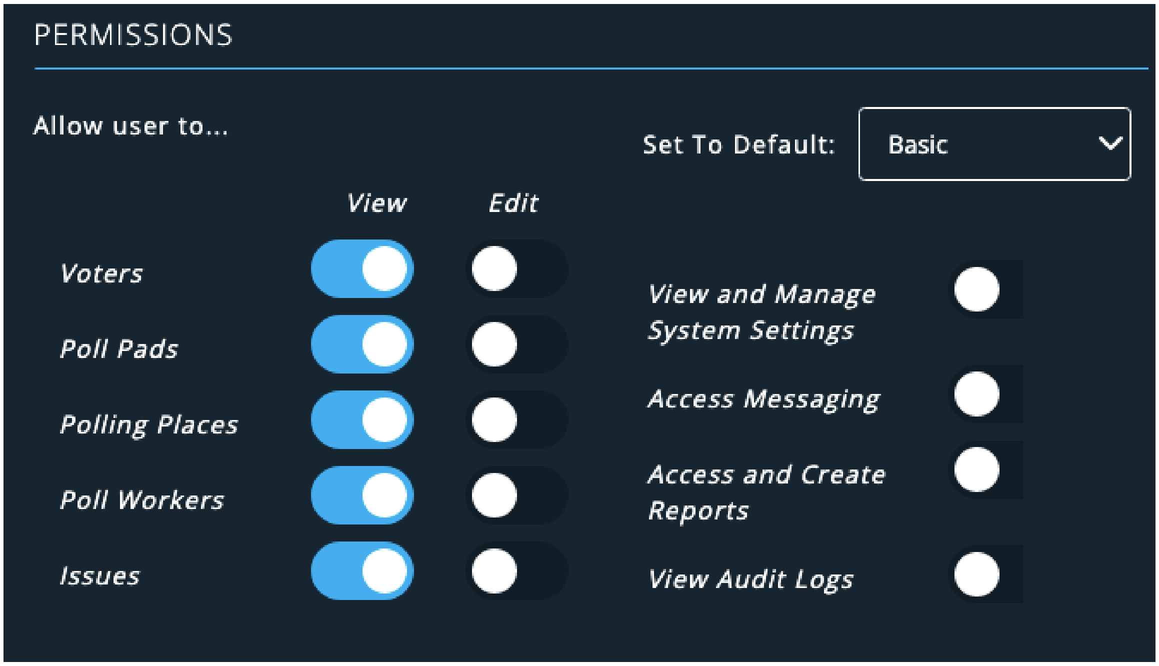


The *NEW USER - PROFILE* form is displayed.

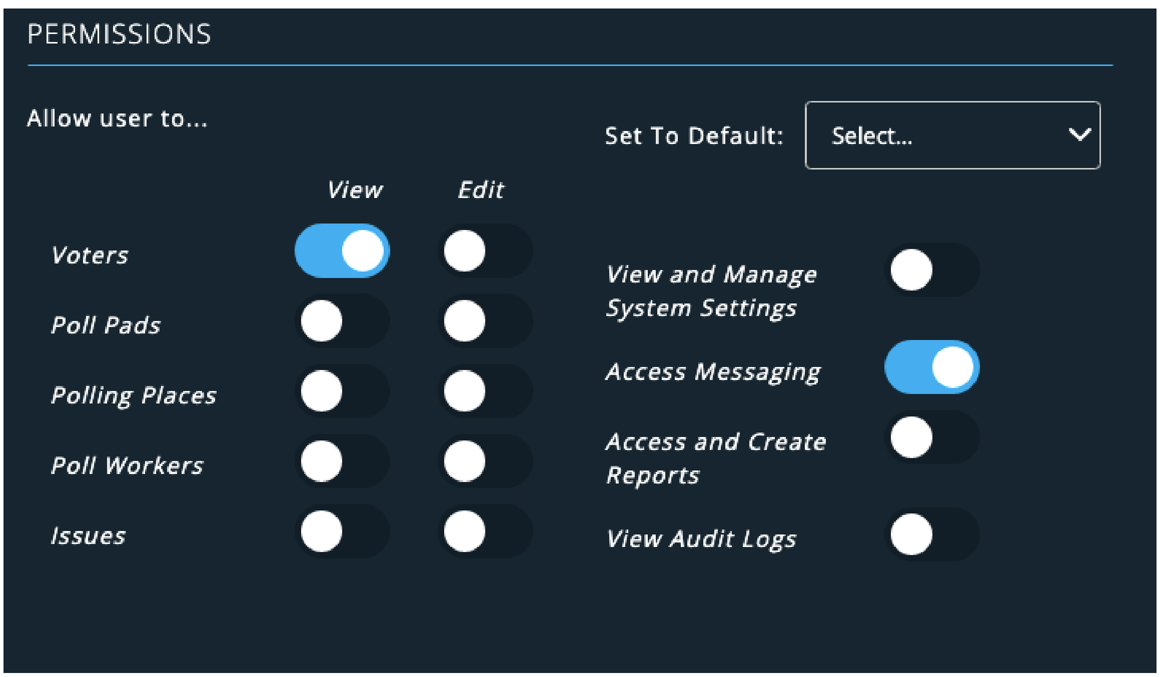
3. Enter the user's personal information in the following fields:
    - *First name*
    - *Last Name*
    - *Phone for sms messages*
    - *E-mail*
      The activation email will be sent to this email address.
4. Click to select from the following drop-down menus:
    - *Type of User*
    - *Notify by*
      Select **Email** to send a link prompting the new user to set a password.
    - *Groups*
5. Choose from the following options under *PERMISSIONS*:
    A. To set the user's permissions to a pre-defined default setting, follow these steps:
        i. Click to select from the *Set To Default* drop-down menu.



As you select from the menu, the permissions below will update to match your selection.



B. To choose a custom set of permissions for a new user, click to toggle on either *View* or *Edit* in line with the appropriate permission(s).



6. Click **SUBMIT**.

   A confirmation message appears, and a link to set a password is sent to the user's email.

1.2.9.2 Editing Users

To update user information, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **USERS**.

The *USERS* page is displayed.

2. Click the applicable user's *Email*.

The *EDIT USER* page is displayed.

3. Update as needed, and click **SUBMIT**.

1.2.9.3 Deleting Users

To delete a user, follow these steps:

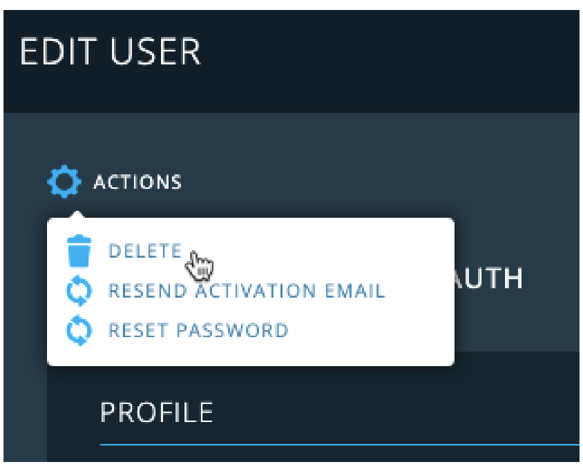
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **USERS**.

The *USERS* page is displayed.

2. Click the applicable user's *Email*.

The *EDIT USER* page is displayed.

3. Click **ACTIONS**, and select **DELETE**.



A dialog asking for confirmation appears.

4. Click **OK**.

CAUTION: Clicking **OK** will immediately delete the user and cannot be undone.

1.2.9.4 Enabling Two-Factor Authentication

Enabling Two-Factor Authentication adds a layer of security when logging into ePulse. A mobile device that can receive SMS messaging is required for this feature.

To enable two-factor authentication, follow these steps:

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **USERS**.

The *USERS* page is displayed.

2. Click the applicable user's *Email*.

The *EDIT USER* page is displayed.

3. Click the **TWO FACTOR AUTH** tab.
4. Click the toggle to *Enable sms two-factor auth*
5. Enter a phone number in the *Phone* field, and click **SUBMIT**.

A confirmation message appears, and the next time the user logs into ePulse, an Authentication message will be sent to the phone number.

1.2.10 Restrictions

Setting restrictions requires users to enter a username and password to access the Poll Pad application.

1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **RESTRICTIONS**.

The *ACCOUNT RESTRICTIONS* page is displayed.

2. Click to select one of the following *Restriction presets*.
   - Disabled
     No restrictions. No username or password is required to access the Poll Pad application.
   - One Worker*
     Allows one poll worker to sign in to access the Poll Pad application.
   - Two Workers*
     Requires two poll workers to sign in to access the Poll Pad application.
   - Republican Democrat
     The username and pin of both a Republican and a Democrat are required to access the Poll Pad application.
   - One Pollworker Pin
     Only one Username and Pin are required to access the Poll Pad application, and the Username and Pin are the same for all Poll Pads.

NOTE
Poll workers must be added, enabled, and have a Username and Password created in their record to use the One or Two Worker option, and it only works in conjunction with the Poll Worker module.
The One and Two Workers Restrictions are Not Recommended. Contact support for more information.

3. Type to enter how many seconds elapse before the application locks in the *Inactivity timeout (seconds)* field. The minimum is 3600 seconds.
4. To include a privacy statement, click the *Privacy statement enabled* toggle to turn it on and enter the statement in the *Privacy statement* field.
5. Click **SAVE**.

A confirmation message is displayed.

1.2.11 Languages

English is the default language of Poll Pad, but you can configure multiple languages in ePulse. From the Languages module in ePulse, you can accomplish the following tasks:

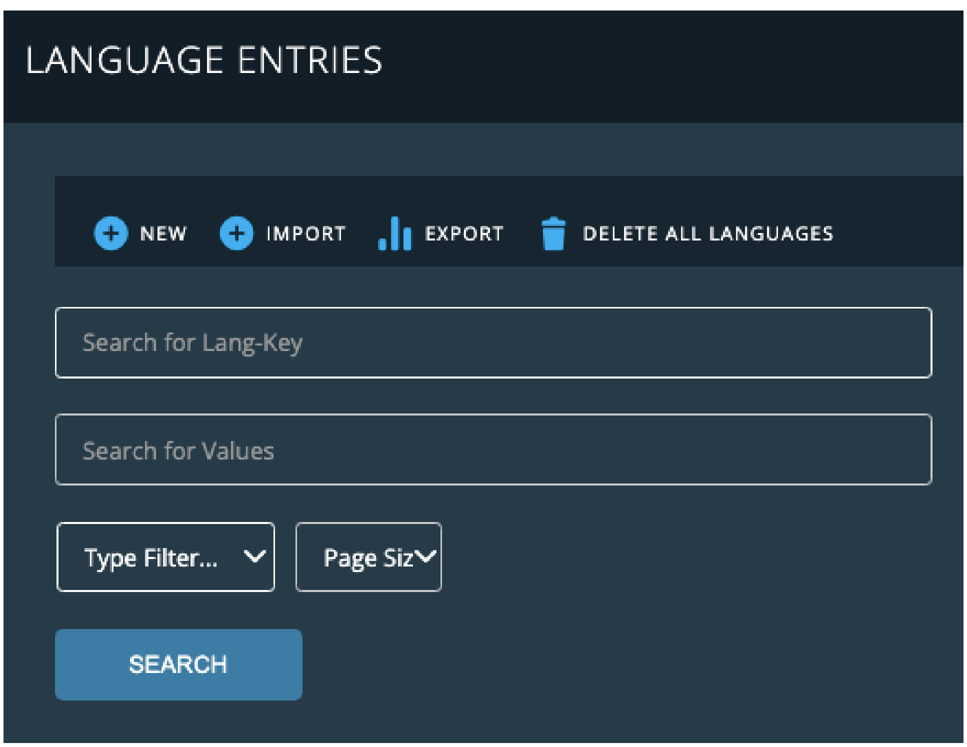
• Search for *Lang-Keys* or *Values* • Edit the *Value* given to a *Lang-Key* • Delete translations for a *Lang-Key*	• Add a new language entry • Import or Export a CSV language file • Delete languages

1.2.10.1 Searching for Lang-Keys or Values

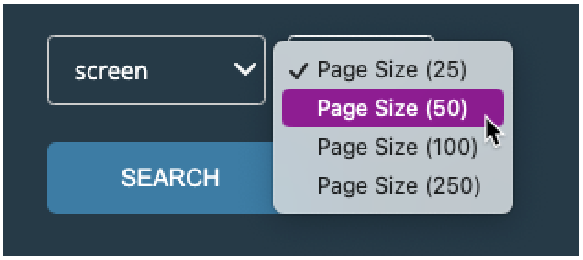
1. Click **ACCOUNT SETTINGS** in the left navigation menu, and select **LANGUAGES**.

The *LANGUAGE ENTRIES* page is displayed.

2. Enter search criteria in the *Search for Lang-Keys* and/or *Search for Values* fields.



3. To refine your search criteria, click to select from the *Type Filter* drop-down list.
4. To choose how many items per page are listed in the results table, click to select the *Page Size*.

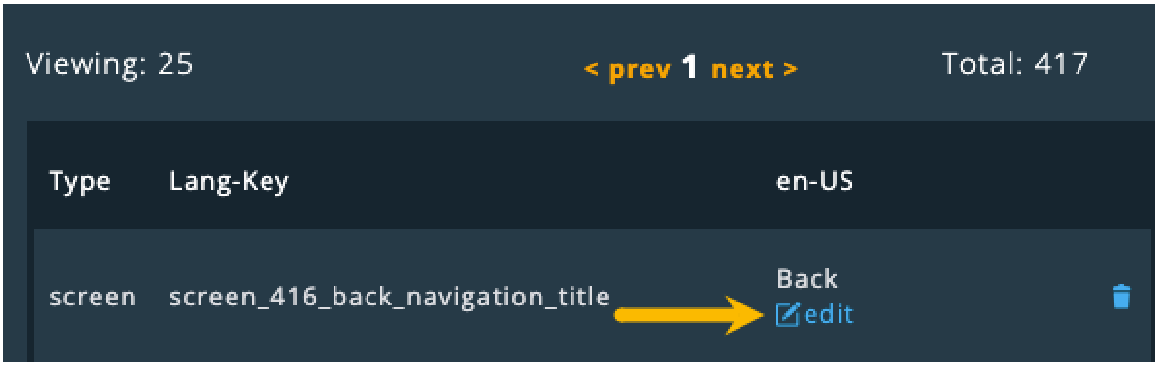


5. Click **Search**.

The *Lang-Key* table updates with the result of your search.

1.2.11.2 Editing Lang-Key Values

1. Locate the Lang-Key as instructed in *Searching for Lang-Keys or Values*.
2. Click **Edit** in line with the applicable Lang-Key.



3. Edit the *Value* field as needed and click **SUBMIT**.

The *LANGUAGE ENTRIES* page is displayed, and the *Lang-Key* value has been updated.

1.2.11.3 Deleting Individual Lang-Key Translations

1. Locate the Lang-Key as instructed in *Searching for Lang-Keys or Values*.
2. Click the trashcan icon  in line with the applicable Lang-Key.

3. Click **OK.**

CAUTION: Clicking **OK** immediately deletes the translation and cannot be undone.

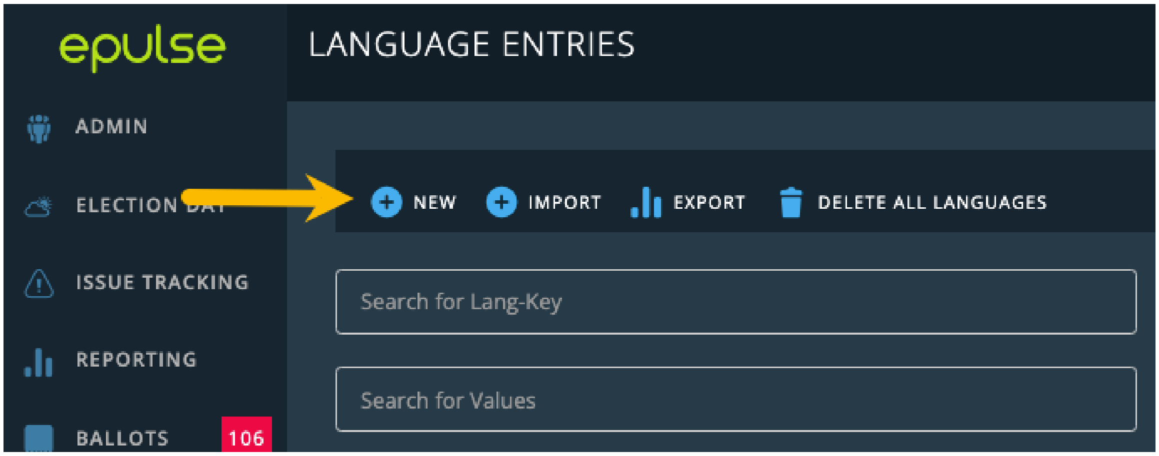
1.2.11.4 Adding a New Language Key

You can create new language keys and assign them to labels, screen buttons, etc.

1. Click **ACCOUNT SETTINGS** in the left navigation menu and select **LANGUAGES**.

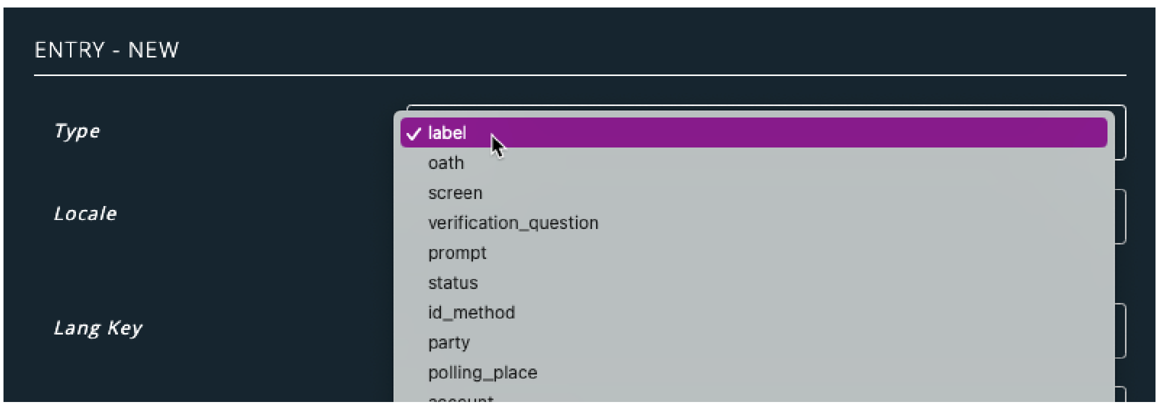
The *LANGUAGE ENTRIES* page is displayed..

2. Click **NEW**.



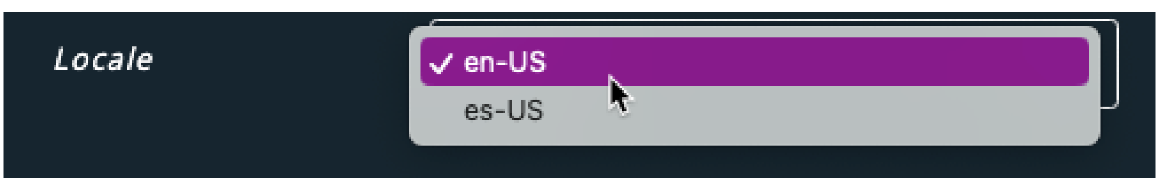
The *ENTRY - NEW* form appears.

3. Click to select from the *Type* drop-down list.



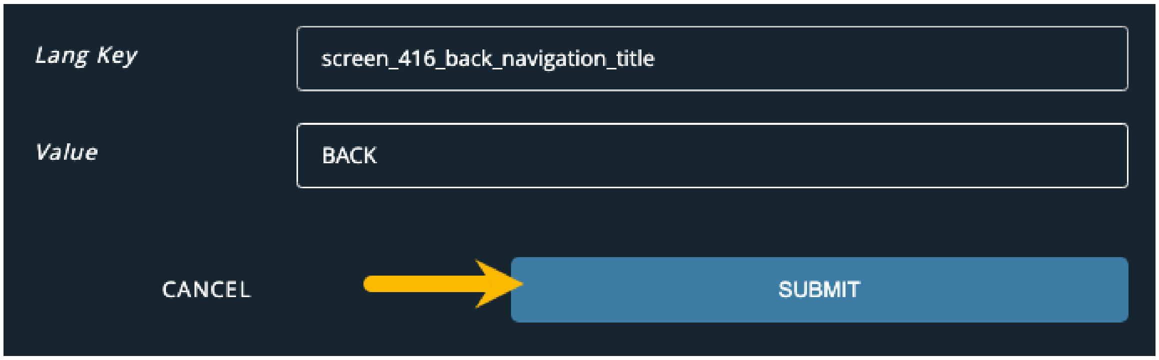
4. Click to select from the *Locale* drop-down list.

The *Locale* field only applies if multiple languages are enabled for Poll Pad.



5. Enter the *Lang Key*.
6. Enter the *Value* for the Lang Key.
   The *Value* must be an exact Lang Key to match one on Poll Pad. Contact support for assistance locating a language key for a new entry.

7. Click **SUBMIT**.



1.2.11.5 Importing a CSV language file

1. Locate the Lang-Key as instructed in *Searching for Lang-Keys or Values*.
2. Click **IMPORT**.

The *Upload Language File* page is displayed.

3. Click **Choose a File**.

The open file dialog appears.

4. Navigate to the applicable help file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Click **CONTINUE**.

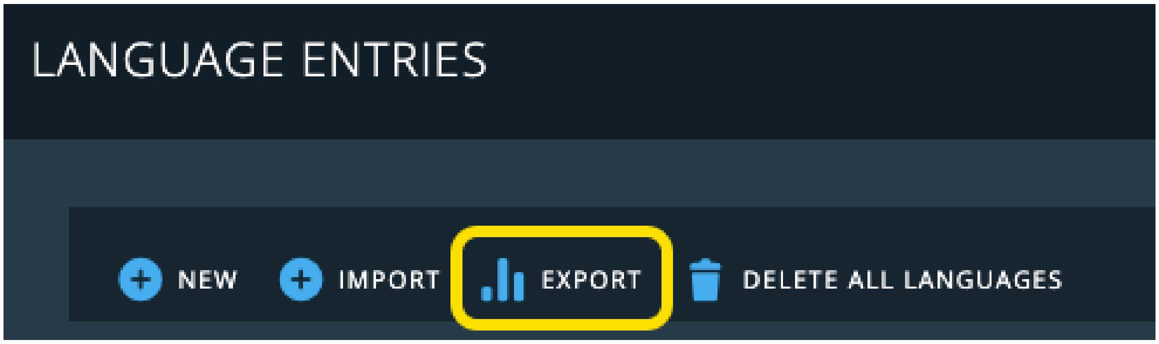
Once the file upload completes, the *Processing File* page is displayed.

6. When processing is complete, click **DONE**.

The *Lang-Key* table is populated with the data from the imported CSV.

1.2.11.6 Exporting a CSV language file

1. Locate the Lang-Key as instructed in *Searching for Lang-Keys or Values*.
2. Click **EXPORT**.



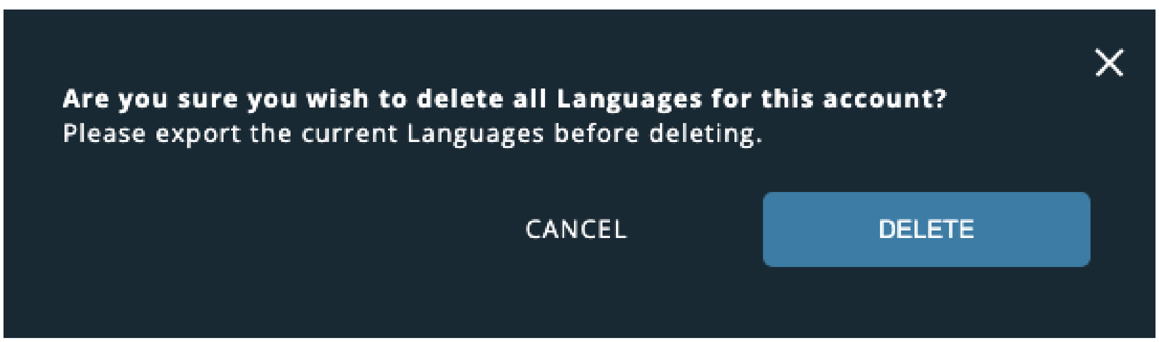
The CSV file is downloaded to your computer.

1.2.11.7 Deleting All Languages

Be sure to export the current languages before choosing this option. See *Exporting a CSV language file*.

1. Locate the Lang-Key as instructed in *Searching for Lang-Keys or Values*.
2. Click **DELETE ALL LANGUAGES**.

A dialog requesting confirmation appears.



3. Click **DELETE**.

CAUTION: Clicking DELETE immediately deletes all languages. Export existing languages as a backup before deleting them.

Table of Contents

2.0 Election Setup

2.1 Creating an Election

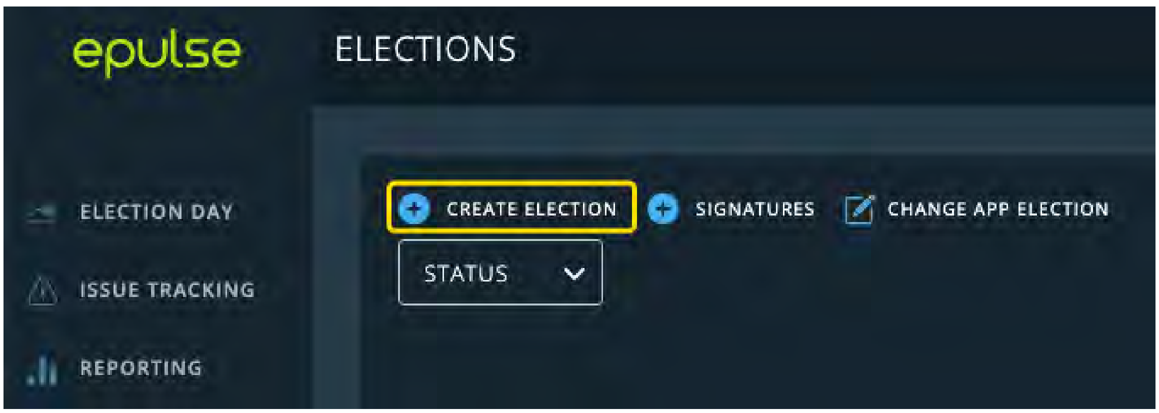
If you are creating a Primary election, be sure to set up parties in ePulse before you begin. See *Managing Parties* for more information.

To add an election to ePulse, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* page is displayed.

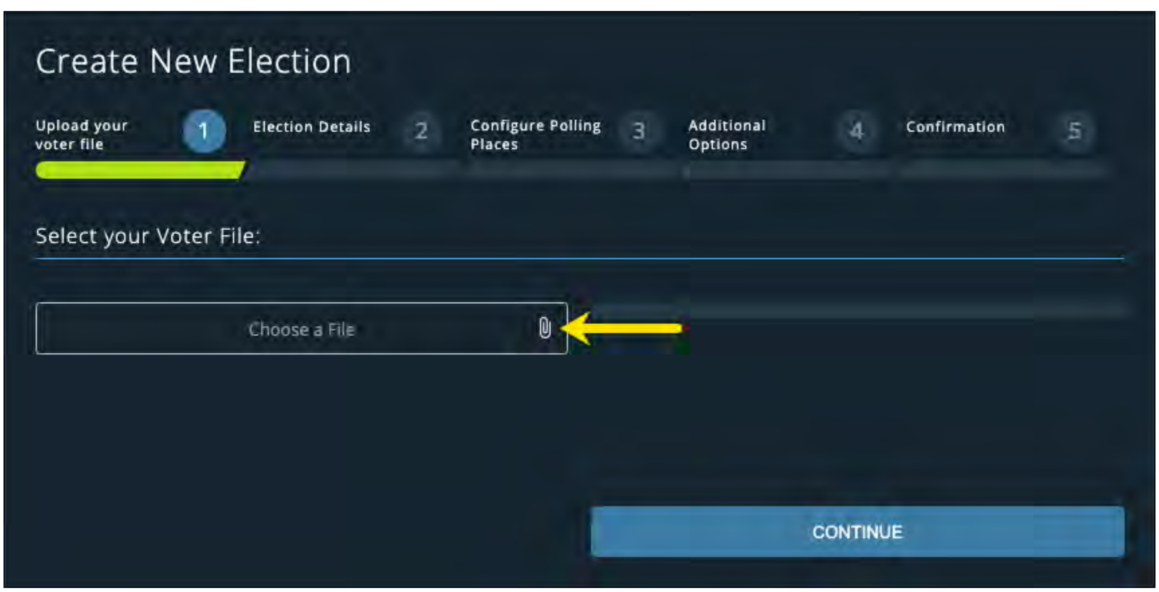
2. Click **CREATE ELECTION**.



The *Create New Election* page appears.

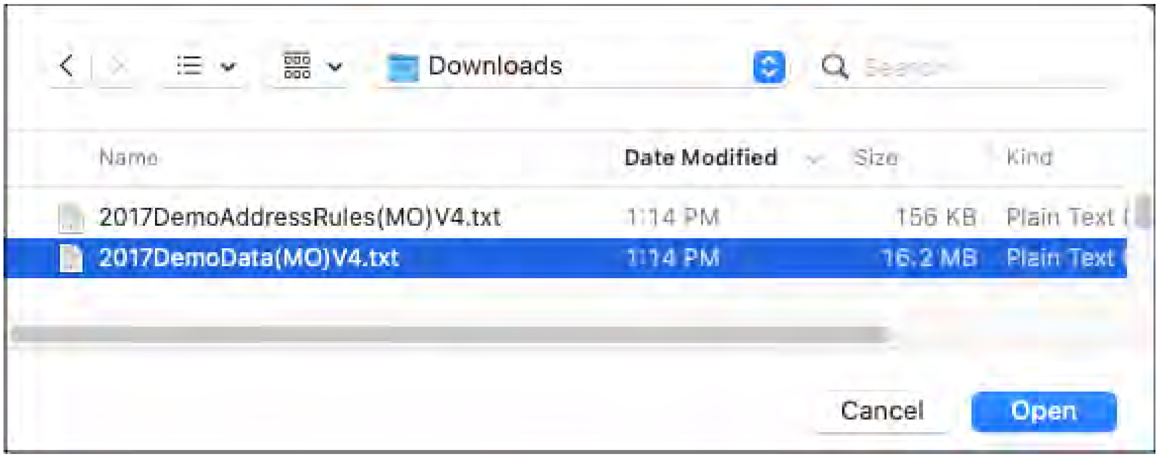
3. To upload the Voter File, follow these steps:

    a. Click **Choose a File**.

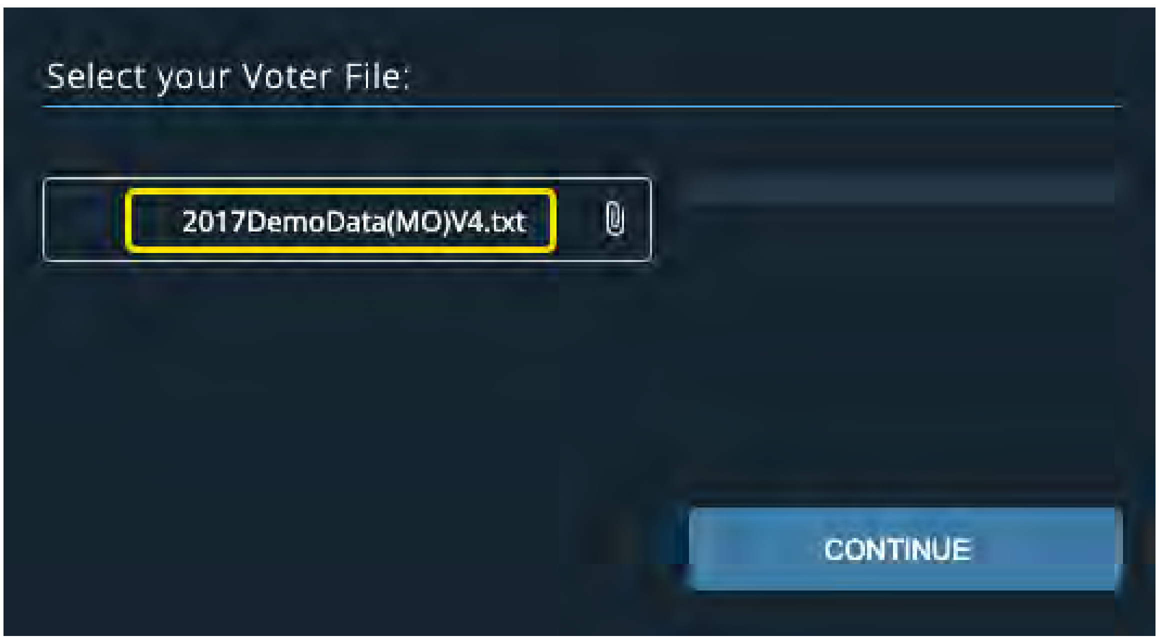


The open file dialog appears.

b. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

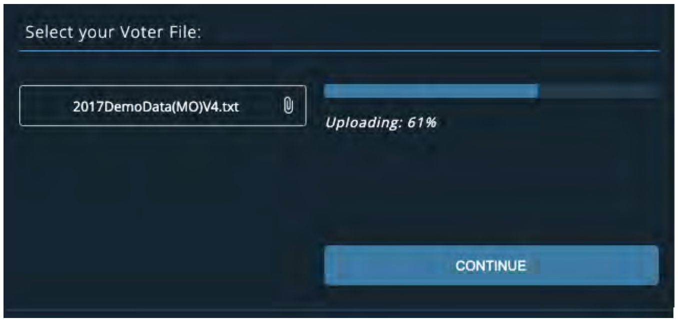


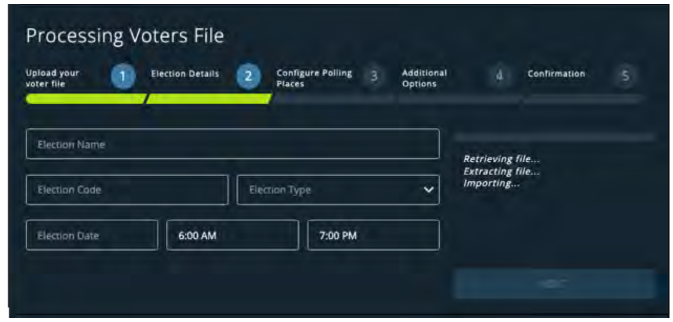
The *Choose a File* field is now populated with the uploaded file.



c. Click **CONTINUE**.

Once the file upload completes, the *Processing Voters File* page is displayed. You can populate the *Election Details* while the file is processing.



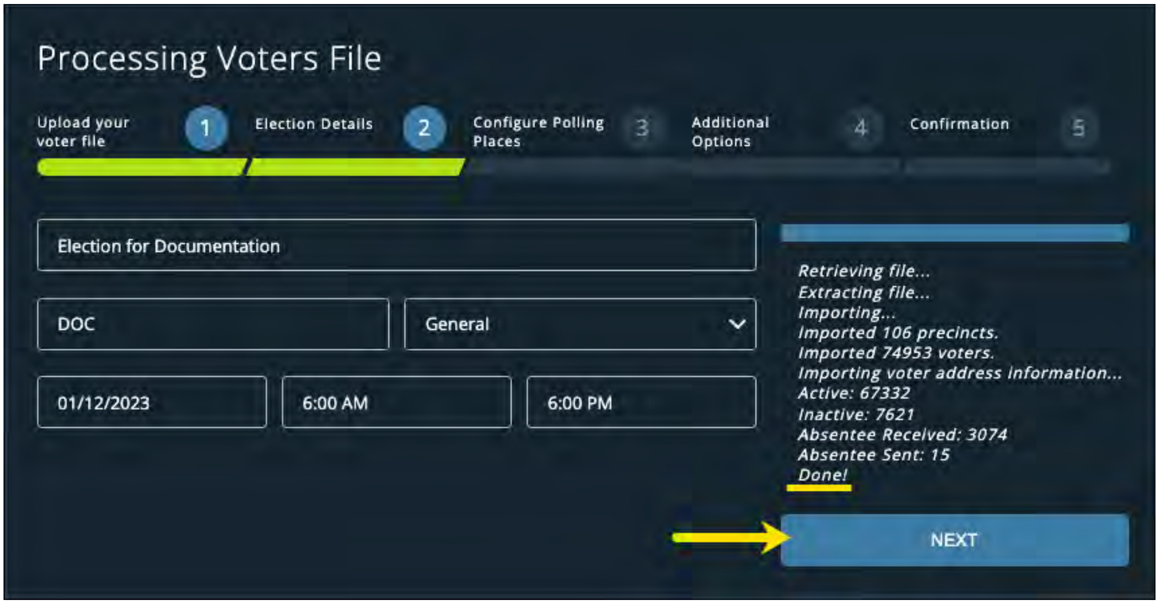


Warning: Do not open the files and resave them. ePulse is designed to accept data files as formatted by the voter registration system(s).

4. To populate the *Election Details,* complete the following fields:
   - *Election Name*
     - Enter the name of the election.
       This is also the name that will be displayed on Poll Pads.
   - *Election Code*
     - Enter the election code required by your Voter Registration System (VRS).
       Enter any unique three-digit code if your VRS does not require an election code.
   - *Election Type*
     - Click to select **General** or **Primary** from the drop-down list.
   - *Election Date*
     - Enter the date of Election Day.

   The following fields are not labeled and are to the right of the Election Date.
   - Start Time
     - Start Time is when the polls open on Election Day.
   - End Time
     - End Time is when the polls close on Election Day.
5. Once these fields are completed, and the file is done processing, verify that all imported data totals in ePulse are correct by matching them against the following data from your voter registration system:
   - Precincts
   - Voters
   - Addresses
   - All other data points

6. If the imported data counts match your records, click **NEXT**.



The *Configure Polling Places* screen is displayed. To Add or Import Polling Places, see the *Polling Places* section of this guide.

7. Optional: To copy polling places from another election, click **COPY PLACES**, and follow these steps:
   a. Click to select from the *election* drop-down list and click **COPY**.
   b. Click **DONE**.
8. Verify the following information:
   - There are no unassigned voters listed at the top of the screen.
   - The list of polling places matches the polling places in the voter registration system.
   - Any polling place changes made in ePulse between elections are reflected.
   - Any precinct changes (i.e., moved or split among polling places) are reflected.

NOTE
If the voter registration system does not load polling places, contact KNOWiNK Client Support for assistance using a template at (855) 765-5723 or support@knowink.com

9. Click **DONE**.

The *Additional Options* screen is displayed.

10. To skip *Additional Options* and create the election, click **DONE**.

The *Create New Election* page appears. For instructions on *Additional Options*, see the *Additional Options* section below.

11. Verify the *ELECTION DETAILS* data matches the date in your voter registration system, and click **CONFIRM**.

Monitor the progress while ePulse generates the voter database for the election.
For large voter databases, this could take some time.

Once the database is built, ePulse will return to the ELECTION DETAILS screen.

2.1.1 Additional Options

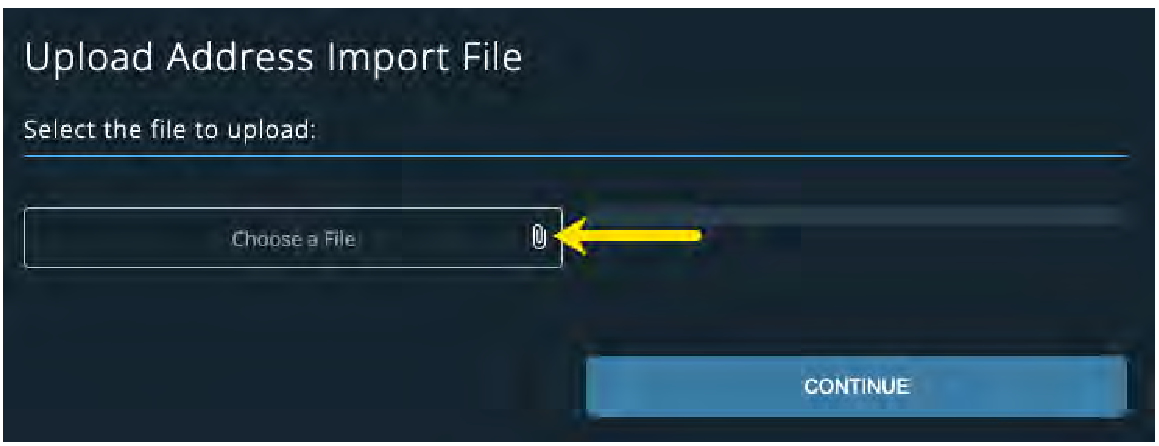
You can Import Street Rules, Transfer Poll Pads, and/or Update App Election while creating an election.

Importing Street Rules

1. To import street rules, click **IMPORT ADDITIONAL STREET RULES**.

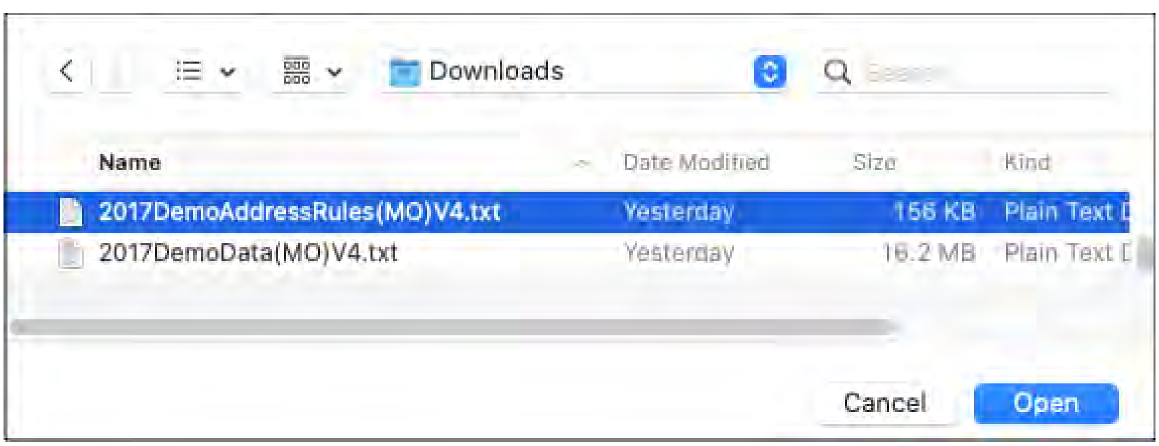
The *Upload Address Import File* page is displayed.

2. Click **Choose a File**.

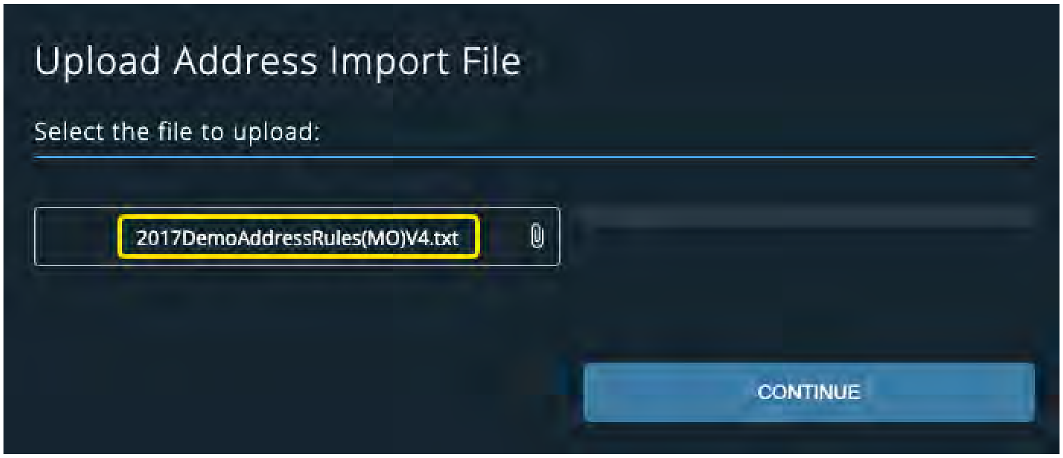


The open file dialog appears.

3. Navigate to the applicable file and double-click it, or highlight it and click **Open**.



The *Choose a File* field is now populated with the uploaded file.



4. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

5. When processing is complete, click **DONE**.

The system returns to the *ADDITIONAL OPTIONS* page.

6. Click **DONE** or continue adding additional options.
7. Verify the election details, and click **CONFIRM**.

Transferring Poll Pads

1. To transfer Poll Pads, click to select one of the following options from the *TRANSFER POLL PADS* drop-down menu:
    - *All*
      All of the Poll Pads from the last election will transfer to this last election.
    - *None*
      You can assign a select number of Poll Pads to the election after it is created.
    - *By Tags* - Enter the tag name in the *Select* field.
      The system will display a list of matching or similar tag names as you type. Selecting from the list will auto-populate the field.
2. Click **DONE** or continue adding additional options.

If you click **DONE**, the *ELECTION DETAILS* screen is displayed.

3. Verify the election details, and click **CONFIRM**.

Updating App Election

1. Click to toggle on *Update App Election* to enable all auxiliary applications to use this election.
2. Click **DONE** or continue adding additional options.

If you click **DONE**, the *ELECTION DETAILS* screen is displayed.

3. Verify the election details, and click **CONFIRM**.

2.1.2 Importing Supplemental Voter Files

To import supplemental voter files, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

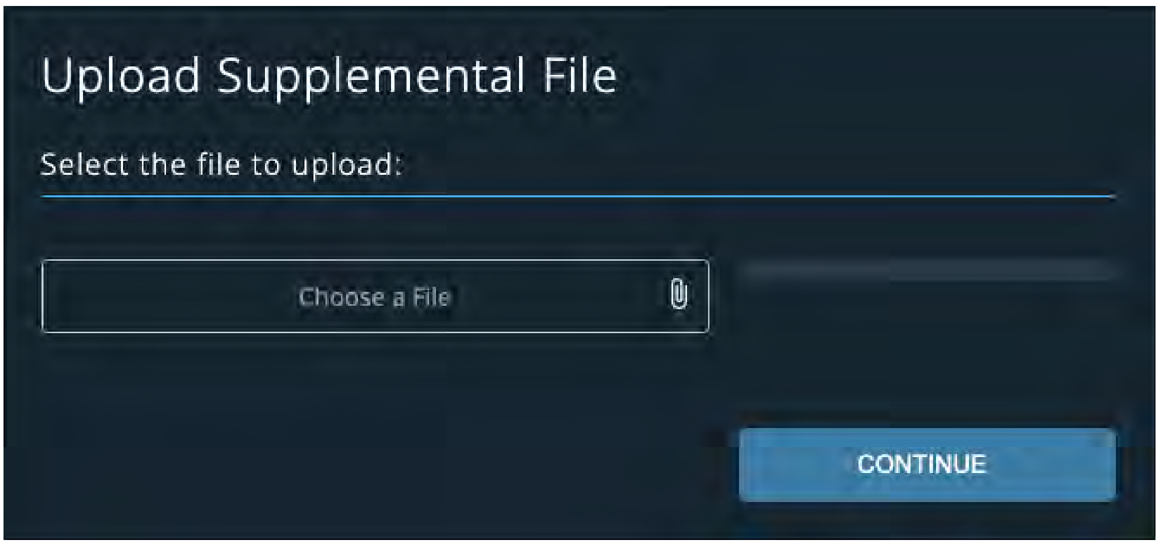
The *ELECTIONS* page is displayed.

2. Click on the current election name.

The *ELECTION DETAILS* page is displayed.

3. Click *IMPORT SUPPLEMENTAL VOTERS*.

The *Upload Supplemental File* page is displayed.



4. Click **Choose a File**.

The open file dialog appears.

5. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

6. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

7. When the file is done processing, verify that all imported data totals in ePulse are correct.
8. If the imported data counts match your records, click **DONE**.

Supplemental file changes will sync to Poll Pad units as long as the Poll Pad is connected to Wi-Fi and Server Sync is enabled in the Configuration Profile.

Other methods for updating Poll Pads are the Absentee Scanner or iSync drive. See the *Generating a QR Code* or *iSync Tab* sections in *Getting Started and Account Settings*.

2.1.3 Uploading Address Rules

If you didn't import street/address rules during election creation, you can do so from the Election Details page.

To import address rules from the *Election Details* page, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* page is displayed.

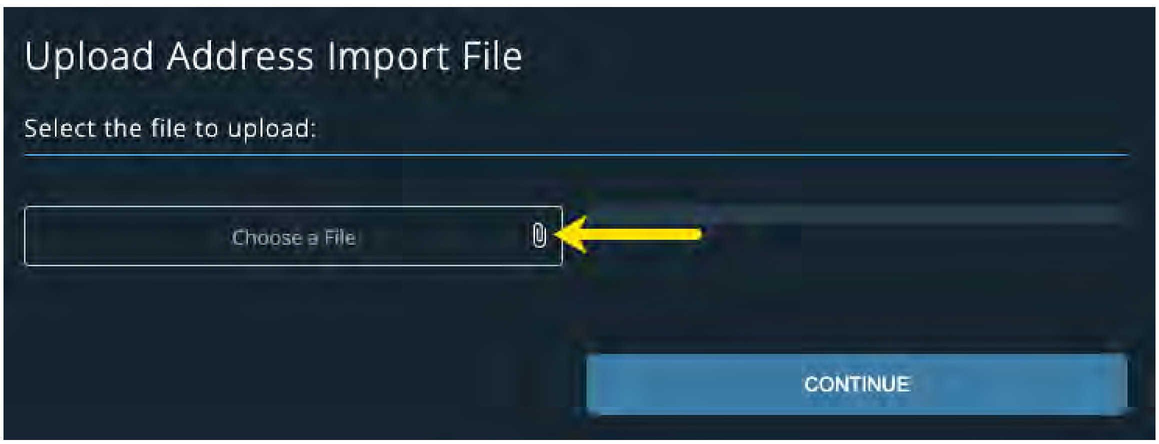
2. Click on the current election name.

The *ELECTION DETAILS* page is displayed.

3. Click **ADDRESS RULES**.

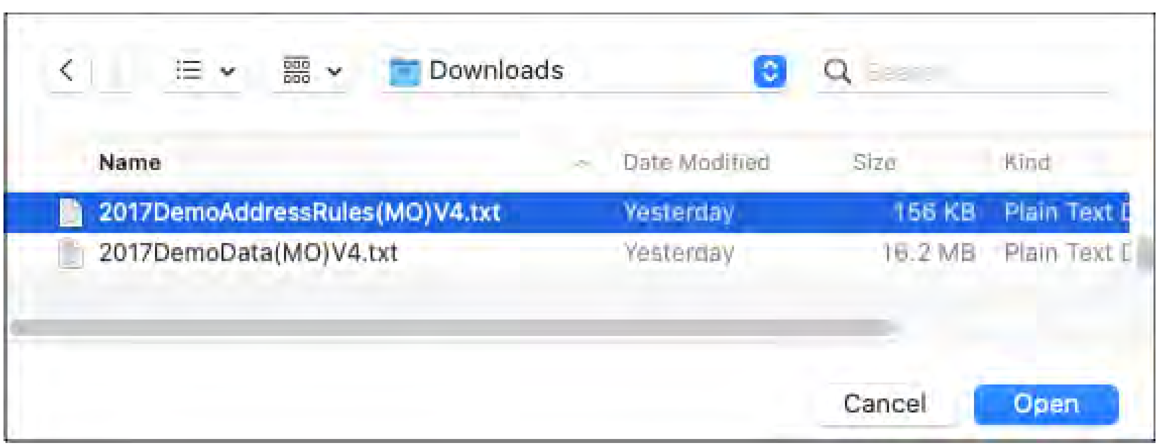
The *Upload Address Import File* page is displayed.

4. Click **Choose a File**.

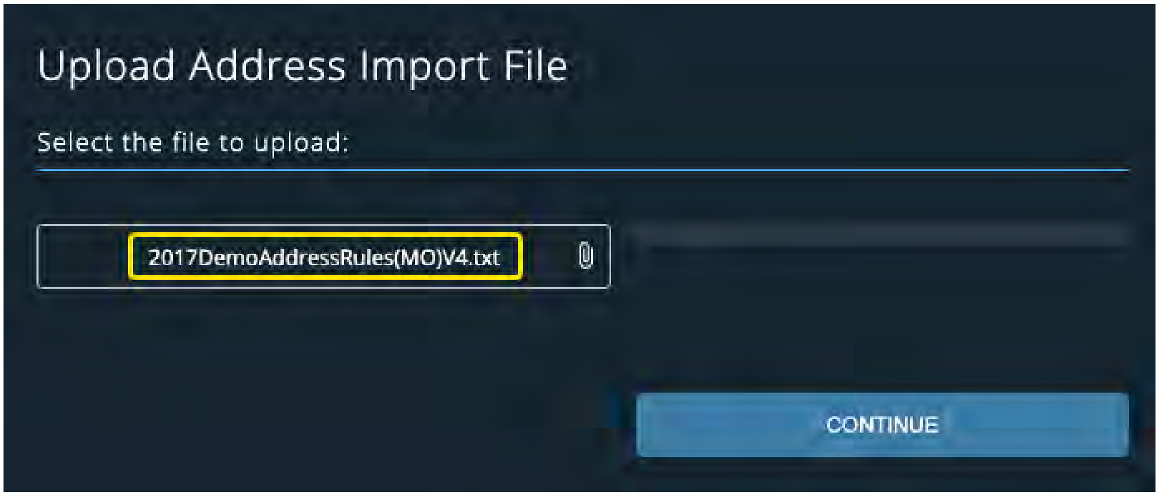


The open file dialog appears.

5. Navigate to the applicable file and double-click it, or highlight it and click **Open**.



The *Choose a File* field is now populated with the uploaded file.



6. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

7. When processing is complete, click **DONE**.

The system returns to the *ELECTION DETAILS* page.

2.1.4 Downloading the Original Voter File

You can download the original voter file for your election from ePulse.
To download the original voter file from the *Election Details* page, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* page is displayed.

2. Click on the current election name.

The *ELECTION DETAILS* page is displayed.

3. Click **DOWNLOAD ORIGINAL VOTER FILE**.

The voter file is downloaded to your computer.

2.1.5 Regenerating the Poll Pad 3 Database

Once ballot style information has been imported successfully, you can regenerate the database. Performing the Regenerate Poll Pad 3 DB steps ensures that the newly added ballots or party ballots are linked correctly to the voters and precincts in the election.

To regenerate the Poll Pad 3 database, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* page is displayed.

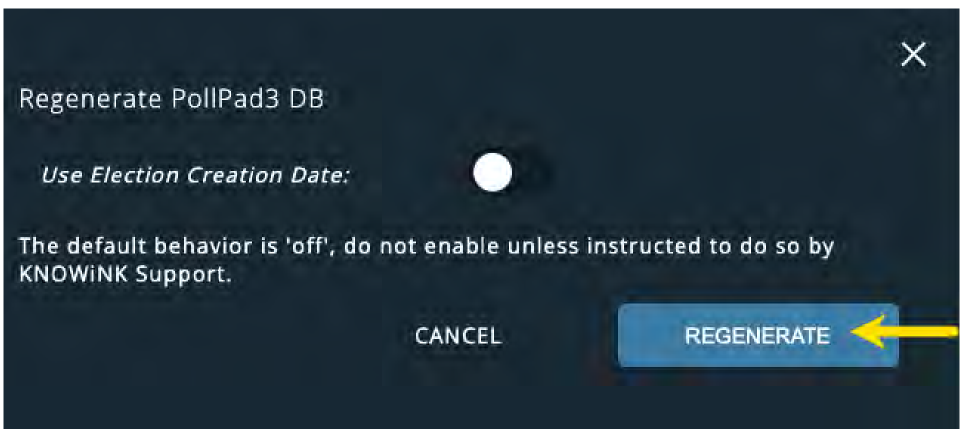
2. Click on the current election name.

The *ELECTION DETAILS* page is displayed.

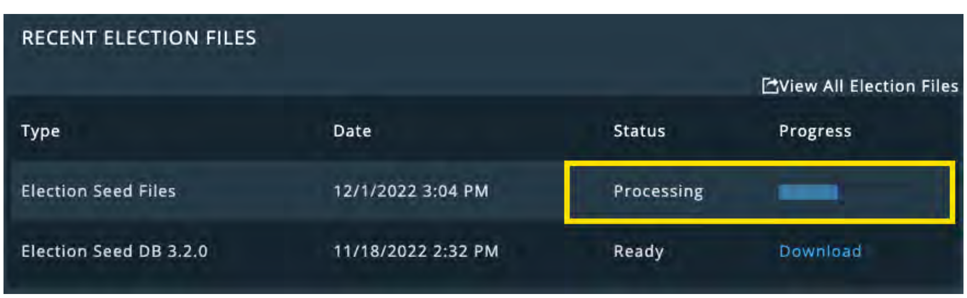
3. Click **Regenerate PollPad3 DB** under the *Tools* heading.

The *Regenerate PollPad3 DB* dialog box appears.

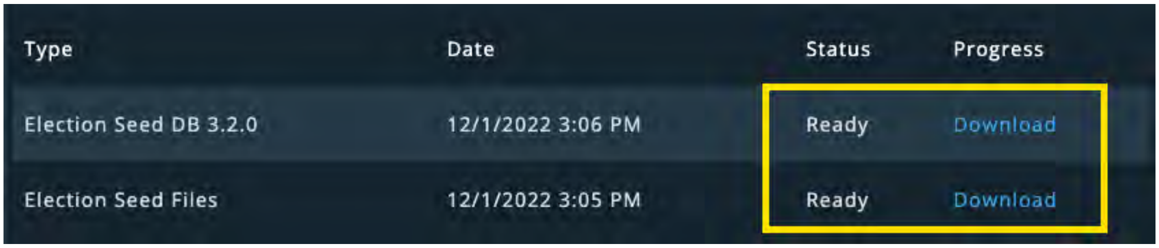
4. Click **REGENERATE**.



5. If a supplemental voter file was previously imported into the election before regenerating the database and only if you have been instructed to do so, toggle ON *Use Election Creation Date*. CAUTION: The toggle defaults to OFF and should only be changed if instructed by support in very specific circumstances.



Ensure both files are completely downloaded before proceeding.



If you previously downloaded the voter files to your Poll Pads, you must reimport the voter files to the Poll Pads to get the updated ballot-style data.

2.2 Managing Groups

Groups in ePulse allow administrators to limit the information available to individual users. Users can be assigned to a polling location and are only permitted to view and edit data relevant to their designated location.

2.2.1 Creating Groups

To create a group, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **GROUPS**.

The *GROUPS* page is displayed.

2. Click **CREATE GROUP**.

The *Group Details* form appears.

3. Enter a name for the Group.
4. Click **SAVE**.

The *GROUPS* page is displayed, and the newly created group is now in the table.

2.2.2 Importing Groups

To import a group, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **GROUPS**.

The *GROUPS* table is displayed.

2. Click **IMPORT GROUPS**.
3. Click **Choose a File**.

The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

6. When the file is done processing, verify that all imported data totals in ePulse are correct.

7. If the imported data counts match your records, click **DONE**.

2.2.3 Configuring an Election Group

To configure a group, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **GROUPS**.

The *GROUPS* table is displayed.

2. Click on the group name to configure.

The *Configure Election Group* page appears.

3. Click to select from the *ADD POLLING PLACE* drop-down list, and click **ADD**. Repeat as necessary.

The selected polling place(s) and their codes are listed.

If no polling places are selected, all polling places will be visible to the Group.

4. Click to select from the *ADD USERS* drop-down list, and click **ADD**. Repeat as necessary.

The selected user(s) and their information is listed. To repeat this process for other groups, navigate to the *GROUPS* screen.

2.2.4 Editing Group Names

To edit a group name, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **GROUPS**.

The *GROUPS* page is displayed.

2. Click the pencil icon in line with the group to edit.

The *Group Details* form appears.

3. Edit the name as needed, and click **SAVE**.

The *GROUPS* page is displayed, and the change is reflected in the table.

2.2.5 Deleting Groups

To delete a group, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **GROUPS**.

The *GROUPS* page is displayed.

2. Click the trash can icon in line with the group to delete.

A dialog asking for confirmation appears.

3. Click **OK**.

<u>CAUTION</u>: Clicking **OK** will immediately delete the group and cannot be undone.

2.3 Managing Parties

The *PARTIES* module in ePulse controls which parties are displayed on the Poll Pad when processing a voter during a Primary Election.

To view the *PARTIES* table, click **ELECTION SETUP** in the left navigation menu and select **PARTIES**. The *PARTIES* table lists the parties, their current status, and any custom labels that have been applied.

2.3.1 Adding a Party

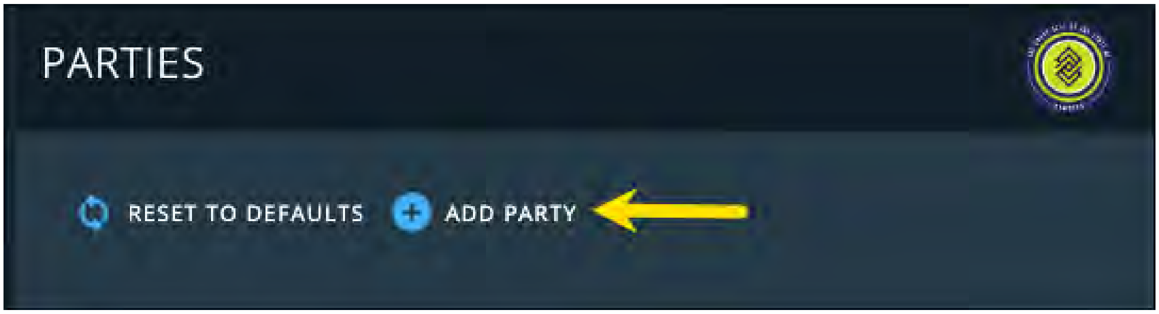
To add parties to a primary election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **PARTIES**.

The *PARTIES* table is displayed.

2. Click the toggle to *Enable Ballot Parties*.

3. Click **ADD PARTY**.



The *ADD PARTY* form appears.

4. Complete the form as follows:
   - *Internal Party Name*
     Enter the name of the party.
   - *Party Abbreviation (Must Be Unique)*
     Enter the unique party abbreviation. Example: DEM
   - *Display Party Name*
     This is how Poll Pad displays the party on the ballot screen and the dropdown for party selection. This is also used in ePulse reports.
   - *Voter Registration Label*
     This allows individual voters to be matched to the relevant party in your Voter Registration System (VRS). Entry here must be an exact match (i.e., capitalization, spelling, abbreviation) to the VRS label.
   - *Voter History Label* (Required)
     This field sets the value that ePulse will provide your VRS upon export of the Voter History information post-election. Entry must match the value your VRS expects for imports (i.e., capitalization, spelling, abbreviation).
   - *Custom Code* (Required for primary elections with peripheral and gateway integrations)
     The *Custom Code* field is required to send the correct voted party label to your voter registration system.
   - *Ignore Party for New Registrations*
     Click to select **No** to allow the choice of a party during a new registration process on Poll Pad or **Yes** to omit party selection.
   - *Ballot Parties*
     Click to select which parties' ballots will be available to the new party.
5. Click **SAVE**.

The *PARTIES* table is displayed, and the new party is listed with its status and labels.

2.3.2 Editing Parties

Internal Name and Party Abbreviation are non-editable fields and won't appear on the *Edit Party* form.

To edit parties, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **PARTIES**.

The *PARTIES* table is displayed.

2. Click the pencil icon in line with the party to edit.

The *Edit Party* form appears.

3. Edit fields as needed and click **SAVE**.

The changes are applied to the party and reflected in the *PARTIES* table.

2.3.2.1 Editing Unaffiliated Ballot Parties

To set ballot parties for voters without a party on file, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **PARTIES**.

The *PARTIES* table is displayed.

2. Click **EDIT UNAFFILIATED BALLOT PARTIES**.
3. Click to select from the *Ballot parties* drop-down list.
4. Click **UPDATE**.

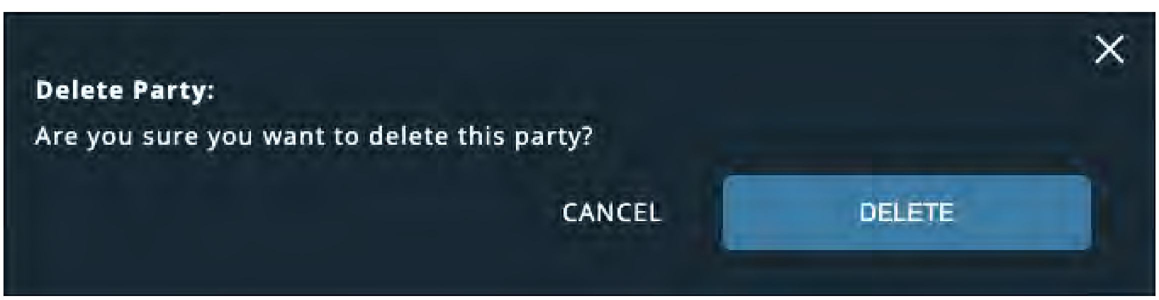
For assistance setting up party logic, please contact Client Services: support@knowink.com.

2.3.3 Deleting Parties

To delete parties from an election, follow these steps:

1. Click the trash can icon in line with the party to delete.

The *Delete Party* dialog appears.



2. Click **DELETE**.

The *PARTIES* table is displayed, and the deleted party has been removed.

2.3.4 Resetting Parties to Defaults

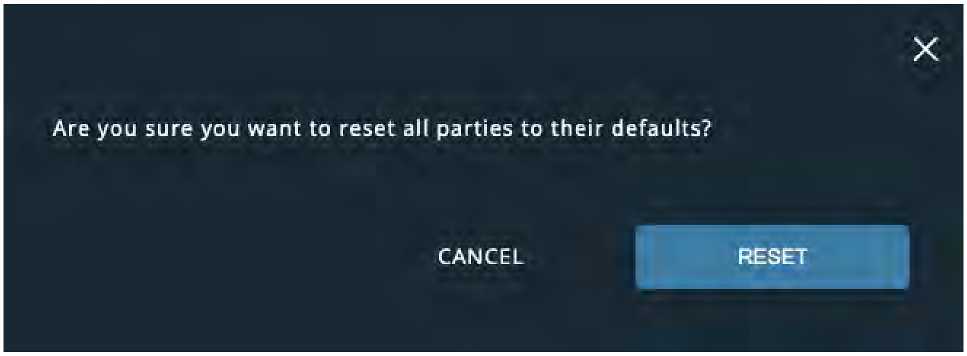
To reset the parties to state defaults, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **PARTIES**.

The *PARTIES* table is displayed.

2. Click **RESET TO DEFAULTS**.

A confirmation dialog appears.



3. Click **RESET**.

The parties are reset.

2.4 Managing Statuses

Administrators can set how voter statuses are displayed and processed on Poll Pads in the *STATUSES* tab of the *ELECTION SETUP* module.

2.4.1 Adding a Status

To add statuses to an election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **STATUSES**.

The *STATUSES* page is displayed.

2. Click **ADD STATUS**.

The *ADD STATUS* form appears.

3. Click to select from the following drop-down menus:
    - *Type*
    - *System name*
      Select a status.
4. Enter a *Custom Name* for the status as you would like it to display on the Poll Pad.
5. Click to select from the following drop-down menus:
    - *Display Voter On Pad*
    - *Color*
      Choose a color to display for voters with this status.
    - *Allowed to Vote*
    - *Confirm ID Scan*
      When enabled, scanning an ID of a voter in that status will take the poll worker to the search results screen instead of bringing the voter up automatically.
    - *Show Status on Search*
6. Click **SAVE**.

2.4.2 Editing a Status

To edit statuses for an election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **STATUSES**.

The *STATUSES* page is displayed.

2. Click the pencil icon in line with the Status to edit.
3. Edit the applicable lines as needed, and click **SAVE**.

The Status is updated, and the change is reflected in the *STATUSES* table.

2.4.3 Deleting Statuses

1. Click **ELECTION SETUP** in the left navigation menu, and select **STATUSES**.

The *STATUSES* page is displayed.

2. Click the trash can icon in line with the Status to delete.

A dialog asking for confirmation appears.

3. Click **OK**.

CAUTION: Clicking **OK** will immediately delete the status and cannot be undone.

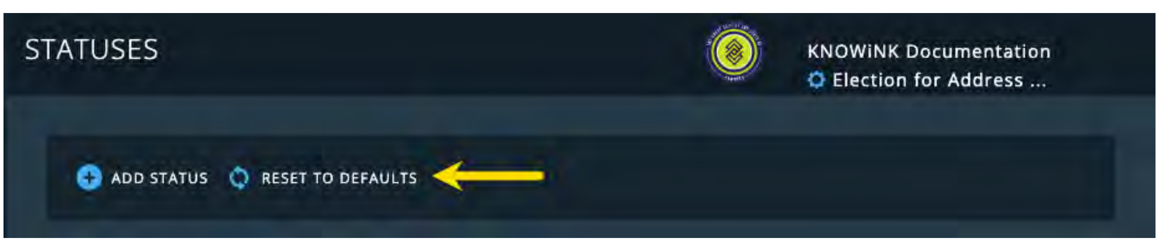
2.4.4 Resetting Statuses to Defaults

To reset the statuses to state defaults, follow these steps:

1. Click ELECTION SETUP in the left navigation menu, and select **STATUSES**.

The *STATUSES* table is displayed.

2. Click **RESET TO DEFAULTS**.



A confirmation dialog appears.

3. Click **RESET**.

The statuses are reset.

2.5 Managing Ballot Styles

To access the *BALLOT STYLES* screen, select **ELECTION SETUP** from the left navigation menu and click **BALLOT STYLES**. The *BALLOT STYLES* page is displayed and shows a list of the unique precincts and ballot styles created for the current election.

As part of pre-election preparations, you must validate the ballot styles functionality in a test election. Partner with KNOWiNK client services and your voting system company to ensure everything works correctly.

2.5.1 Adding Ballot Styles

To add a new precinct and ballot style assignment, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **BALLOT STYLES**.

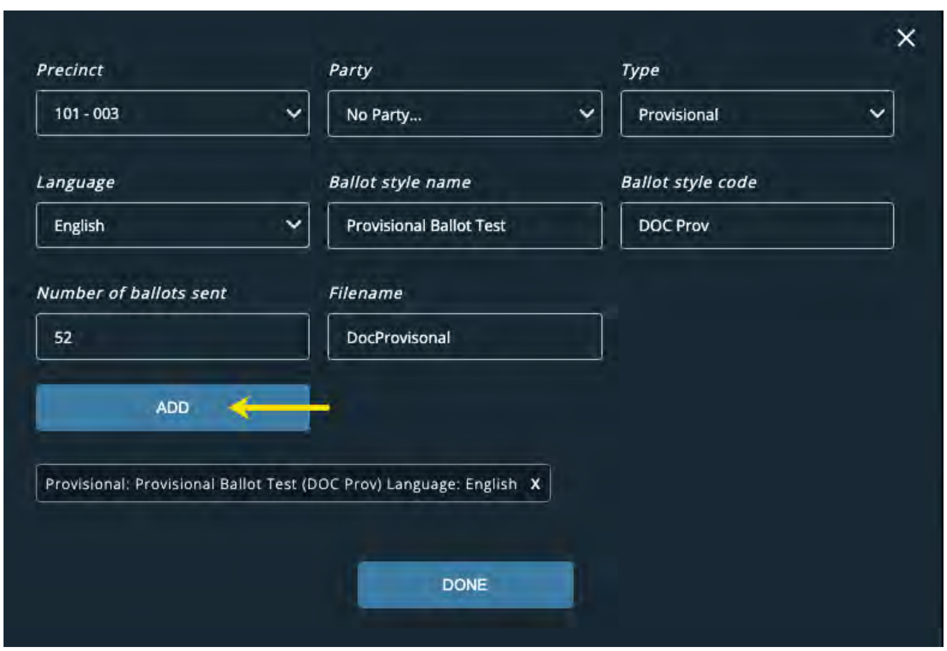
The *BALLOT STYLES* page is displayed.

2. Click **ADD**.

3. Click to select from the following drop-down menus:
   - *Precinct*
   - *Party*
   - *Type*
   - *Language*

4. Type the appropriate information into the following fields:
   - *Ballot style name*
   - *Ballot style code*
   - *Number of ballots sent*
   - *Filename*

5. Click **ADD**.



The ballot style is added.

6. To add more ballot styles, click to select from the appropriate drop-down lists and click **ADD** again. Repeat as necessary.
7. Click **DONE**.

The *BALLOT STYLES* page is displayed.

2.5.2 Downloading a Ballot Style Template

ePulse can generate a template for custom ballot styles to be completed and uploaded back into ePulse. The file includes precincts and splits, along with headers for the fields available for import.

To download a template that can be used to import ballot styles, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **BALLOT STYLES**.

The *BALLOT STYLES* page is displayed.

2. Click **TEMPLATE**.

The template is downloaded to your computer.

	A	B	C	D	E	F	G	H
1	precinct	split	party	ballot_style_	ballot_style_	num_ballots	filename	ballot_type
2	101	1						
3	101	2						
4	201	1						
5	302	1						
6	302	2						

Blank Template

3. Populate the template fields as follows:
   - Precinct
     This field is pre-populated with information from ePulse. Do not edit.
   - Split
     This field is pre-populated with information from ePulse. Do not edit.
   - Party
     Fill in the party abbreviation for a primary election. Leave blank for a general election.
   - Ballot_Style_Name
     Enter the custom ballot style name for the corresponding precinct and split. Example: (121-City) This field displays on the Poll Pad and on the printed ticket, where applicable.
   - Ballot_Style_Code
     Typically corresponds with data entered in the Ballot_Style_Name field. Example:

(121-City) This field should match the ballot style code programmed into your voting machines for the corresponding precinct and split.

- Num_Ballots_Sent
  This field is optional.
- Filename
  This field is optional.
- Ballot_type
  Enter a ballot style as needed. Example: Absentee, Under 18. If left blank, the ballot style will default to Regular.

	A	B	C	D	E	F
1	precinct	split	party	ballot_style_name	ballot_style_code	num_ballots_sent
2	121	BS5		121-City	121-City	
3	121	BS3		121-ISD	121-ISD	
4	122	BS5		122-County	122-County	

Populated Template

4. Save the completed file as a .csv for upload back into ePulse.

2.5.3 Downloading Existing Ballot Styles

To download a copy of the current precinct and ballot style assignments from the BALLOT STYLES page, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **BALLOT STYLES**.

The *BALLOT STYLES* page is displayed.

2. Click **DOWNLOAD**.

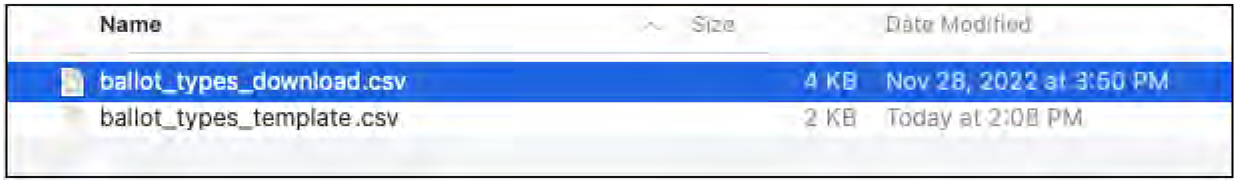
The .csv file is downloaded to your computer.

2.5.4 Importing Ballot Styles

Before importing the CSV file of custom precincts and ballot styles, you must prepare the CSV file.

To prepare and import the ballot styles CSV file, follow these steps:

1. Download the ballot styles file as instructed in *Downloading Existing Ballot Styles*.
2. Import the CSV data into a new workbook in Microsoft Excel. See *Manually opening CSV files in Excel* for more information.



3. Complete the CSV columns as follows:
   i. Verify the information in the *Precinct* and *Split* columns is correct and matches what is in ePulse.
   ii. Enter the ballot style name in column D (ballot_style_name).
   iii. If using Poll Print, enter the PDF file name in column G (filename).

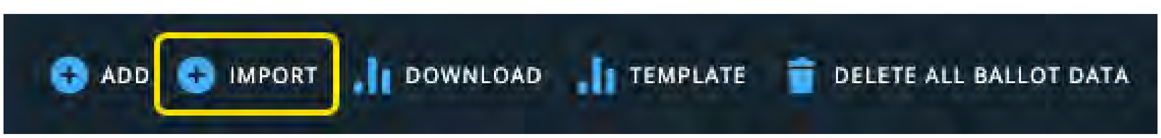
NOTE
The file name column must exactly match the PDF file name and file extension.

Example: PollPad_Sample_Ballot.pdf
(file name including capitalization, special characters, and file extension must match)

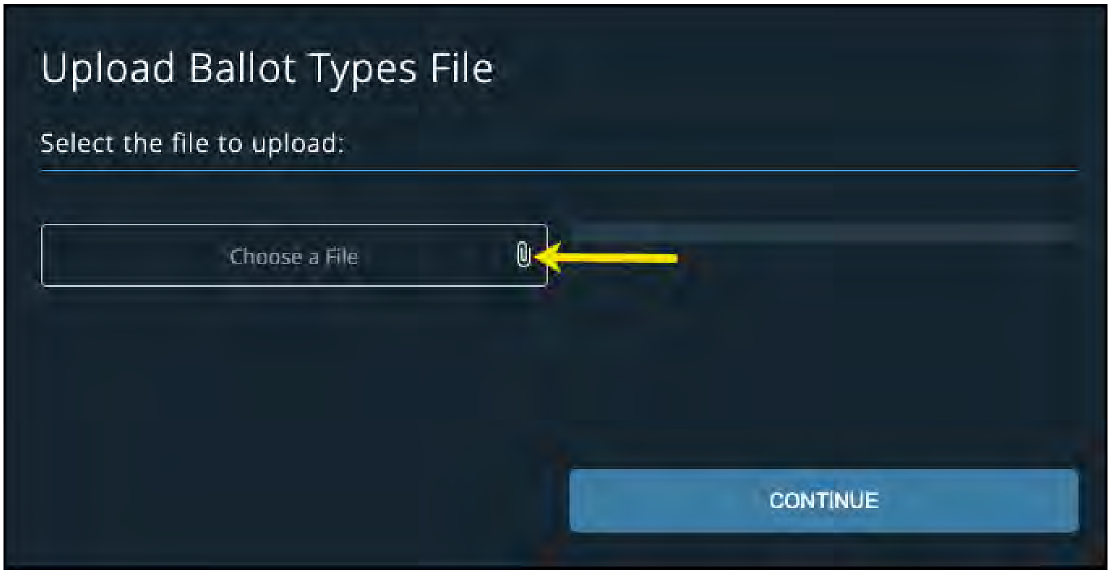
   iv. Enter other ballot data in cells as needed.
4. Save the ballot styles CSV file*.
   *If using Poll Print, move the CSV file into a folder with all of the individual PDF ballot files and zip/compress the folder.
5. In ePulse, click **ELECTION SETUP** in the left navigation menu and select **BALLOT STYLES**.

The *BALLOT STYLES* page is displayed.

6. Click **IMPORT**.

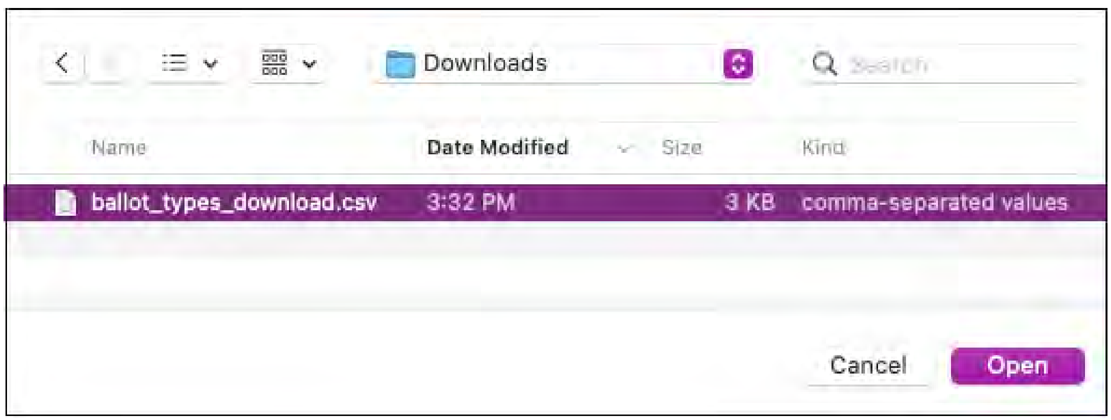


7. Click **Choose a File**.



The open file dialog appears.

8. Navigate to the applicable CSV or ZIP file and double-click it, or highlight it and click **Open**.



The *Choose a File* field is now populated with the uploaded file.

9. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

10. When the file is done processing, verify that all imported data totals in ePulse are correct and click **DONE**.
11. To verify that ePulse has imported all ballot styles and their corresponding PDF images, click on the magnifying glass icon in line with the *Ballot Style* to review.

The *Ballot Images* window appears. Use your browser shortcuts to zoom in or out on the image.

12. Click the **X** to close the *Ballot Images* window.
13. Regenerate the database as instructed in *Regenerating the Poll Pad 3 Database*.

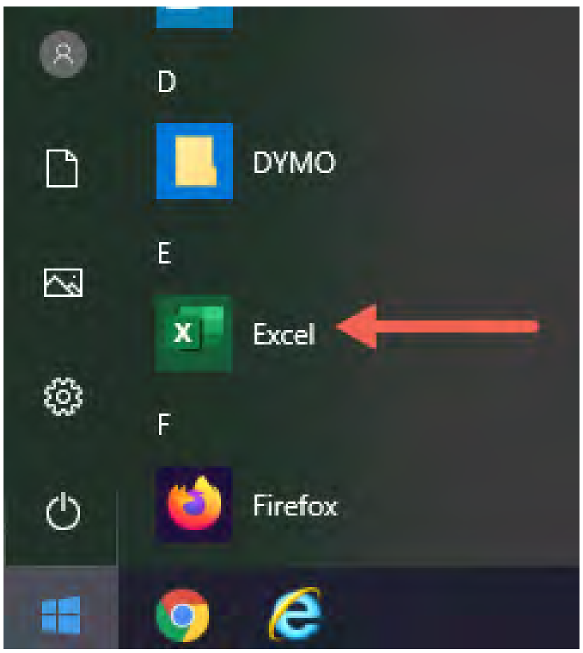
2.5.4.1 Manually opening CSV files in Excel

To save the leading zeros in your CSV file, you must import the file into a blank Microsoft Excel workbook.

These instructions were created using Microsoft Office 365 on Windows 10. Instructions may vary by the operating system and version.

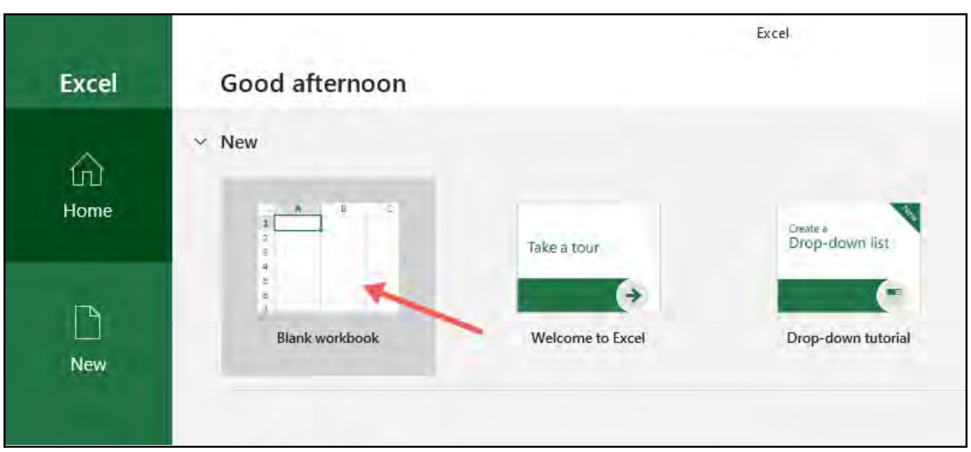
To import a CSV file in Microsoft Excel, follow these steps:

1. To open the start menu, click **Start**  on the desktop.
2. Select **Excel** from the menu.



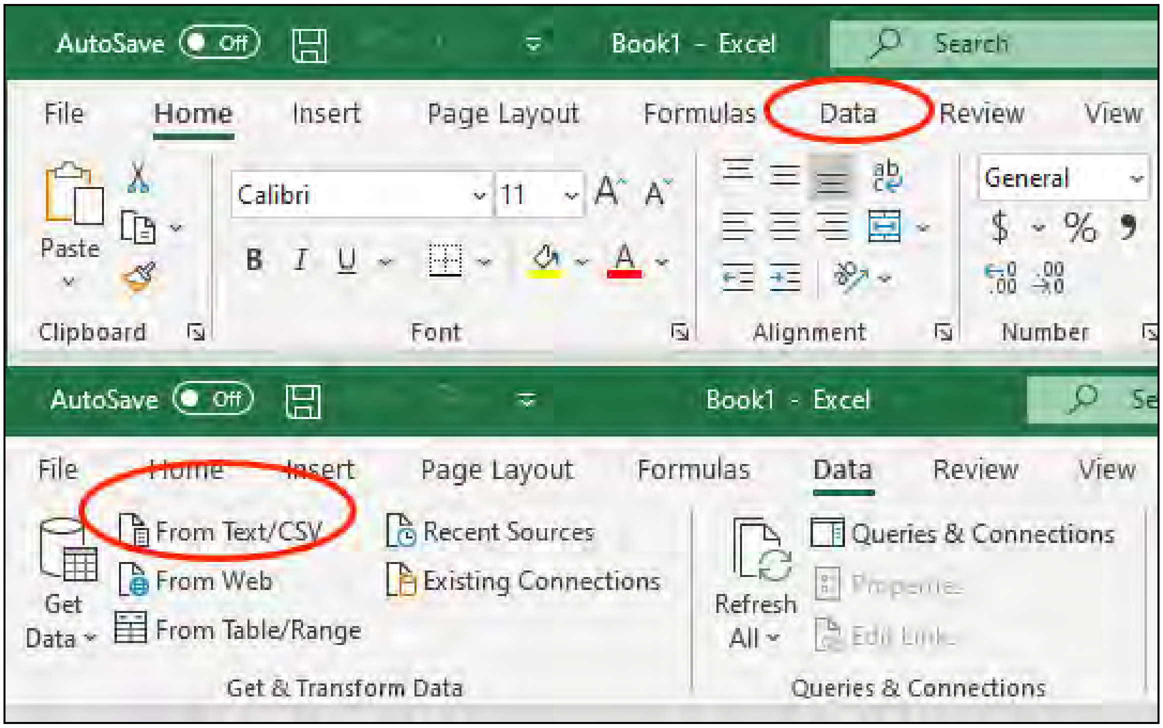
The *Excel* application opens.

3. Double-click on the **Blank workbook** icon.



A blank workbook is opened.

4. Click on the **Data** tab, and select *From Text/CSV*.



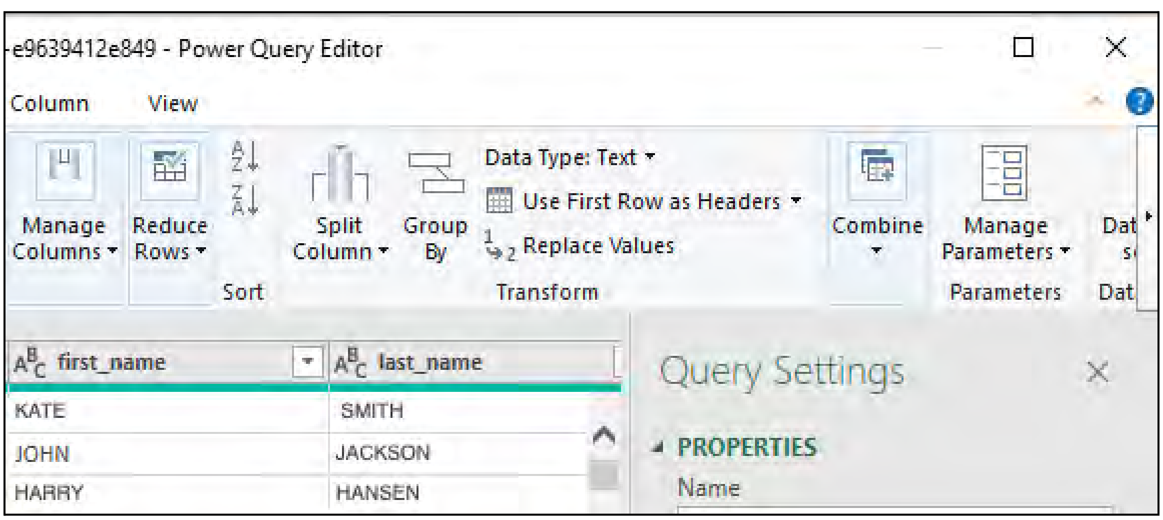
The *Import Data* window is displayed.

5. Navigate to the location of the .csv file and double-click it.

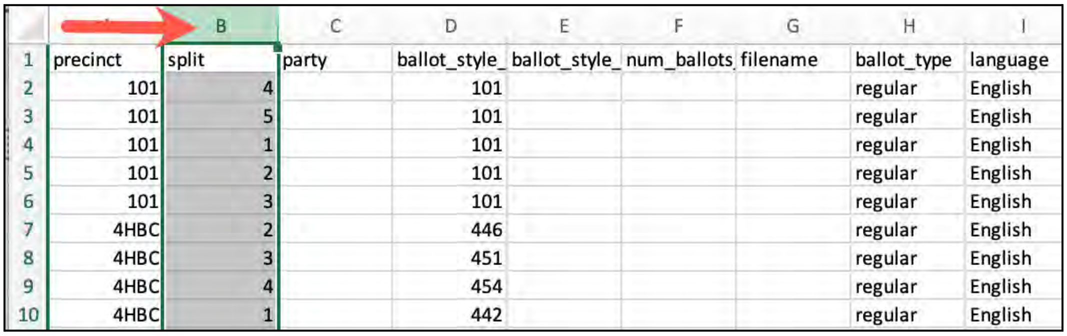
The file is opened in *Excel*, and the data has been separated into columns.

6. Click **Transform Data**.

The *Power Query Editor* is displayed.

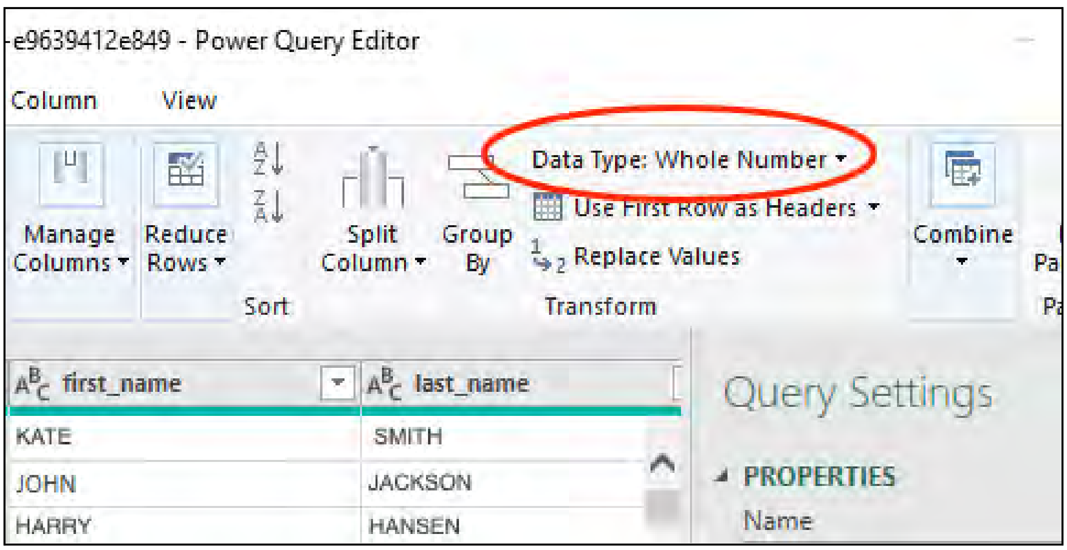


7. Scroll to locate the column containing the numbers with the missing zeros, and click on the header to select the column.

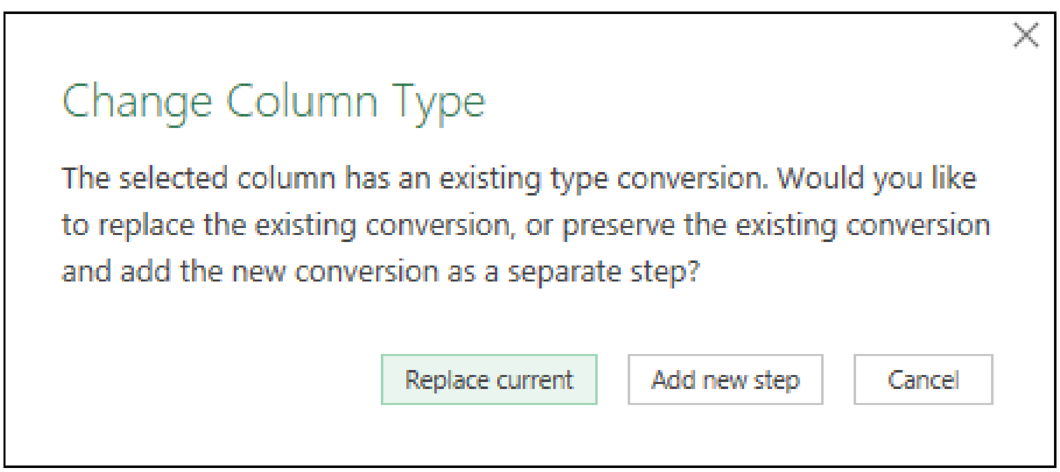


	A	B	C	D	E	F	G	H	I
1	precinct	split	party	ballot_style_	ballot_style_	num_ballots	filename	ballot_type	language
2	101	4		101				regular	English
3	101	5		101				regular	English
4	101	1		101				regular	English
5	101	2		101				regular	English
6	101	3		101				regular	English
7	4HBC	2		446				regular	English
8	4HBC	3		451				regular	English
9	4HBC	4		454				regular	English
10	4HBC	1		442				regular	English

8. From the menu, click to select **Text** from the *Data Type* drop-down menu.



The *Change Column Type* dialog box is displayed.



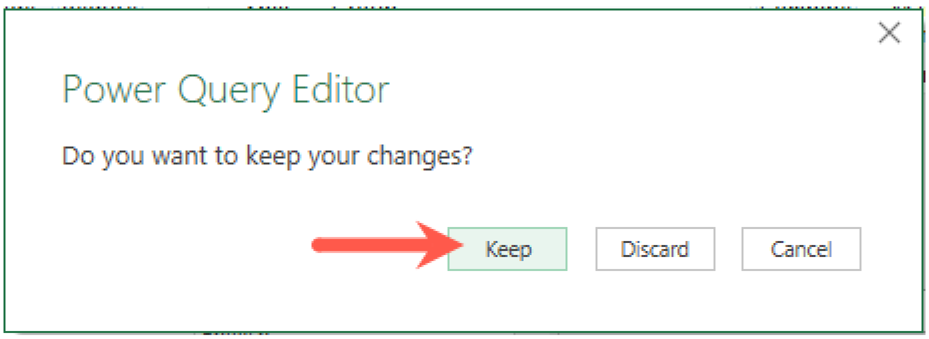
9. Click **Replace current**.

The leading zeros are revealed in the selected column.

10. Repeat these steps for any columns that have lost leading zeros.
11. When complete, click the **X** to close the *Power Query Editor*.

A dialog requesting confirmation appears.

12. Click **Keep** to save the changes.

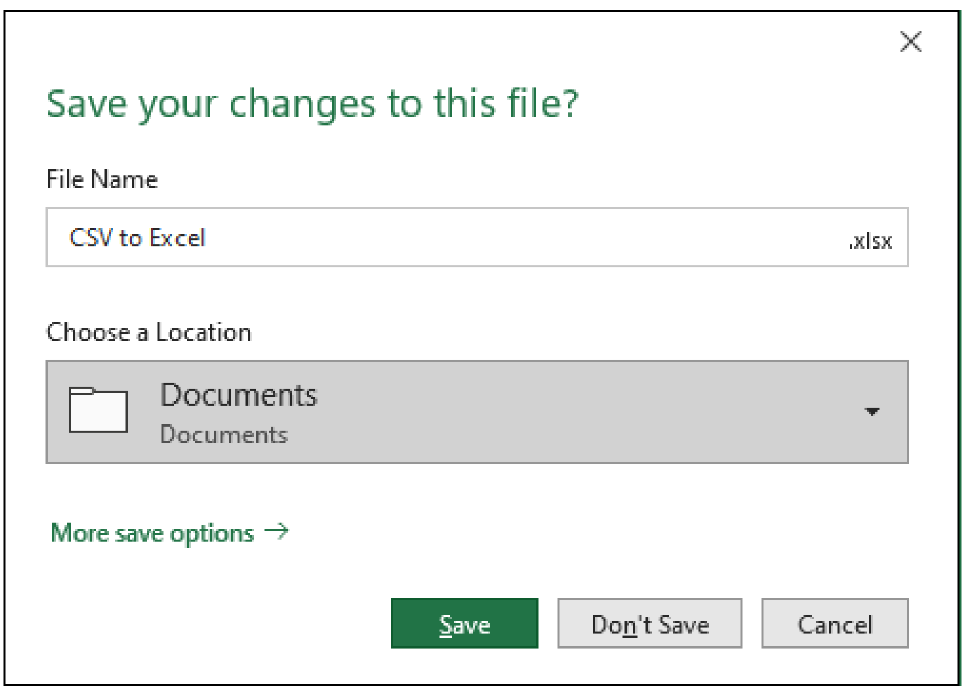


The workbook is populated with the CSV data and includes the leading zeroes.

13. Click the **X** to close the workbook.

A dialog box is displayed to save the workbook.

14. Name the file and click **Save**.



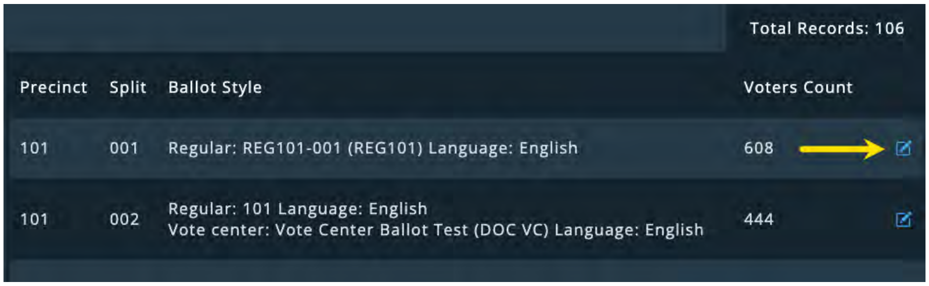
2.5.5 Editing Ballot Styles

To edit a specific Ballot Style, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **BALLOT STYLES**.

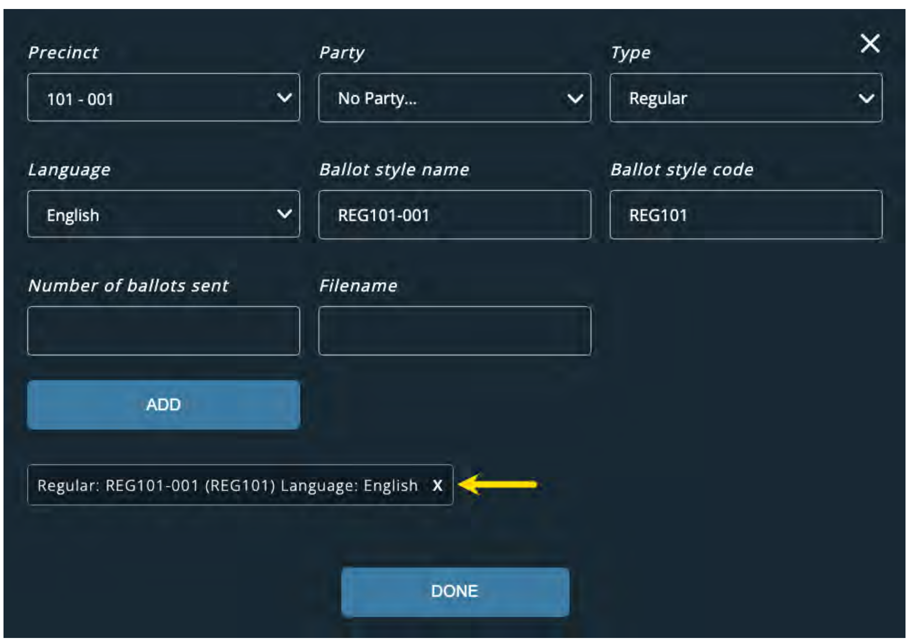
The *BALLOT STYLES* page is displayed.

2. Click the pencil icon in line with the Ballot Style to edit.



3. Click to edit the selections in the drop-down menus:
    - *Precinct*
    - *Party*
    - *Type*
    - *Language*
4. Type to edit the information in the following fields:
    - *Ballot style name*
    - *Ballot style code*
    - *Number of ballots sent*
    - *Filename*
5. Click **ADD**.

The changes are reflected in the ballot style listing.



6. Click **DONE**.
   The *BALLOT STYLES* page is displayed, and the edits are shown in the Ballot Styles table

2.5.6 Deleting the Ballot Data

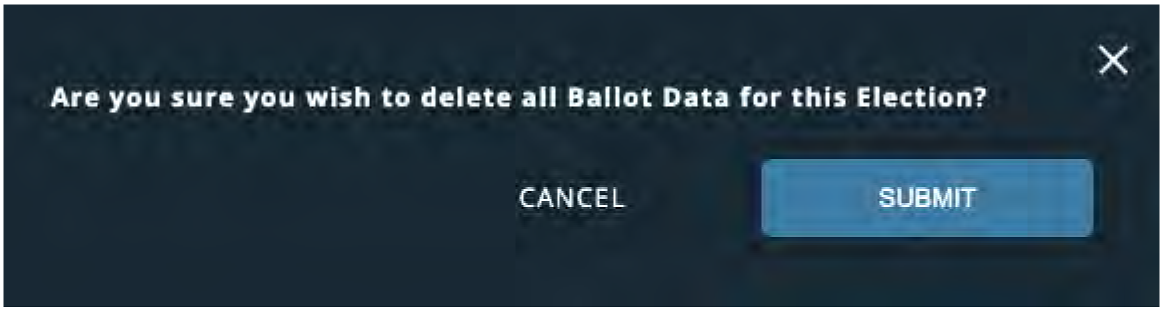
To delete all the Ballot Data for the selected election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **BALLOT STYLES**.

The *BALLOT STYLES* page is displayed.

2. Click **DELETE ALL BALLOT DATA**.

A dialog appears requesting confirmation.



3. Click **SUBMIT**.

CAUTION: Clicking **SUBMIT** will delete all Ballot Data for the selected election and cannot be undone.

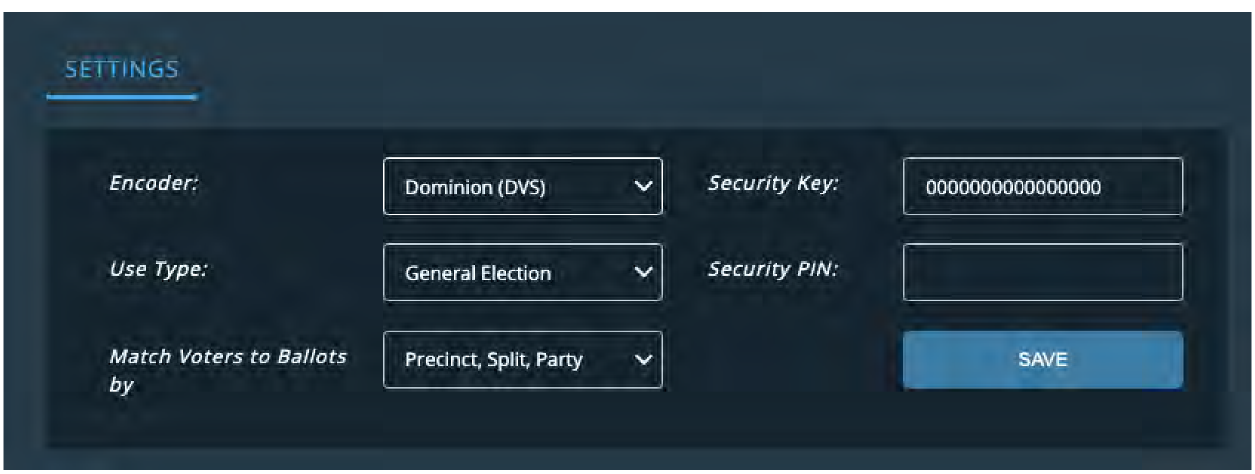
A confirmation message is displayed.

2.6 Configuring the Voter Card Encoder

2.6.1 The Settings Tab

1. Click **ELECTION SETUP** in the left navigation menu, and select **VOTER CARD ENCODER**.

The *SETTINGS* tab of the *CARD ENCODER OPTIONS* page is displayed.



2. Select from the following drop-down menus:
   - *Encoder*
   - *Use Type*

- *Match Voters to Ballots by*

3. Enter the *Security Key*.
4. Click **SAVE**.

2.7 Creating a Database in Training Mode

Training Mode allows you to practice election day scenarios in a non-live environment. You can use it for testing, practice, and poll worker training.

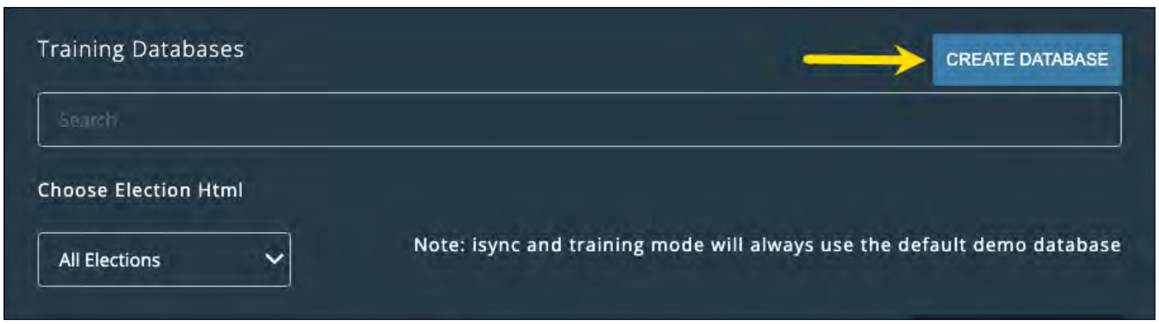
At least one election must be built in ePulse to use Training Mode. See *Creating an Election* for more information.

To create a training database, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **TRAINING MODE**.

The *TRAINING MODE* page is displayed.

2. Click **CREATE DATABASE**.



The *Create Training Database* form appears.

3. Complete the form as follows:
    a. *Name*
    Enter a name for the training database.
    b. *Choose Election*
    Click to select an election from the drop-down list.
    c. *Count of Voters*
    The field auto-populates based on your selection but can be adjusted as needed.
    d. *Poll Pad Configuration*
    Click to select from the drop-down list.
    e. *Polling Place*
    Auto-populates based on your selection but can be edited as needed.
    f. Optional: Toggle on *Include Sample Voters* to add them to the training mode database.
4. Click **SAVE**.

A confirmation message is displayed, and the new database appears in the *Training Databases* table.

2.7.1 Editing a Training Database

To edit a group name, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **TRAINING MODE**.

The *TRAINING MODE* page is displayed.

2. Click the pencil icon in line with the database to edit.

A database editing form appears.

3. Edit the fields as needed.
4. Click the *Make Default Database for Election* toggle off or on.
5. Click **SAVE**.

The changes are applied, and the *TRAINING MODE* page is displayed.

2.7.2 Deleting a Training Database

You cannot delete a database that is the default *Demo Database*. To delete any other databases, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **TRAINING MODE**.

The *TRAINING MODE* page is displayed.

2. Click the trash can icon in line with the database to delete.

A dialog asking for confirmation appears.

3. Click **OK**.

<u>CAUTION</u>: Clicking **OK** will immediately delete the database and cannot be undone.

A confirmation message is displayed.

Table of Contents

3.0 Managing Polling Places

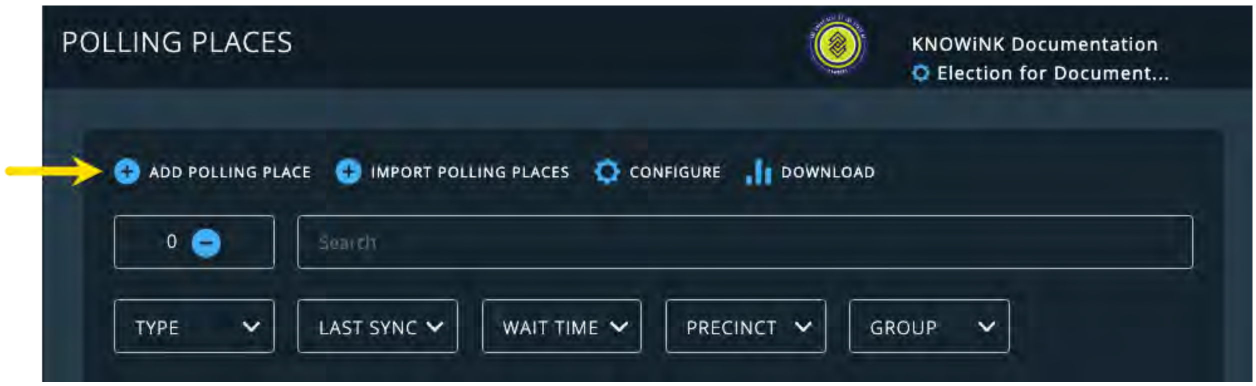
Precinct-specific polling places allow for the assignment of individual precincts and splits to a polling place. All voters within the assigned precincts are allowed to vote. All other precincts and splits will be labeled *Wrong Precinct*. Early Absentee polling places and Vote Centers allow all voters, jurisdiction-wide, to be processed, and no voters are labeled *Wrong Precinct*.

3.1 Adding Individual Polling Places

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click **ADD POLLING PLACE**.



The *NEW POLLING PLACE* form appears.

3. Complete the *POLLING PLACE* information fields. The *Name*, *Code, & Type* fields are required.
4. Click **SUBMIT**.

A confirmation message is displayed.

3.2 Adding Polling Places in Bulk

If your voter registration system provides a file of polling places, you can import it into ePulse to add polling places in bulk. See *Creating a Polling Place File* if your VRS does not provide a file for import.

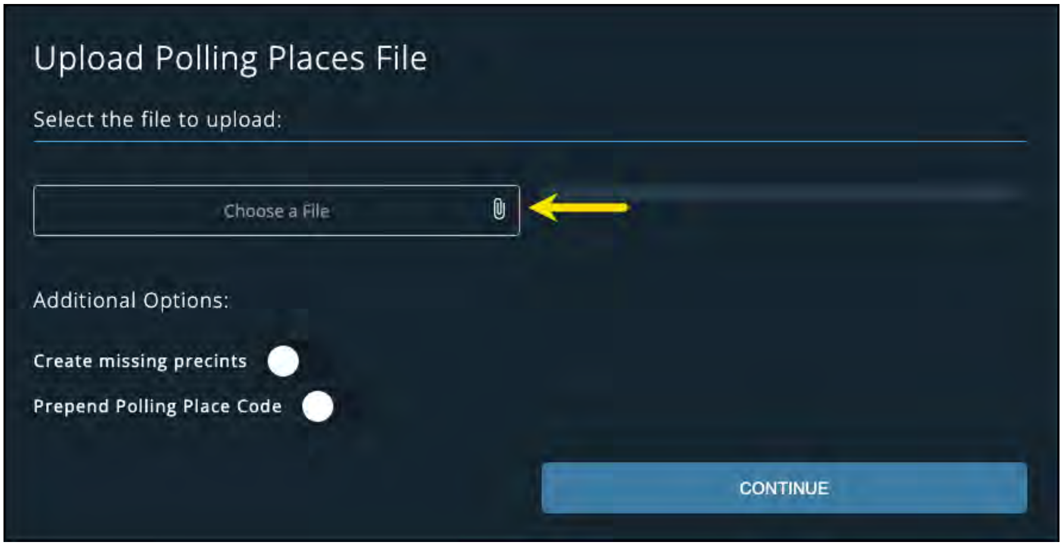
3.2.1 Importing a Polling Place File

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click **IMPORT POLLING PLACES**.

3. Click **Choose a File**.



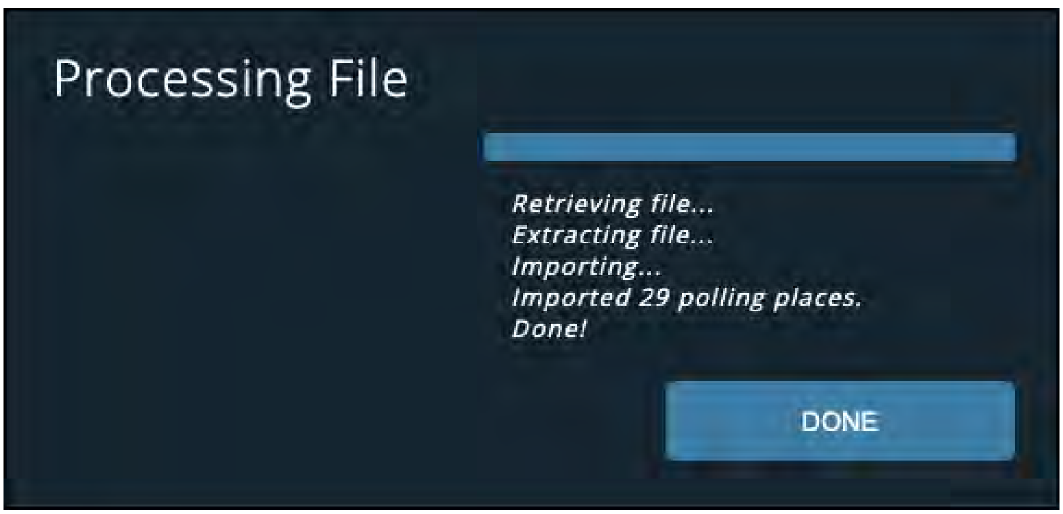
The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.



6. When the file is done processing, verify that all imported data totals in ePulse are correct.
7. If the imported data counts match your records, click **DONE**.
8. Verify the polling places were imported.

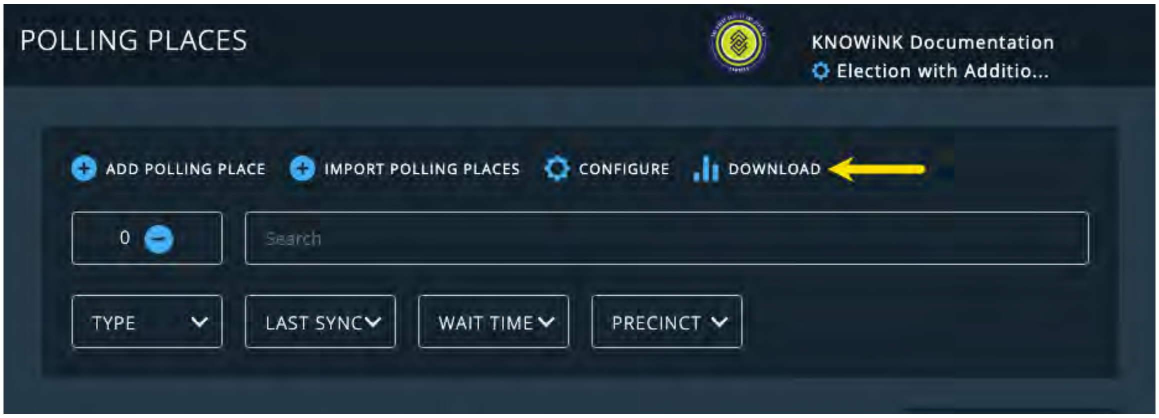
3.2.2 Creating a Polling Place File

If your voter registration system does not provide a file of polling places, you can create one by downloading a template, populating the polling place information, and importing it into ePulse.

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click **DOWNLOAD**.

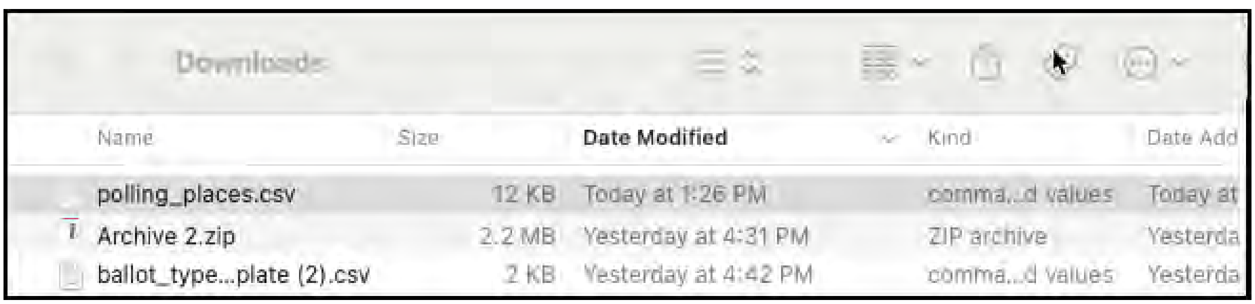


The *Generating CSV…* dialog box appears.

3. Click **DOWNLOAD**.

The *polling_places.csv* file downloads to your computer.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.



5. Replace the template values with those for your polling places.
   - Code
     This field is pre-populated with information from ePulse or your VRS when adding locations. The polling place code must be unique.
   - Name
   - Address Line 1
     Enter the street address of the polling place.
   - Address Line 2
     Enter the secondary address of the polling place, e.g., Apartment # or Unit.

- City
- State
- Zip
- Type
  Enter VC if the polling place is a Vote Center. Enter PS if the polling place is Precinct Specific.
- Active
  A polling place can be Active or Inactive.
- Phone
- Precinct
  Enter the precinct at the polling place. Each precinct is listed on individual rows.
- Split
  Enter the split at the polling place. Each split is listed on individual rows.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Code	Name	Address Line 1	Address Line 2	City	State	Zip	Type	Active	Phone	Precinct	Split
2	101	Busch Stadium	700 Clark Avenue		St. Louis	MO	63102"	PS	Active		BS	2
3	101	Busch Stadium	700 Clark Avenue		St. Louis	MO	63102"	PS	Active		BS	3
4	101	Busch Stadium	700 Clark Avenue		St. Louis	MO	63102"	PS	Active		BS	1
5	114	Butterfly House	15193 Olive Blvd		Chesterfield	MO	63017"	PS	Active		BH	5
6	114	Butterfly House	15193 Olive Blvd		Chesterfield	MO	63017"	PS	Active		BH	1
7	114	Butterfly House	15193 Olive Blvd		Chesterfield	MO	63017"	PS	Active		BH	2
8	114	Butterfly House	15193 Olive Blvd		Chesterfield	MO	63017"	PS	Active		BH	3
9	114	Butterfly House	15193 Olive Blvd		Chesterfield	MO	63017"	PS	Active		BH	4

6. Save the file.
7. Click the **X** to close the *Generating CSV…* dialog box in ePulse.

3.3 Searching for Polling Places

You can search for polling places using a variety of filters.

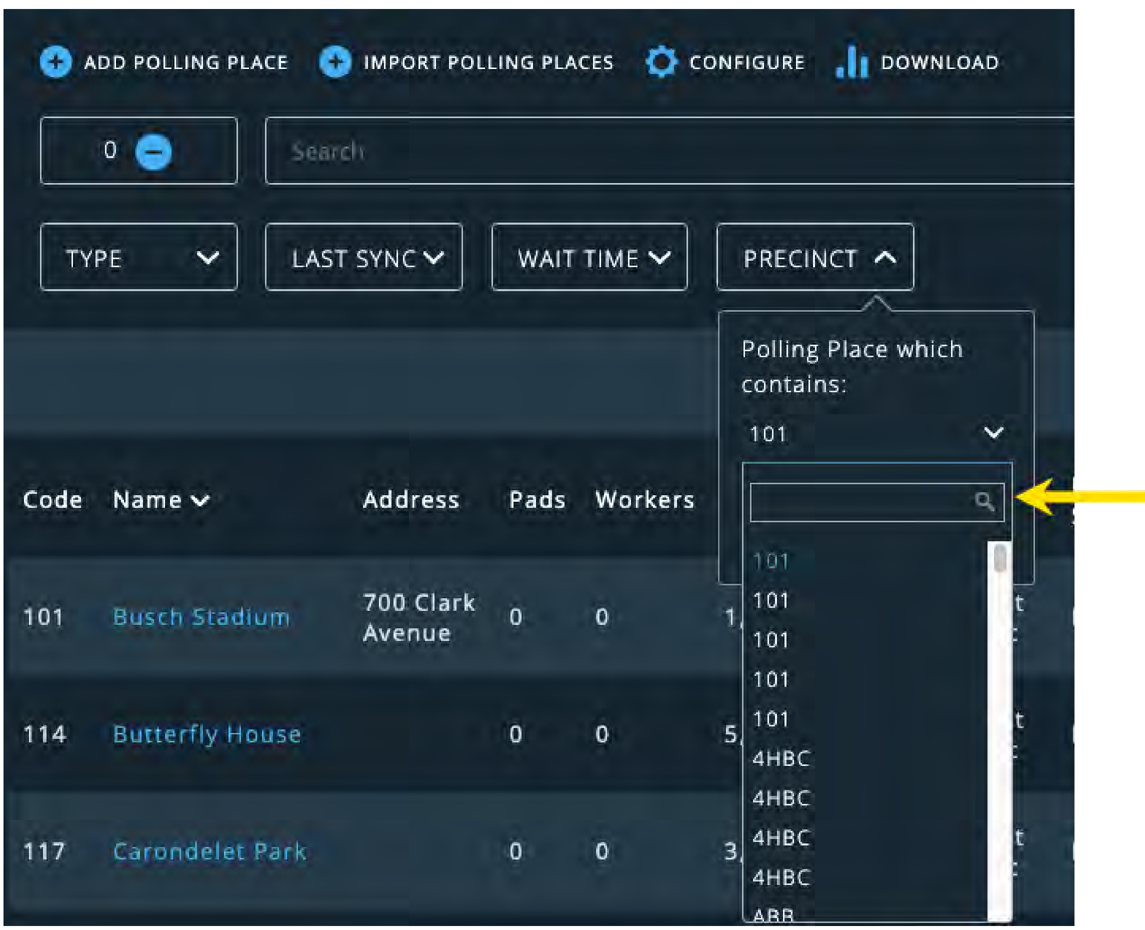
To search for polling places, follow these steps:

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Choose from the following options:
   - Type the name of the polling place in the *Search* box.
   - Click to filter by *TYPE*, select from the drop-down list, and click **APPLY FILTERS**.
   - Click *LAST SYNC* and follow these steps:
     - Click to select *Did sync* or *Did not sync.*
     - Click to select from the following:
       - *minutes ago*
       - *hours ago*
       - *days ago*
       - *weeks ago*

    - Type the number of minutes, hours, days, or weeks.
    - Click **APPLY FILTERS**.
- Click to filter by *WAIT TIME* and follow these steps:
    - Select from the following:
        - Equal To
        - More Than
        - Less Than
    - Enter the number that correlates to your wait time selection.
    - Click **APPLY FILTERS**.
- Click to filter by precinct code, and follow these steps:
    - Click to either select from the drop-down list or enter the code in the search field.



    - Click **APPLY FILTERS**

The *POLLING PLACES* table is updated to reflect the search results based on your selected criteria.

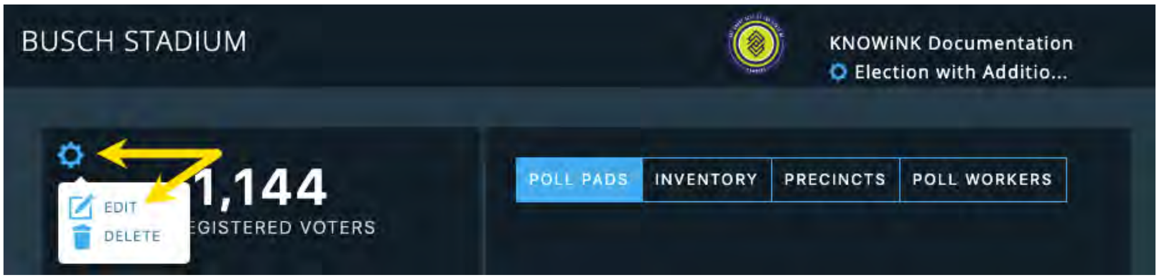
3.4 Editing Polling Places

To edit polling place information, follow these steps:

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click the name of the polling place to edit.
3. Click the **Gear** icon, and select **Edit**.



The *EDIT POLLING PLACE* screen is displayed.

4. Type to edit the information in any of the fields.
5. Click **SUBMIT**.

A confirmation message appears.

3.5 Assigning Precincts to Polling Places

A precinct can only be assigned to one polling place, but precincts can be assigned to a different polling place by moving them. You can assign/move precincts from the *CONFIGURE POLLING PLACES* page or the *PRECINCTS* tab of the Polling Place details page.

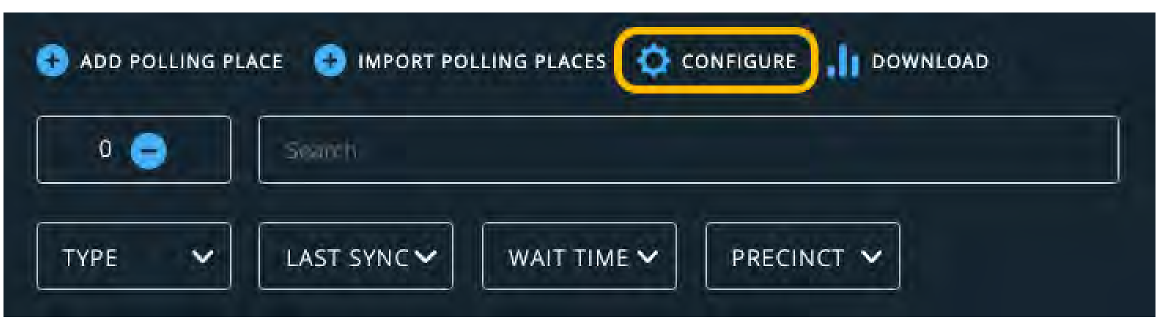
3.5.1 Assigning from the Configure Polling Places Page

To assign or move a polling place from the Configure Polling Places page, follow these steps:

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click **CONFIGURE**



The *CONFIGURE POLLING PLACES* page is displayed.

3. Click the expander arrow in line with the appropriate polling place.

The assigned precincts are displayed.

4. Click in the *Add Precinct* field, and type the precinct code to assign to this polling place. The system will display a list of matching or similar precinct codes as you type. Selecting from the list will auto-populate the field.

The precinct is now assigned to the selected polling place.

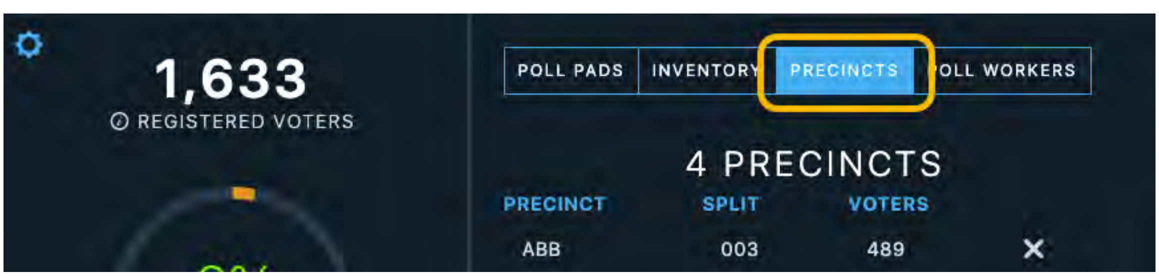
3.5.2 Assigning from the Polling Place Details Page

To assign or move a polling place from the Polling Places details page, follow these steps:

1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.

2. Click the name of the polling place.
3. Click the **PRECINCTS** tab.



The assigned precincts are displayed.

4. Click in the *Add Precinct* field, and type the precinct code to assign to this polling place. The system will display a list of matching or similar precinct codes as you type. Selecting from the list will auto-populate the field.

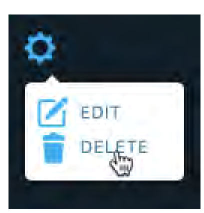
The precinct is assigned to the selected polling place.

3.6 Deleting Polling Places

To edit polling place information, follow these steps:

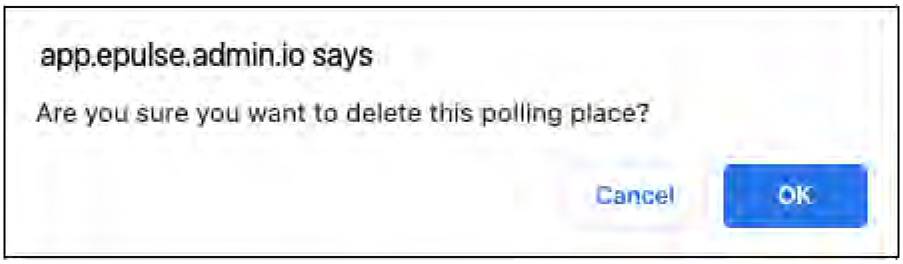
1. Select **POLLING PLACES** from the left navigation menu.

The *POLLING PLACES* page is displayed.



2. Click the name of the polling place to edit.
3. Click the **Gear** icon, and select **Delete**.

A dialog asking for confirmation appears.



4. Click **OK**.

A confirmation message is displayed.

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4.0 Managing Poll Workers

The Poll Worker component allows users to perform the following tasks:

- Manage poll workers and their assignments
- Download a poll worker template
- Import poll workers
- Export poll workers
- Set up poll worker roles
- Create classes for poll worker training
- Copy poll workers from another election to the current election

If you manage poll worker data in ePulse, importing the voter file for your election to Poll Pads includes the poll worker data. Before importing a live election into Poll Pads, you must set up and verify all poll worker information.

4.1 Creating Roles for Poll Workers

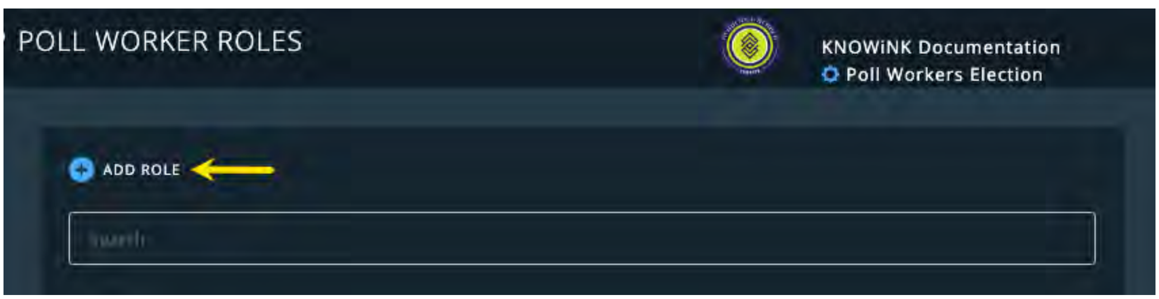
Roles define the positions available for poll workers in an election. Roles must be created and verified before adding your poll workers.

To create roles for poll workers, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **ROLES**.

The *POLL WORKER ROLES* page is displayed.

2. Click **ADD ROLE**.



The new role form appears.

3. Complete the following fields, per your jurisdiction's guidelines:

   - *Name*
     Enter the role name (Required)
   - *Default Role*
     Click the toggle to set it as the default. A default role is assigned to any poll worker added manually or imported who does not have a role assignment.
   - *Rate*
     Enter the pay rate for the role
   - *Rate Type*
     Click to select **Flat** or **Hourly**

- *Max hours for hourly pay rate*
  Enter the maximum hours allowed

4. Click **SAVE**.

The Role appears in the *POLL WORKER ROLES* table.

4.1.1 Searching for Poll Worker Roles

To locate and view poll worker roles, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **ROLES**.

The *POLL WORKER ROLES* page is displayed.

2. Enter the name of the role in the *Search* box.

The *POLL WORKER ROLES* table automatically updates as you enter the search criteria

4.1.2 Editing Poll Worker Roles

To edit poll worker roles, follow these steps:

1. Locate the role to edit as instructed in *Searching for Poll Worker Roles*.
2. Click the pencil icon in line with the role to edit.

The edit roles form appears.

3. Update the fields as needed, and click **SAVE**.

The *POLL WORKER ROLES* table is displayed, and the changes are applied to the role.

4.1.3 Deleting Poll Worker Roles

To delete poll worker roles, follow these steps:

1. Locate the role to delete as instructed in *Searching for Poll Worker Roles*.
2. Click the trashcan icon in line with the role to delete.

3. Click **OK**.
   CAUTION: Clicking **OK** will immediately delete the role and cannot be undone.

If you try to delete the default role, you will see the following message:

Could not delete the selected role because it is the default role. Choose a new default and try again.

4. To set a different role as the default, see *Editing Poll Worker Roles*.

4.2 Adding Poll Workers

Poll Workers can be added individually, copied from another election, imported using a template, or imported with the voter files when building an election if they are included in the VR files used to create the election.

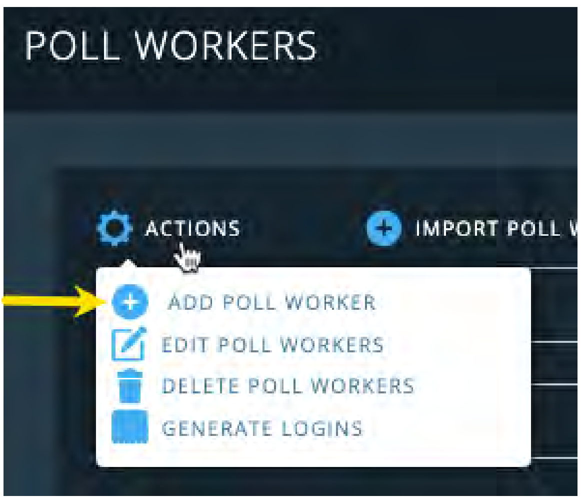
4.2.1 Adding Poll Workers Individually

To add a poll worker, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

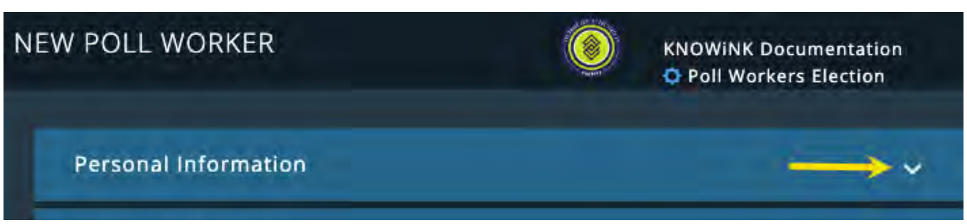
The *POLL WORKERS* page is displayed.

2. Click **ACTIONS**, and select **ADD POLL WORKER**.



The *NEW POLL WORKER* page is displayed.

3. Click the expander arrow (⌄) for each of the following sections and complete the fields:



- *Personal Information*
  First Name, Last Name, and Status are required.
- *Address Information*
- *Mailing Address*
- *Phone*
- *Poll Pad Login*

4. Click **SUBMIT**.

4.2.2 Importing a Poll Worker File

You can import a CSV file of Poll Worker data into ePulse to add poll workers in bulk. See *Creating a Poll Worker File* if you do not have a file for import.

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

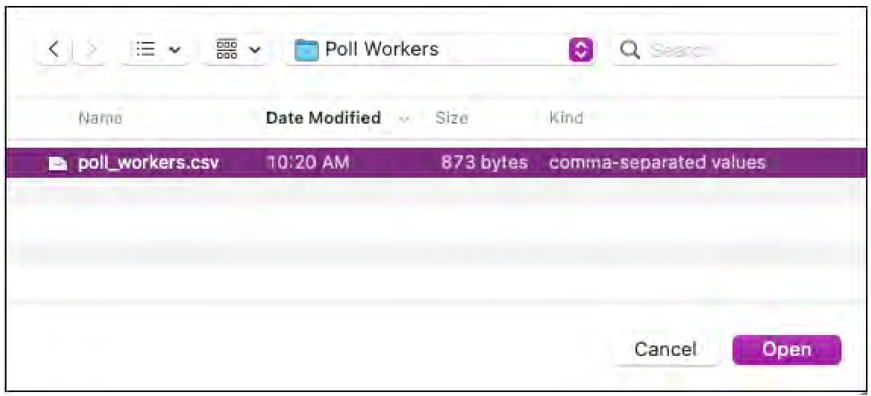
The *POLL WORKERS* page is displayed.

2. Click **IMPORT POLL WORKERS**.

The *Upload Poll Workers File* page appears.

3. Click **Choose a File**.

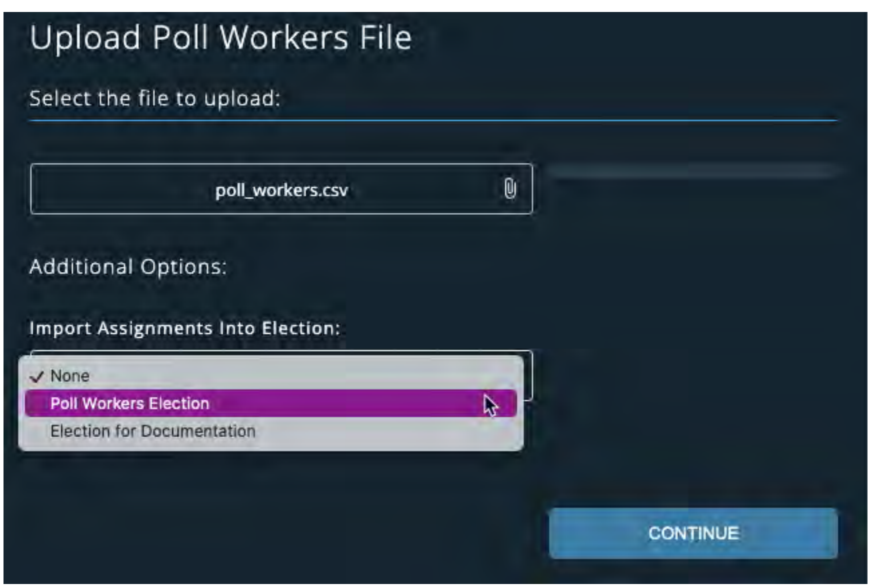
The open file dialog appears.



4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

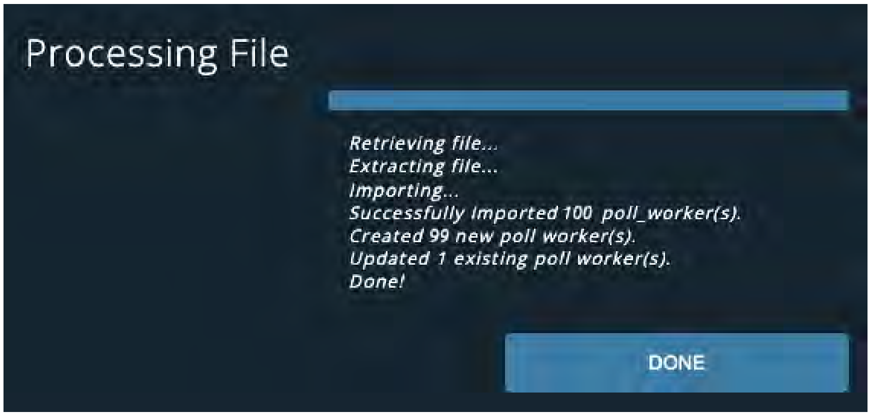
The *Choose a File* field is now populated with the uploaded file.

5. Optional: Click to select an election from the *Import Assignments Into Election* drop-down list.



6. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.



7. When the file is done processing, verify that all imported data totals in ePulse are correct.
8. If the imported data counts match your records, click **DONE**.

The poll workers appear in the *POLL WORKERS* table.

4.2.3 Creating a Poll Worker File

You can create a poll worker File for import by downloading and populating a template or exporting existing poll workers.

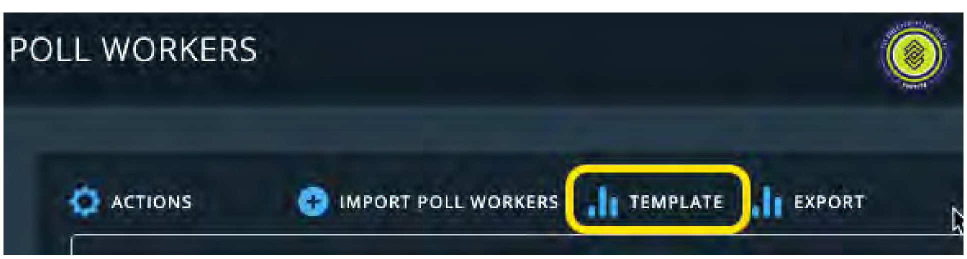
4.2.3.1 Downloading a Poll Worker Template

You can create a poll worker file for import by downloading a template and populating the poll worker information.

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

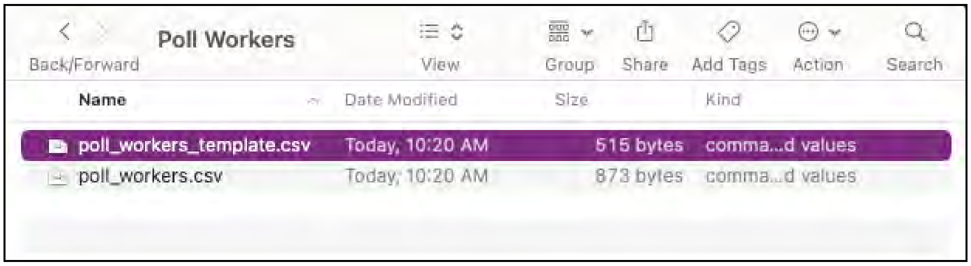
The *POLL WORKERS* page is displayed.

2. Click **TEMPLATE**.



The *poll_workers_template.csv* file downloads to your computer.

3. Navigate to the applicable file and double-click it to open.



4. Replace the template values with those for your poll workers. The following columns are required:
   - *Id* (Identifier)
     Every poll worker must have a unique identifier. It can be their voter ID, sequential, or your own internal numeric identifier.
   - *First Name*
   - *Last Name*
   - *Polling Place Code*
     Polling place codes can be found in the first column of the *POLLING PLACES* table in ePulse.
   - *Role*
     Enter the associated role name exactly as it appears in ePulse. See *Searching for Poll Worker Roles* for more information.
5. Save the file for import.

See *Importing a Poll Worker File* for importing instructions.

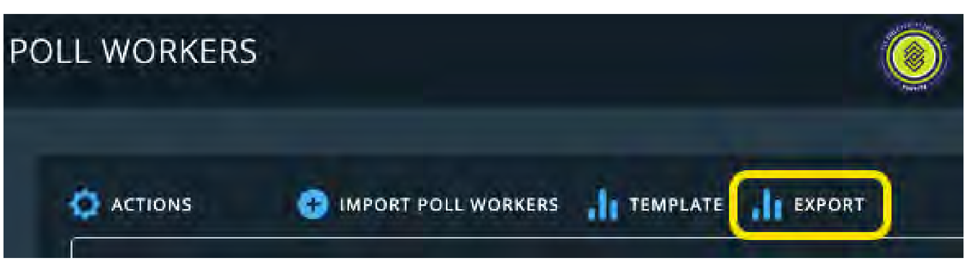
4.2.3.2 Exporting a Poll Worker File

You can export existing poll workers by downloading a CSV file from ePulse.

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

The *POLL WORKERS* page is displayed.

2. Click **EXPORT**.



The *poll_workers.csv* file is downloaded to your computer.

4.3 Searching for Poll Workers

To locate poll workers in ePulse, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

The *POLL WORKERS* page is displayed.

2. Enter the name of the poll worker in the *Search* box.

The *POLL WORKERS* table automatically updates as you enter the search criteria

3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

   - STATUS
   - TYPE
   - PARTY
   - ROLE
   - PLACE

4. To filter by the last time the poll worker has or has not signed in, follow these steps:
   - Click to select **Signed in** or **Did not sign in** from the drop-down filter.
   - Type in a number to represent minutes, hours, days, or weeks.
   - Click to select **minutes**, **hours**, **days**, or **weeks ago**.
   - Click **APPLY FILTERS**.

The *VOTERS* table automatically updates as you select the search criteria. To remove a filter, click the **X** on the filter.

4.3.1 Viewing Poll Worker Profiles

To view a poll worker's profile, locate the poll worker as instructed in *Searching for Poll Workers*, and click the name of the poll worker in the table.

The *POLL WORKER DETAILS* page is displayed.

4.3.2 Editing Poll Worker Profiles

Poll worker profiles can be updated individually, and some changes can be made to multiple poll workers at once.

4.3.2.1 Editing an Individual Poll Worker Profile

To edit a single poll worker, follow these steps:

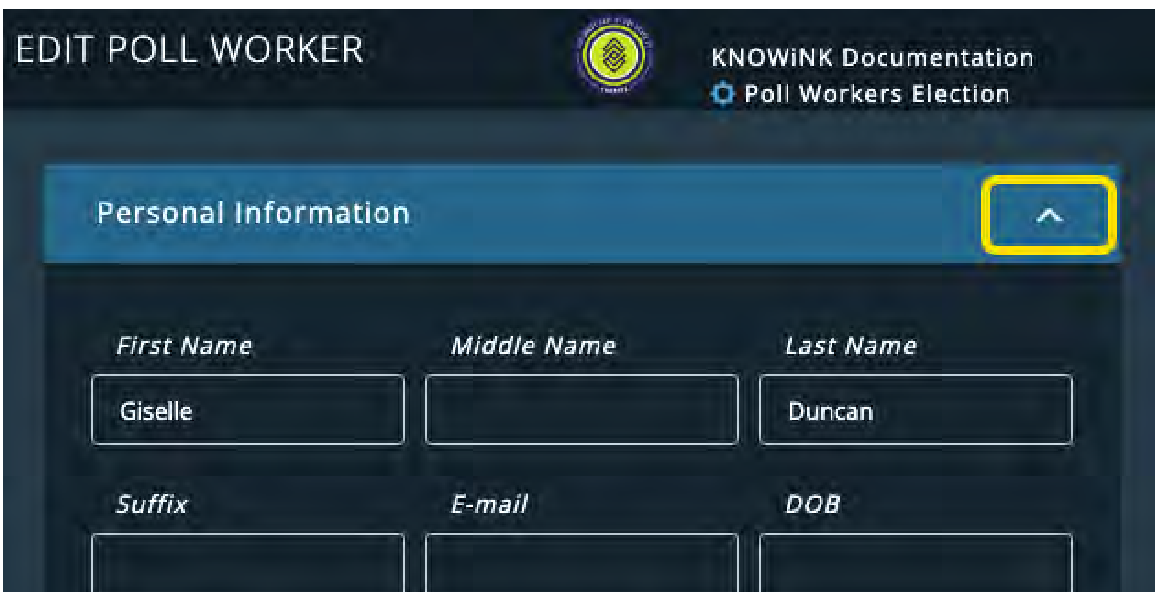
1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to edit.

The *POLL WORKER DETAILS* page is displayed.

3. Click **ACTIONS**, and select **EDIT**.

The *EDIT POLL WORKER* page is displayed.

4. Click the expander arrow (⌄) for any of the following sections and update the fields as needed:
   - *Personal Information*
   - *Address Information*
   - *Mailing Address*
   - *Phone*



5. Click **SUBMIT**.

A confirmation message appears.

4.3.2.2 Editing Poll Workers in Bulk

Editing multiple poll worker profiles is limited to the following information:

- *Polling place*
- *Status*
- *Role*
- *Custom Rate*

To edit multiple poll workers, follow these steps:

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Select the checkbox circles next to the poll workers to edit, or click **Select All**.
3. Click **ACTIONS**, and select **EDIT POLL WORKERS**.

A form with the available selections to edit appears.

4. Update the selections as needed, and click **SAVE**.

4.3.3 Deleting Poll Workers

You can delete poll workers individually or in bulk from the poll workers table.

4.3.3.1 Deleting Individual Poll Workers

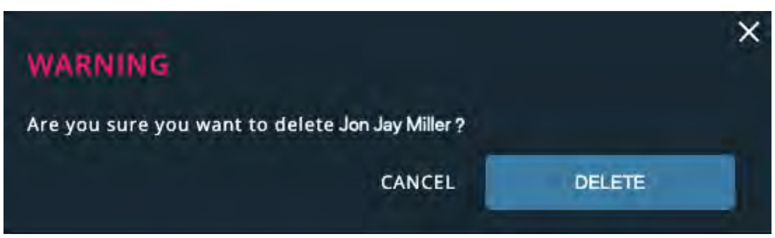
To delete a single poll worker, follow these steps:

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to delete.

The *POLL WORKER DETAILS* page is displayed.

3. Click **ACTIONS**, and select **DELETE**.

A *WARNING* message is displayed.



4. Click **DELETE**.

CAUTION: Clicking **DELETE** will immediately delete the poll worker and cannot be undone.

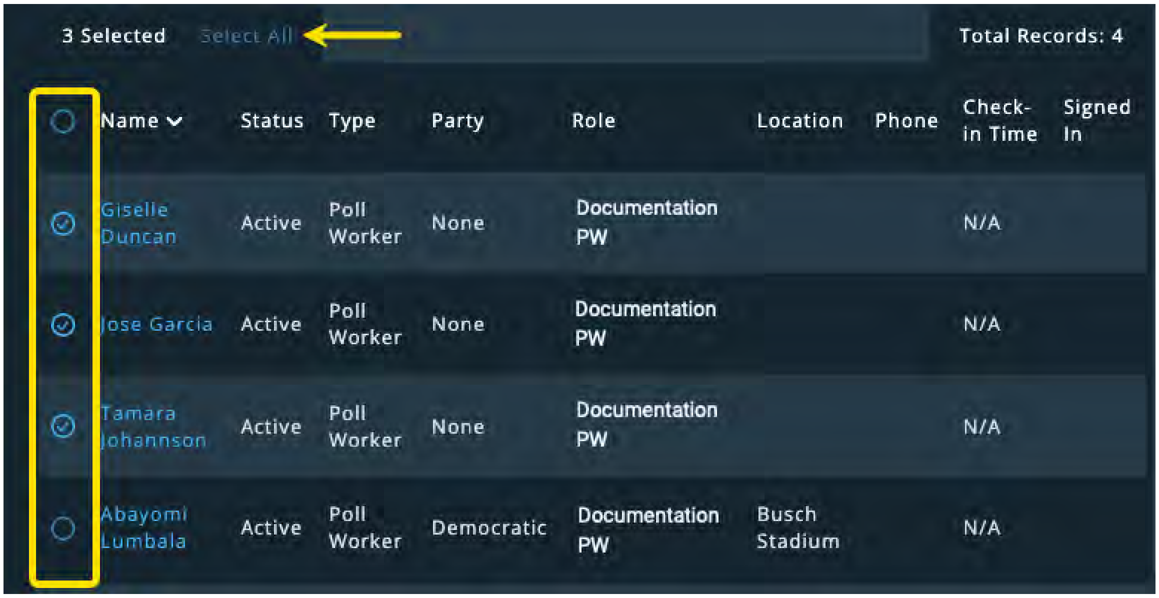
4.3.3.2 Deleting Poll Workers in Bulk

To delete multiple poll workers at once, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **MANAGE**.

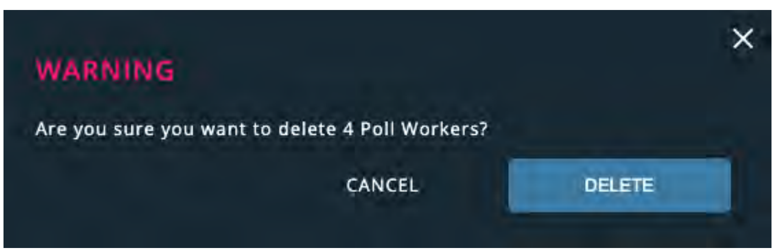
The *POLL WORKERS* page is displayed.

2. Select the checkbox circles next to the poll workers to delete, or click **Select All**.



3. Click **ACTIONS** and select **DELETE**.

A *WARNING* message is displayed.



4. Click **DELETE**.

CAUTION: Clicking **DELETE** will immediately delete the poll workers and cannot be undone.

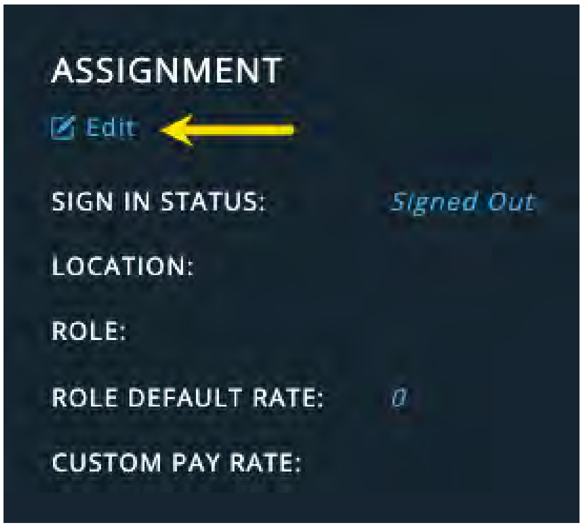
4.4 Managing Poll Worker Assignments

4.4.1 Assigning Poll Workers to Polling Places

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to assign.

The *POLL WORKER DETAILS* page is displayed.

3. Click **Edit** under the *Assignment* heading.



Assignment drop-down lists appear.

4. Click to select from the *Polling place* drop-down list.
5. Click to select from the *Role* drop-down list.

The *Role default rate* populates.

6. Optional: Enter a rate in the *Custom Rate* field.
   A custom rate is used when an alternative pay rate is determined for an individual worker.
7. Click **SAVE**.

The *Assignment* information is added to the poll worker's profile.

4.4.2 Editing a Poll Worker Assignment

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to edit.

The *POLL WORKER DETAILS* page is displayed.

3. Click **Edit** under the *Assignment* heading.
4. Update the selections as needed, and click **SAVE**.

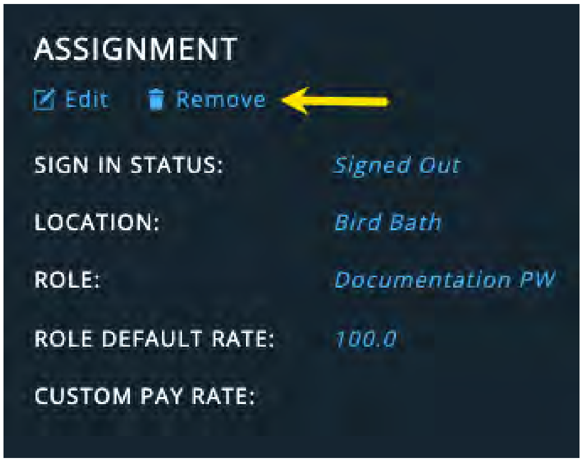
To edit multiple poll worker assignments at once, see *Editing Poll Workers in Bulk*.

4.4.3 Removing Poll Worker Assignments

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to update.

The *POLL WORKER DETAILS* page is displayed.

3. Click **Remove** under the *Assignment* heading.



The *Assignment* information is removed from the poll worker's profile.

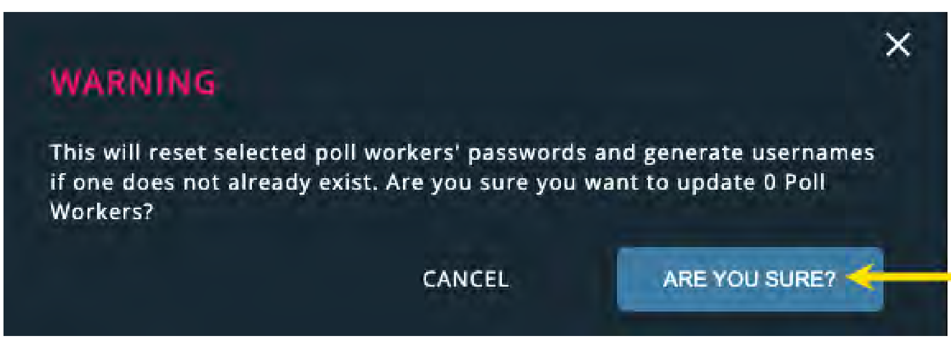
4.5 Generating Logins for Poll Workers

Generating logins will reset the selected poll workers' passwords and generate usernames if one does not already exist. **Contact support before using this feature.**

To generate logins for poll workers, follow these steps:

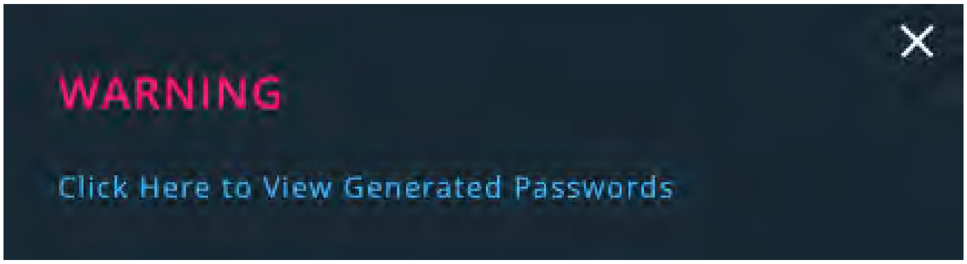
1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Select the checkbox circle(s) next to the applicable poll worker(s), or click **Select All**.
3. Click **ACTIONS** and select **GENERATE LOGINS**.

A warning message appears.



4. Click **ARE YOU SURE?**.

Another warning message is displayed.



5. Click **Here** in the message.

A PDF of the new logins is displayed in a browser print window.

6. Use your browser's print function to save the PDF.
7. Click the **X** to close the *Warning* message in ePulse.

4.6 Resetting a Poll Worker's Password

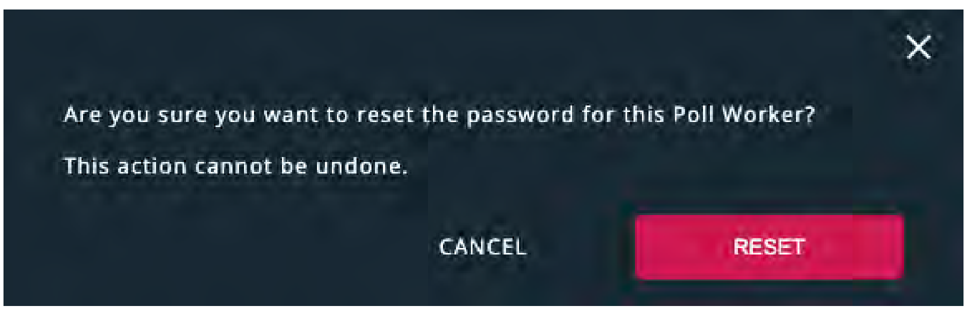
To reset the password for a poll worker, follow these steps:

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker that needs the password reset.

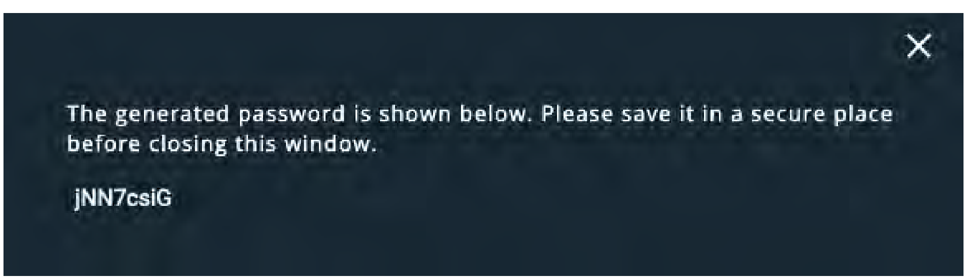
The *POLL WORKER DETAILS* page is displayed.

3. Click **ACTIONS** and select **GENERATE PASSWORD**.

A confirmation request dialog appears.



4. Click **RESET**.
5. A dialog box appears with the new password.



6. Once you have saved the password, click the **X** to close the dialog box.

4.7 Managing Poll Worker Classes

The following tasks can be managed from the Poll Workers / Classes module:

- Adding Classes
- Searching For and Viewing Classes
- Editing and Deleting Classes
- Assigning Poll Workers to Classes

4.7.1 Adding Poll Worker Classes

To add a new poll worker class, follow these steps:

1. Click **POLL WORKERS** in the left navigation menu, and select **CLASSES**.

The *POLL WORKER CLASSES* page is displayed.

2. Click **ADD CLASS**.

The *NEW POLL WORKER CLASS* page is displayed.

3. Click the expander arrow (⌄) for the following sections and complete the fields:
   - *Class Information*
   - *Address Information*
4. Click **SUBMIT**.

The new class is added to the *POLL WORKER CLASSES* table.

4.7.2 Viewing Poll Worker Classes

To locate and view poll worker classes, follow these steps:

5. Click **POLL WORKERS** in the left navigation menu, and select **CLASSES**.

The *POLL WORKER CLASSES* page is displayed.

6. Enter the name of the class in the *Search* box.

The *POLL WORKER CLASSES* table automatically updates as you enter the search criteria

7. Click the name of the class to view.

The *POLL WORKER CLASS DETAILS* page is displayed.

4.7.3 Editing Poll Worker Classes

To update poll worker class information, follow these steps:

1. Locate the class as instructed in *Viewing Poll Worker Classes*
2. Click the name of the class to edit.

THE *POLL WORKER CLASS DETAILS* page is displayed.

3. Click **ACTIONS**, and select **EDIT**.

The *EDIT POLL WORKER CLASS* page appears.

4. Click the expander arrow (⌄) for the following sections and update as needed:
    a. *Class Information*
    b. *Address Information*
5. Click **SUBMIT**.

The class is updated, and the *POLL WORKER CLASSES* page is displayed.

4.7.4 Deleting Poll Worker Classes

To delete a poll worker class, follow these steps:

1. Locate the class as instructed in *Viewing Poll Worker Classes*.
2. Click the name of the class to delete.
3. Click **ACTIONS**, and select **DELETE**.
   CAUTION: Clicking **DELETE** will immediately delete the class and cannot be undone.

The class is removed from the *POLL WORKER CLASSES* table.

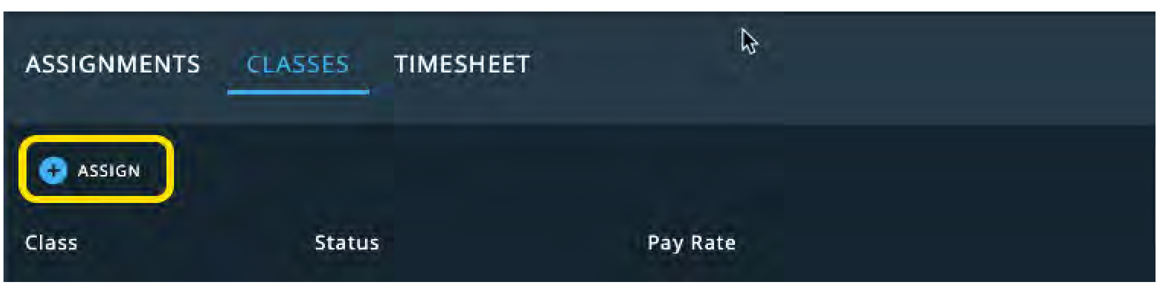
4.7.5 Assigning Poll Workers to Classes

To assign poll workers to a class, follow these steps:

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the poll worker to assign.

The *POLL WORKER DETAILS* page is displayed.

3. Click the **CLASSES** tab at the bottom of the profile, and select **ASSIGN**.



The class assignment form appears.

4. Click to select from the *Class* drop-down menu.
5. Click to select **Assigned** from the *Status* drop-down menu.
6. Optional: Enter a dollar amount in the *Custom Rate* field.
   A custom rate is used when an alternative pay rate is determined for an individual worker.
7. Click **SAVE**.

The class is added to the *CLASSES* tab of the poll worker's profile.

4.7.5.1 Viewing a Poll Worker’s Classes

To view a poll worker’s class assignments, follow these steps:

1. Locate the poll worker as instructed in *Searching for Poll Workers*.
2. Click the name of the applicable poll worker.

The *POLL WORKER DETAILS* page is displayed.

3. Click the *CLASSES* tab at the bottom of the profile.

4.7.5.2 Deleting Poll Worker Class Assignments

To delete poll worker class assignments, locate the class to edit as instructed in *Viewing a Poll Worker’s Classes*, and click the trashcan icon in line with the class to delete.

CAUTION: Clicking the trashcan icon will immediately delete the class from the poll worker’s profile but will not delete the class from the system.

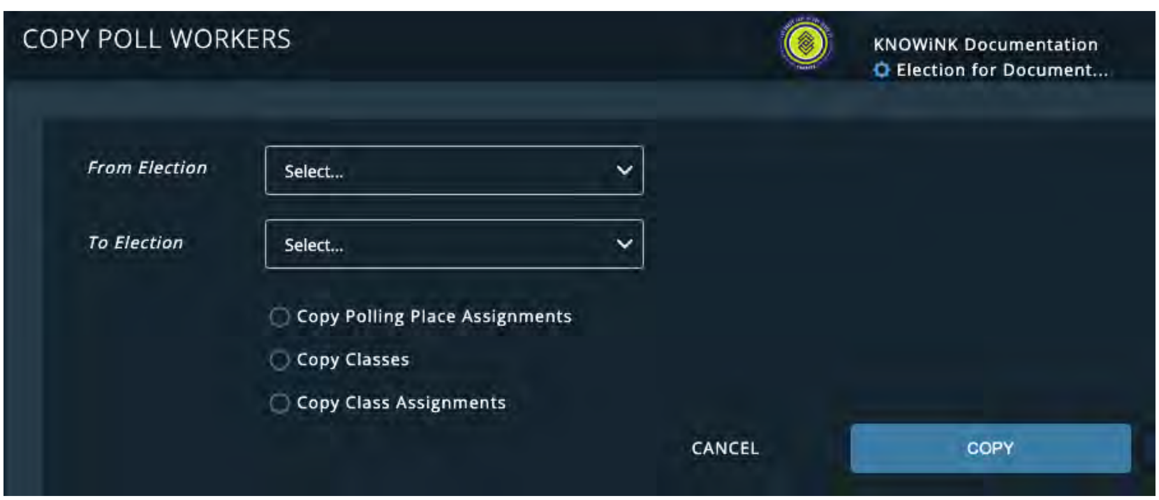
The class is removed from the poll worker's profile.

4.8 Copying Poll Workers from Another Election

You can copy poll workers from another election in the system and assign them to the current election.

1. Click **POLL WORKERS** in the left navigation menu, and select **COPY**.

The *COPY POLL WORKERS* page is displayed.



2. In the *From Election* drop-down list, click to select the election to copy them from.
3. In the *To Election* drop-down list, click to select the election to copy them to.
4. Click to select the checkbox circles for any of the *Copy* options:
5. Click **COPY**.

The poll workers are added to the *POLL WORKERS* table for the selected election.

Table of Contents

5.0 Managing Poll Pads

To assign only a select number of Poll Pads to a new election, select NONE during the Transfer Poll Pads step of creating an election. The system defaults to transferring all Poll Pads if no selection is made. See the *Additional Options* section for more information.

There are three ways to assign Poll Pads in ePulse.

- Assign Individual Poll Pads
- Assign Multiple Poll Pads
- Create and Import Poll Pad Assignments

Polling place assignments and configurations don't reset between elections if polling places have not changed. ePulse retains assignments based on polling place IDs.

5.1 Searching for a Poll Pad

To locate Poll Pads in ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **MANAGE**.

The *POLL PADS* page is displayed

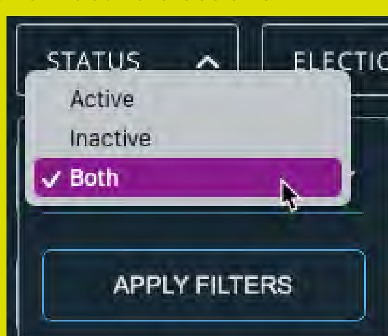
2. Enter applicable Poll Pad information in the *Search* box.

The Poll Pad table automatically updates based on your search criteria.

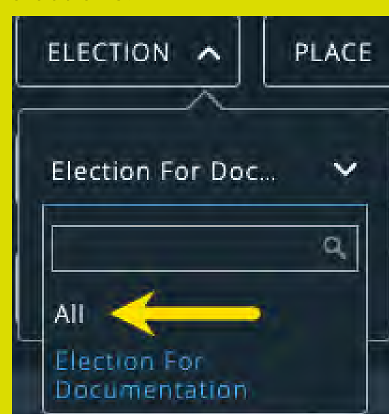
3. Click to select from the filtering drop-down menus and click **APPLY FILTERS** on each to refine search results.

NOTE

The *STATUS* filtering drop-down menu includes an option to select **Both**, which will include both *Active* and *Inactive* elections.



The ELECTION filtering drop-down menu includes an option to select **All**, which includes all of the elections.



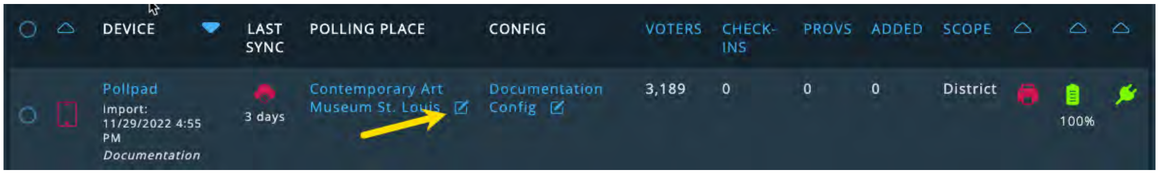
The Poll Pad table automatically updates based on your search criteria.

4. Scroll to locate the applicable Poll Pad in the *POLL PADS* table.

5.2 Assigning Individual Poll Pads

To assign individual Poll Pads to an election after it has been created, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. To change the polling place assignment of the Poll Pad, click the **Pencil** icon next to the *POLLING PLACE* name, select from the drop-down list, and click **SAVE**.



3. To change the config assignment, click the **Pencil** icon next to the *CONFIG* name, select from the drop-down list, and click **SAVE**.

The selections are saved.

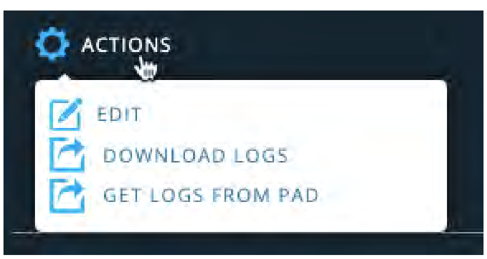
5.2.1 Editing individual Poll Pads

To edit details for an individual Poll Pad, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. Click on the *Device Name* for the Poll Pad to edit.

The Poll Pad detail page appears.

3. Click **ACTIONS** and select **EDIT** from the drop-down menu.



The *Edit Poll Pad Details* window appears.

4. Click to select from the drop-down menus as needed, and click **SAVE**.

The Poll Pad detail page is displayed, and the changes are reflected.

5.2.2 Uploading Logs from Poll Pads

To get logs from a Poll Pad, follow these steps:

1. Ensure the Poll Pad is powered on and the application is open.
2. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
3. Click on the *Device Name* for the Poll Pad to edit.

The Poll Pad detail page appears.

4. Click **ACTIONS** and select **GET LOGS FROM PAD** in the drop-down menu.

The *Logs Requested* message appears.

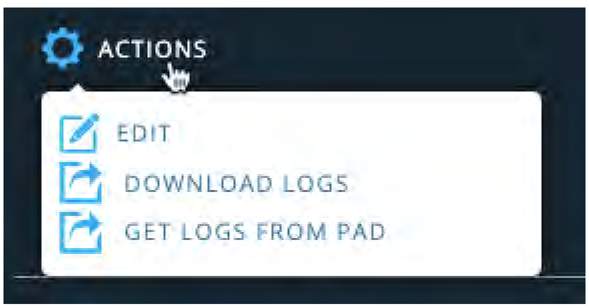
5.2.3 Downloading Poll Pad Logs

To download Poll Pad logs, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. Click on the *Device Name* for the Poll Pad.

The Poll Pad detail page appears.

3. Click **ACTIONS** and select **DOWNLOAD LOGS** from the drop-down menu.



The logs are downloaded to your computer.

5.3 Assigning Multiple Poll Pads

To edit the assignments of multiple Poll Pads after an election has been created, follow these steps:

1. Locate Poll Pads as instructed in *Searching for a Poll Pad*.
2. Scroll to locate the applicable Poll Pads.
3. Select the circle checkbox next to the Poll Pads to include in the assignment.
4. Click **ACTIONS** and select **EDIT**.

5. Click to select from the following drop-down menus:
    - *Status*
    - *Election*
    - *Polling Place*
    - *Configuration Profile*
    - *Poll Pad Scope*
        - *Local*
          Only displays the list of registered voters for that particular polling place
        - *District*
          Displays the entire list of registered voters for a jurisdiction, such as a county or a city
        - National
          Displays the entire list of registered voters for a state or country
6. Click **SAVE**.

The new assignment(s) are saved.

5.4 Creating a Poll Pad Assignment File

You will need to create or download a Poll Pad assignment file in order to upload Poll Pad assignments to ePulse. The import file must be a complete list of all Poll Pad device names with the polling locations and configuration profiles to be assigned to each Poll Pad.

To create the Poll Pad Assignments File, follow these steps:

1. Choose from the following:
    A. Open a new Excel file
    B. To download an existing file using the EXPORT ASSIGNMENT option, follow these steps:
        i. Click **POLL PADS** in the left navigation menu, and select **MANAGE**.

    The POLL PADS page is displayed.

        ii. Click **ACTIONS** and select **EXPORT ASSIGNMENT**.

The *pollpad_assignments.csv* file is downloaded to your computer.

        iii. Navigate to the applicable file on your computer and double-click it to open.
2. Enter or confirm the following headers:
    - Column A: Poll Pad Name
      Name of the Poll Pad to update assignment for, e.g., Pollpad Demo County 004
    - Column B: Polling Place Code
      The unique polling place code to assign to the Poll Pad
    - Column C: Config Profile Name
      The name of the configuration profile to assign to the Poll Pad
3. Enter the corresponding information in the appropriate columns, and save the file as a CSV.

5.5 Importing a Poll Pad Assignment File

Once you have created a Poll Pad assignment file, you can import it into ePulse. The import file must be a complete list of all Poll Pad device names with the polling locations and configuration profiles to be assigned to each Poll Pad.

To import the Poll Pad Assignments File, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **MANAGE**.

The POLL PADS page is displayed.

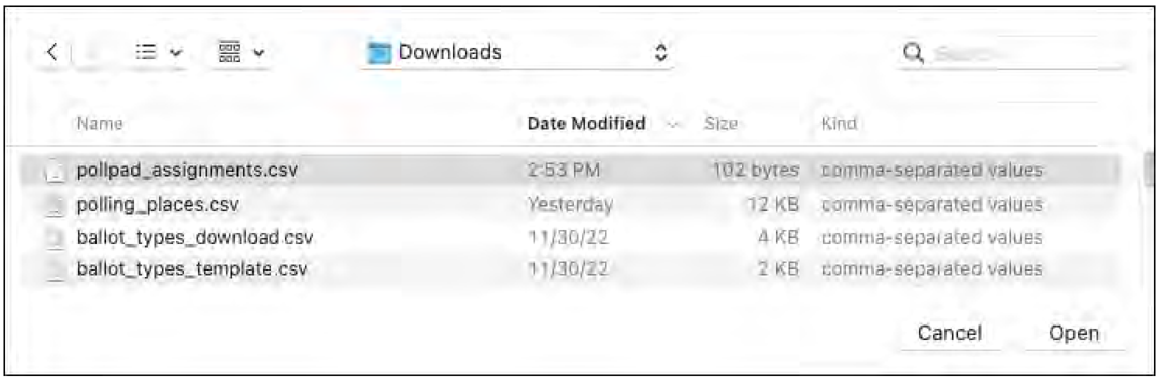
2. Click **ACTIONS** and select **IMPORT ASSIGNMENT**.

The *Upload Poll Pad Assignments File* page is displayed.

3. Click **Choose a File**.

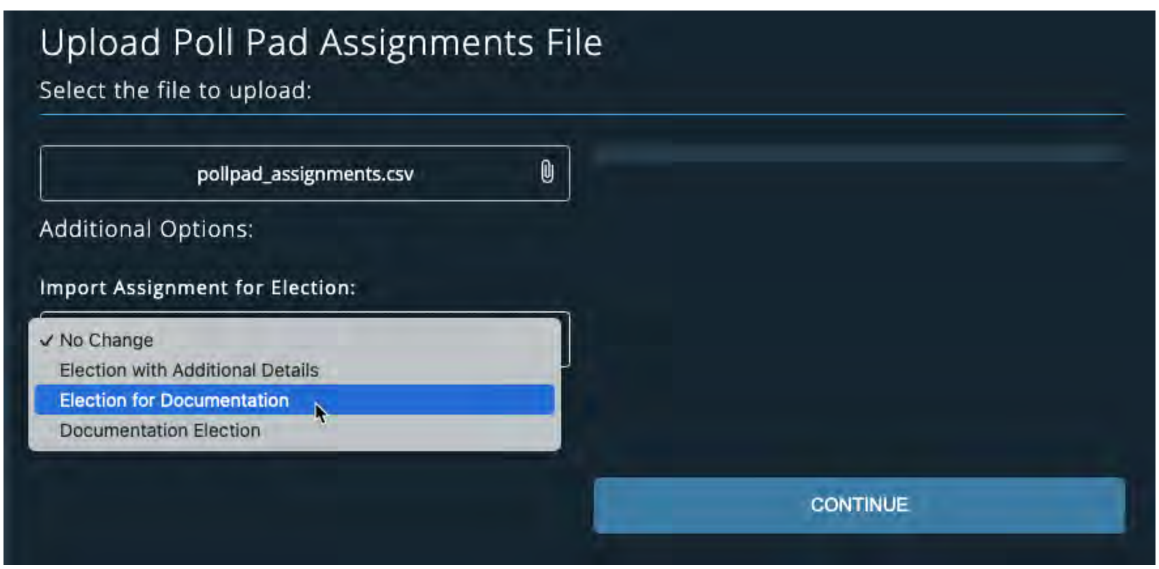
The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.



The *Choose a File* field is now populated with the uploaded file.

5. Click to select from the *Import Assignment for Election* drop-down list.



6. Click **Continue**.

7. When the import is complete, click **DONE**.

The assignments are applied to the selected election.

5.6 Requesting a Poll Pad Sync

To request a Poll Pad sync, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. Click to select the checkbox circle in line with the applicable Poll Pad in the *POLL PADS* table.
3. Click **ACTIONS** and select **REQUEST SYNC**.

A confirmation message appears.

5.7 Managing Poll Pad Tags

Adding tags to Poll Pads helps organize assignments and keep track of inventory.

5.7.1 Creating Poll Pad Tags

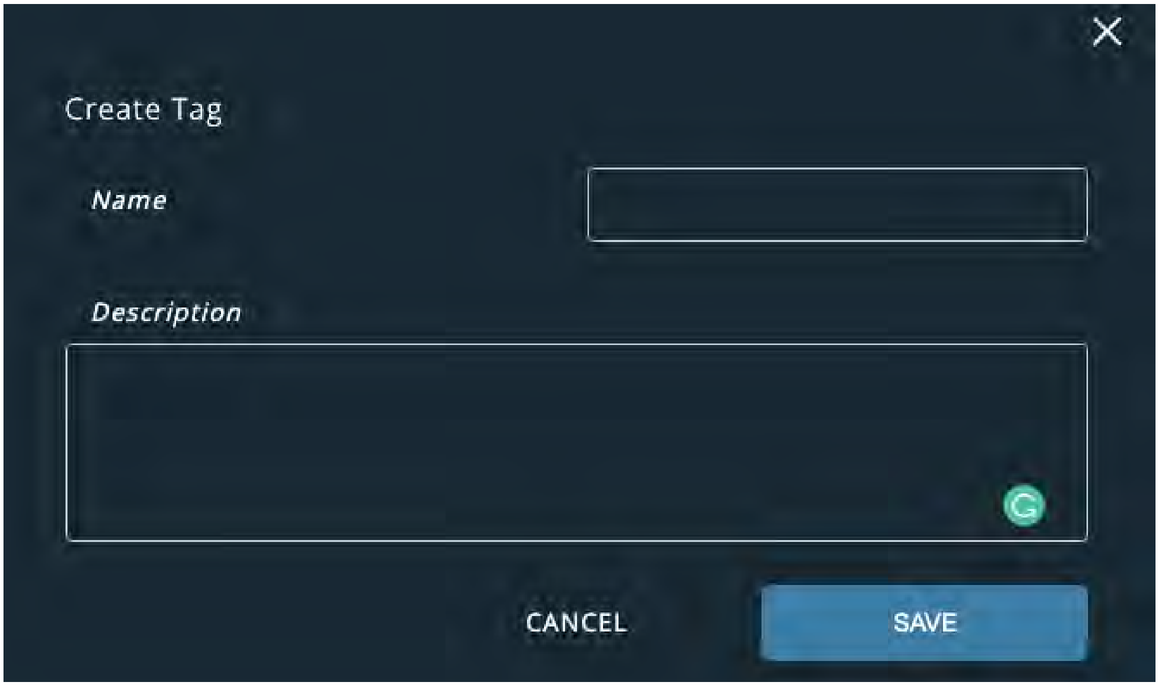
To create tags for Poll Pads, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **TAGS**.

The POLL PAD TAGS page is displayed.

2. Click **ADD TAG**.

The *Create Tag* form is displayed.



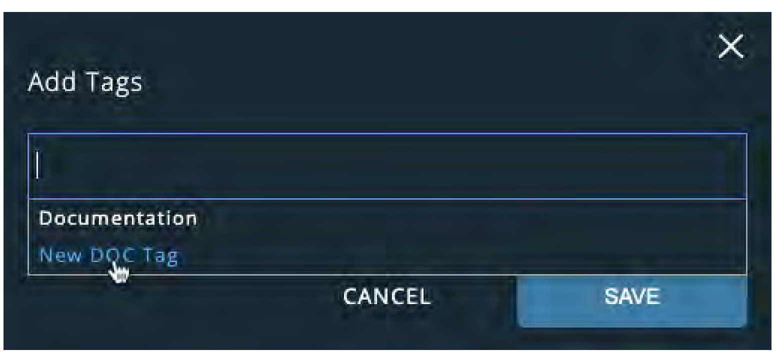
3. Enter the *Name* of the new tag.
4. Describe the tag in the *Description* field.
5. Click **SAVE**.

The new tag appears in the *POLL PAD TAGS* table.

5.7.2 Assigning Poll Pad Tags

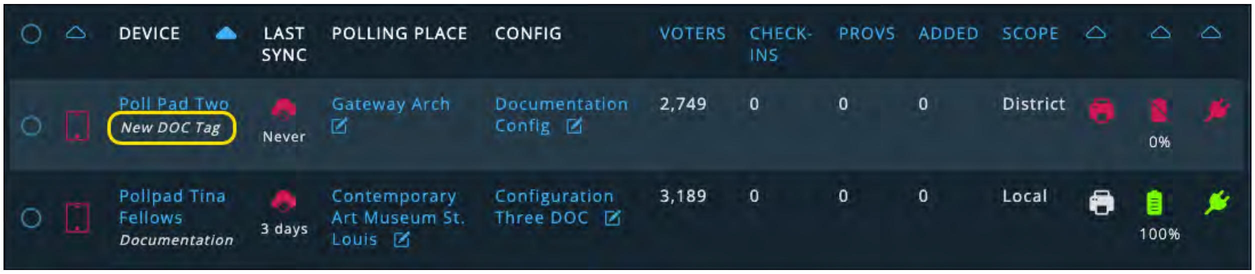
To assign tags to Poll Pads, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. Select the checkbox circle next to the Poll Pads to tag.
3. Click **ACTIONS** and select **ADD TAGS**.
4. Click to select from the *Add Tags* drop-down list.



5. Click **SAVE**.

The tag is added to the Poll Pad line item in the *POLL PADS* table.



5.7.3 Removing Tags from a Poll Pad

To remove tags from Poll Pads, follow these steps:

1. Locate Poll Pad as instructed in *Searching for a Poll Pad*.
2. Select the checkbox circle next to the appropriate Poll Pads.
3. Click **ACTIONS** and select **REMOVE TAGS**.
4. Click to select from the *Remove Tags* drop-down list.
5. Click **SAVE**.

The selected tag is removed from the Poll Pad.

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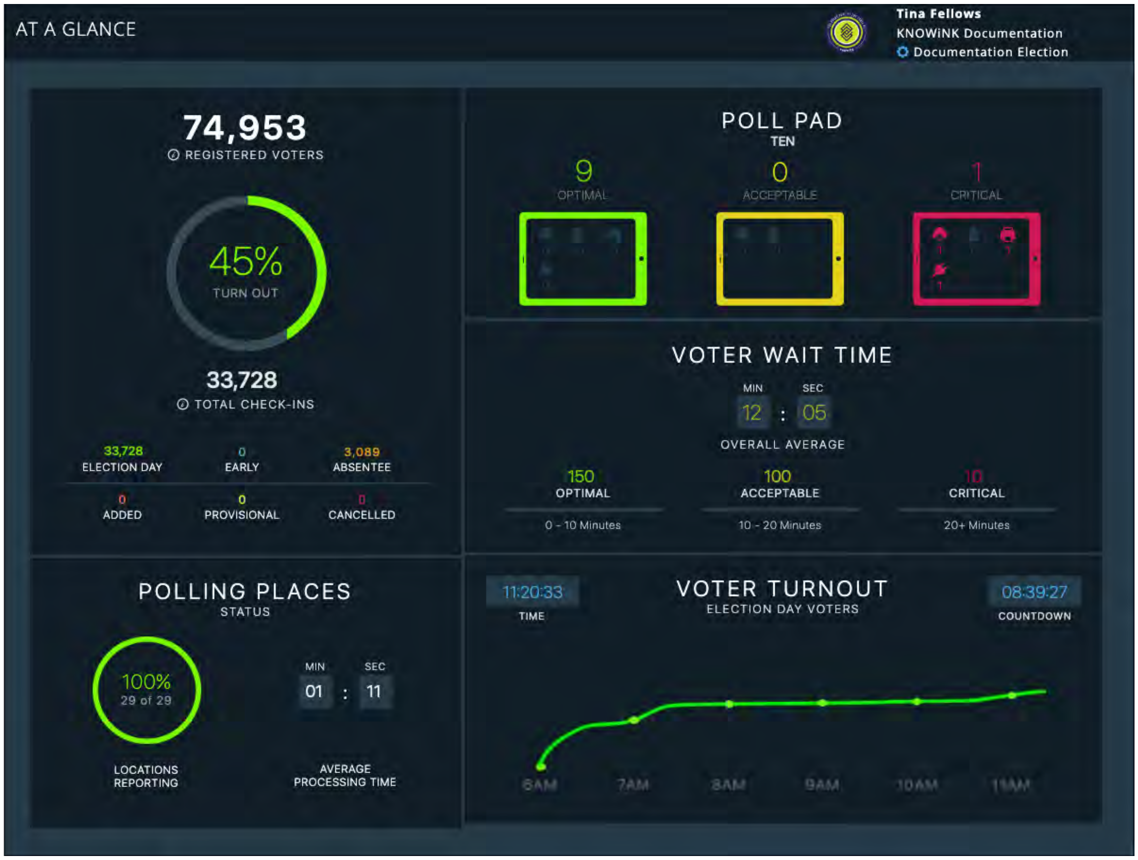
6.0 Election Day and Early Voting

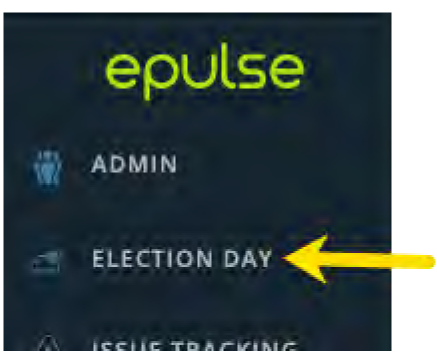
6.1 Understanding the Dashboard

The *AT A GLANCE* dashboard displays an overview of election data.



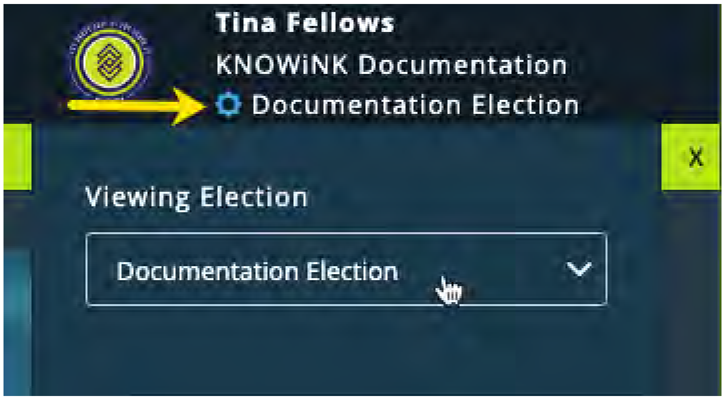
To view the dashboard, follow these steps:

1. Click **ELECTION DAY** from the left navigation menu.



The *AT A GLANCE* dashboard is displayed.

2. To toggle between elections, click the settings icon in the header and click to select from the *Viewing Election* drop-down menu.



The dashboard is displayed.
The dashboard includes the following information:

Registered Voters
The total number of registered voters imported from the voter registration file.

Turn Out
The percentage of registered voters that have checked in

Total Check-Ins
The total and the breakdown of voter check-ins by category

Poll Pad
The number and status of Poll Pads. Three status categories track synchronization, battery level, printer status, and charging status.

The three status categories are as follows:

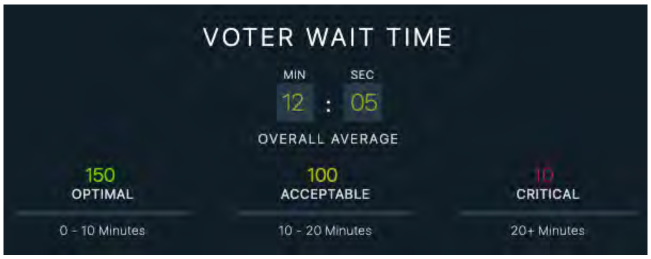
- OPTIMAL (Green)
- ACCEPTABLE (Yellow)
- CRITICAL (Red)

You can click on an icon in the affected Poll Pad to display detailed Poll Pad statistics.*

*See the *Poll Pads* section of this guide for more information.

Voter Wait Time

Displays real-time Voter Wait Time statistics from the Poll Pads at polling locations when used on Poll Pad.

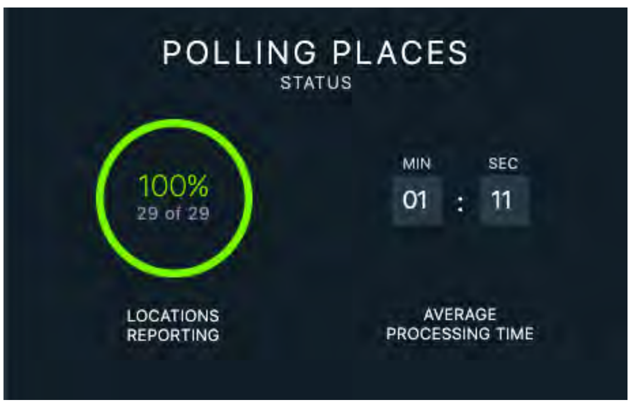


Overall Average

Average voter wait time to check in is reflected in minutes and seconds. Wait times are categorized as follows:

- OPTIMAL (Green) = 0–10 minutes
- ACCEPTABLE (Yellow) = 10–20 minutes
- CRITICAL (Red) > 20 minutes

Polling Places - Status



Locations Reporting

A polling place has reported when a Poll Pad from that location syncs with ePulse.

Average Processing Time

The average amount of time it takes poll workers to complete the check-in process on the Poll Pads.

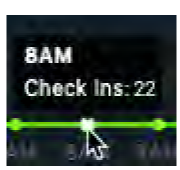
Voter Turnout

Time

Current local time.

Countdown

Hours, minutes, and seconds until polls close



Election Day Voters

Graph of voter turnout by the hour. Hover your cursor over an hour dot to show the number of voters at that time.

6.2 Monitoring Poll Pads

See the *Understanding the Dashboard* section for more election-day monitoring tools.

If you are using connected Poll Pads at polling places, you can monitor Poll Pad activity in ePulse.

To monitor Poll Pad activity in ePulse, follow these steps:

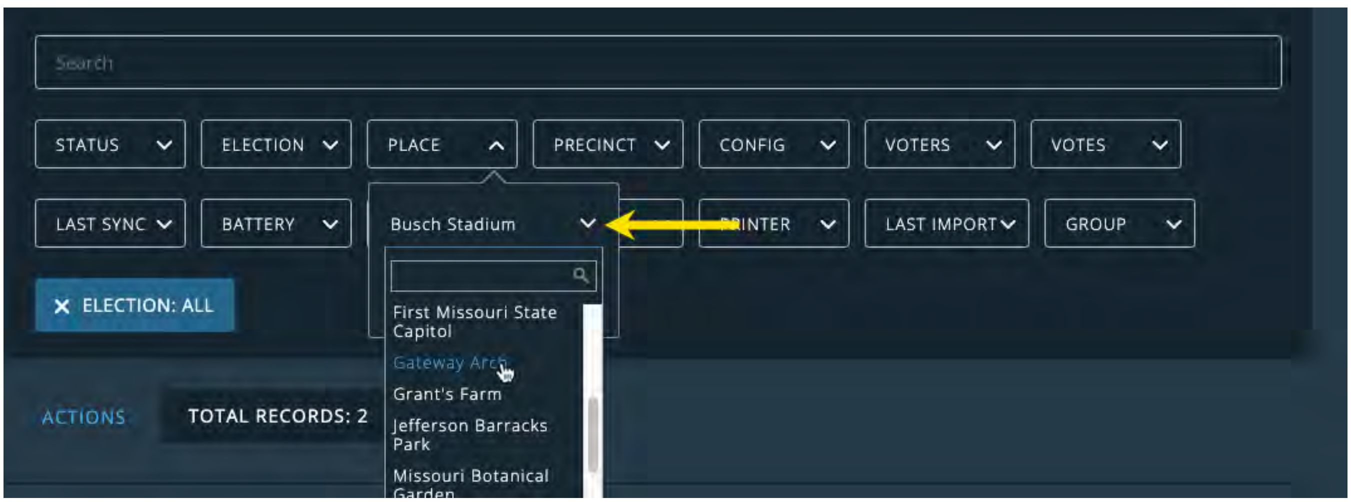
1. Click **POLL PADS** in the left navigation menu, and select **MANAGE**.

The *POLL PADS* page is displayed

2. Enter applicable Poll Pad information in the *Search* box.

The Poll Pad table automatically updates based on your search criteria.

3. Click to select from the filter drop-down menus and click **APPLY FILTERS** on each to refine search results.



The Poll Pad table automatically updates based on your search criteria, and the following status categories are shown for the selected Poll Pads:

DEVICE POWER
A battery icon that shows the power level on the Poll Pad.

SYNCHRONIZATION
A cloud icon indicates if the Poll Pad is syncing to ePulse via Wi-Fi.

PRINTER
A printer icon shows if the printer is connected via Bluetooth.

CHARGING
An electrical plug icon indicates if the Poll Pad is charging or not.

COLOR KEY

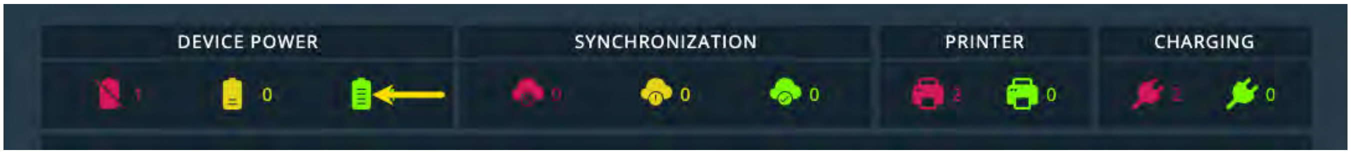
Green = Optimal

Yellow = Acceptable

Red = Critical

Blue = Viewing
This is the icon you have clicked on and are currently viewing.

4. Click on an icon to display that status for the Poll Pads.



The selected Poll Pad information is shown in the table below.

See the *Poll Pads* section of this guide for more information on the options in the *ACTIONS* menu.

6.3 Viewing Ballot Inventory

The Ballot Inventory screen tracks ballots issued, by location and style, during an election. The number of ballots sent to a precinct must be entered on the ballot styles page before using the ballot inventory module.

To view ballot inventory, follow these steps:

1. Click **BALLOTS** in the left navigation menu.

The *BALLOT INVENTORY* screen is displayed.

2. To display the corresponding ballot styles, choose from any or all of these options:
   - Click a square icon under *BALLOTS LEFT*.
   - Enter the ballot style code or the polling place name
   - Click to select from the filter drop-down menus and select **APPLY FILTERS** on each.

   The *BALLOT STYLE* table automatically updates based on your search criteria.

3. Click on a table header to sort by that header.
   You cannot sort by *PRECINCT*, *TYPE*, or *LANGUAGE*.

6.4 Sending Messages to Poll Places

You can send a message from ePulse to a specific poll place or broadcast the message to all poll places.

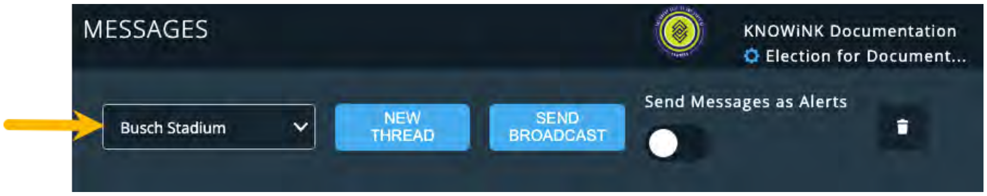
6.4.1 Sending a Message to a Specific Poll Pace

To send a message to a specific poll place, follow these steps:

1. Click **MESSAGES** in the left navigation menu.

The *MESSAGES* screen is displayed.

2. Click to select the poll place from the drop-down list.

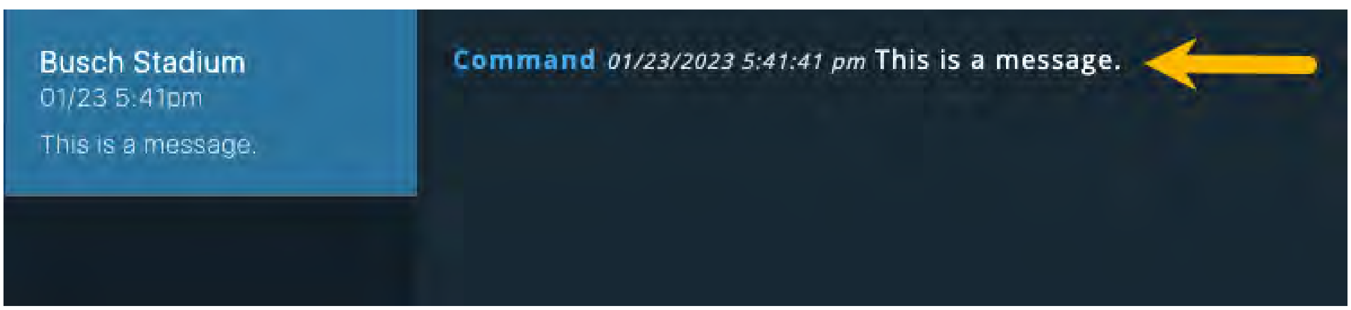


3. Click **NEW THREAD**.
4. Choose from the following options:
    - Click to toggle on *Send Messages as Alerts* to allow a pop-up to display on the poll pads when the message is delivered.

    Sending a message as an Alert pauses activity on the Poll Pad screen until the pop-up is dismissed and is recommended when there is urgent information to be communicated.

    - Leave the toggle off; no pop-up will display, but the envelope icon will display on the poll pads to indicate an available message.
5. Click to type the message in the *Type Message* field. And click **SEND**.

The message appears with the date and time sent.



6.4.2 Broadcasting a Message to all Poll Places

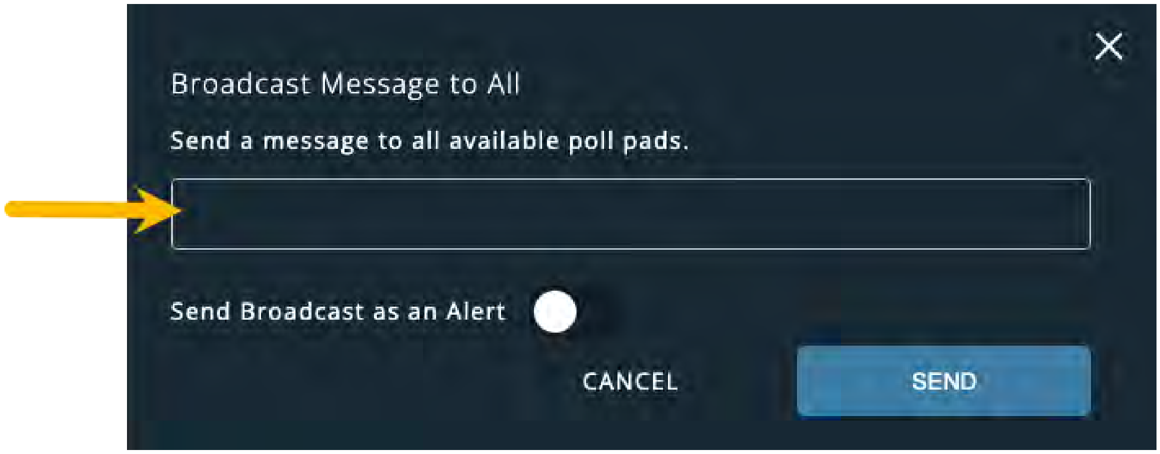
To send a message to all locations, follow these steps:

1. Click **MESSAGES** in the left navigation menu.

The *MESSAGES* screen is displayed.

2. Click to select the poll place you would like the broadcast to originate from.
3. Click **SEND BROADCAST**.

The *Broadcast Message to All* dialog appears.

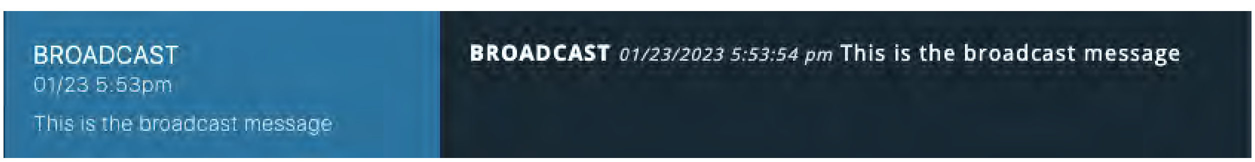


4. Type the message to broadcast.
5. Choose from the following options:
    - Click to toggle on *Send Broadcast as an Alert* to allow a pop-up to display on the poll pads when the message is delivered.

    Sending a broadcast message as an Alert pauses activity on the Poll Pad screens until the pop-up is dismissed and is recommended when urgent information needs to be communicated.

    - Leave the toggle off, and no pop-up will display, but the envelope icon will display on the poll pads to indicate the message is available.
6. Click **SEND**.

The message appears as a *BROADCAST* with the date and time sent.

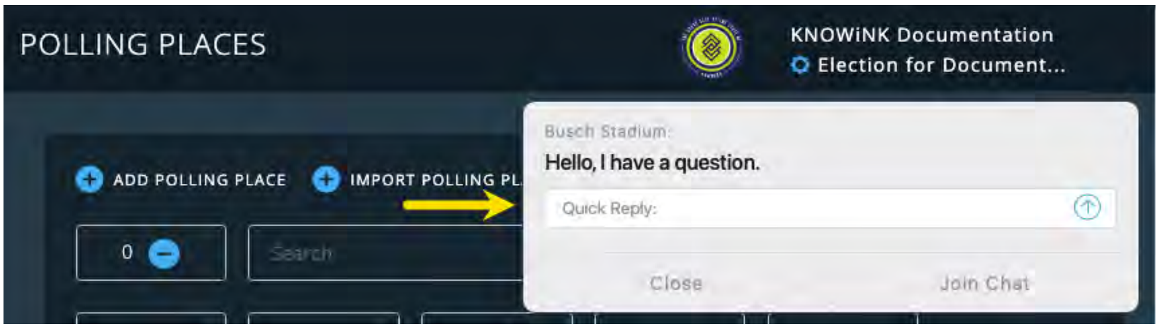


6.4.3 Sending and Receiving Chat Messages

When a new message has been sent to ePulse from a poll place, a pop-up is displayed to notify the ePulse user.

6.4.3.1 Sending a Quick Reply from the Pop-up

To respond to the message from the pop-up, type a response in the *Quick Reply* field and click the arrow to send the message.



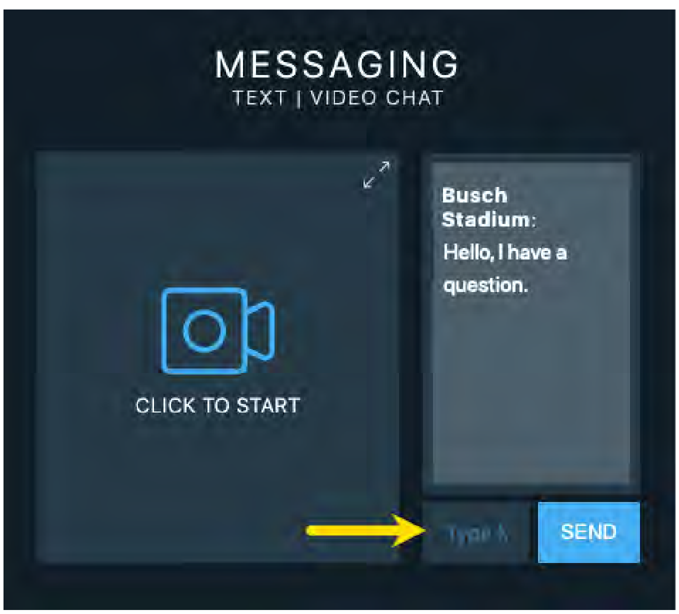
6.4.3.2 Replying to a Message in Conversation View

To view the conversation before responding to the message, follow these steps:

1. Click **Join Chat** in the pop-up message.

The Polling Place page is displayed.

2. Enter a response in the *Type Message* field and click **SEND**.



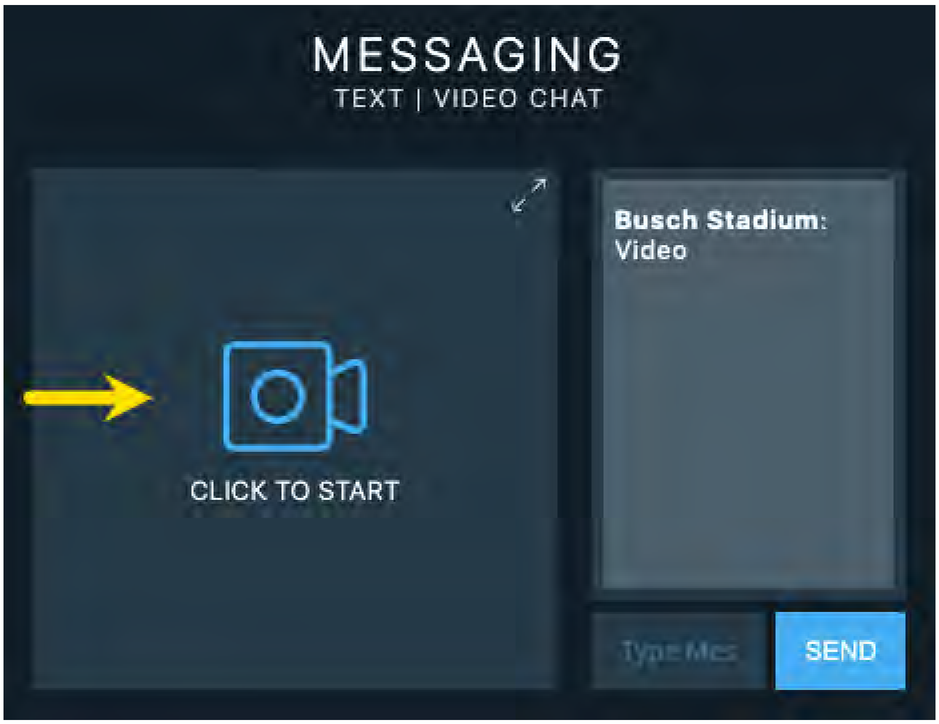
3. Your message appears in the *MESSAGING* window and is sent to the Polling Place.

6.4.3.3 Starting a Video Chat

1. To start a video chat, locate the polling place profile as instructed in *Searching for Polling Places*.

The Polling Place page is displayed.

2. Click the camera icon.



The *WAITING FOR POLL PAD* message appears. The video will start when the polling place has accepted your chat request.

3. To end the chat session, click anywhere in the video chat window.

6.4.3.3.1 Viewing the Video Chat in Full Screen

To view a video chat in full-screen, follow these steps:

1. Click the full-screen double arrows to expand the video chat window.

The video chat window opens in a new browser tab.

2. The following three icons are available in full-screen mode:
    a. Camera (Selfie View)
       Opens a window to view yourself in the chat
    b. Microphone
       Mutes the chat
    c. Telephone Receiver
       Ends the chat

3. To close the full-screen chat window, close the browser tab.

The video chat window is restored.

4. To end the chat session, click anywhere in the video chat window.

6.4.3.4 Replying to a Video Chat Request

When a new video chat has been sent to ePulse from a polling place, a pop-up is displayed where you can click **ACCEPT** or **DECLINE.**

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7.0 Post-Election Tasks

The following tasks must be completed after each election:

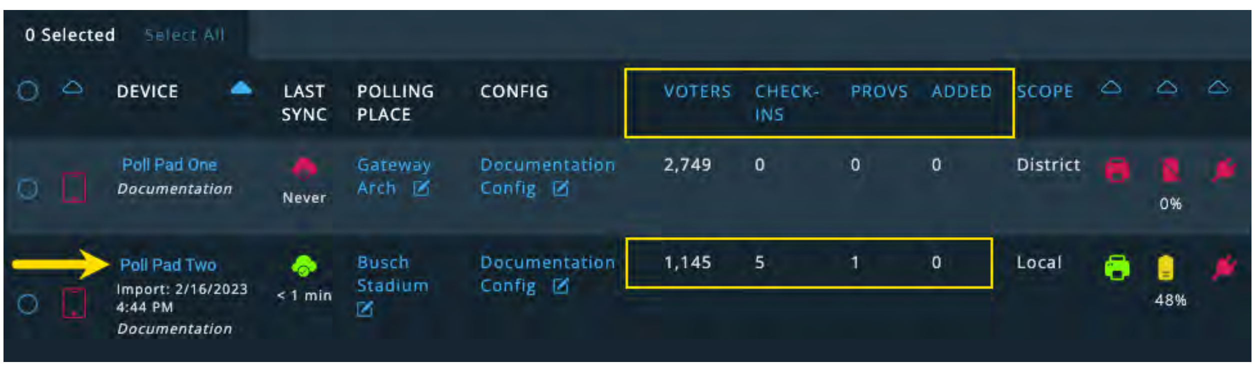
1. Synchronize all Poll Pads with ePulse
2. Verify Poll Pad check-in count and run a Poll Pad Report for adjudication
3. Generate voter history
4. Run additional reports
5. Export SDR data
6. Close the election

7.1 Verifying Poll Pad Counts in ePulse

To sync Poll Pads with ePulse and export voter history, see *Exporting Voter History from Poll Pads to ePulse* in the *Poll Pad Administrative User Guide*.

To verify that the counts in ePulse correspond with the activity reflected on each Poll Pad, follow these steps:

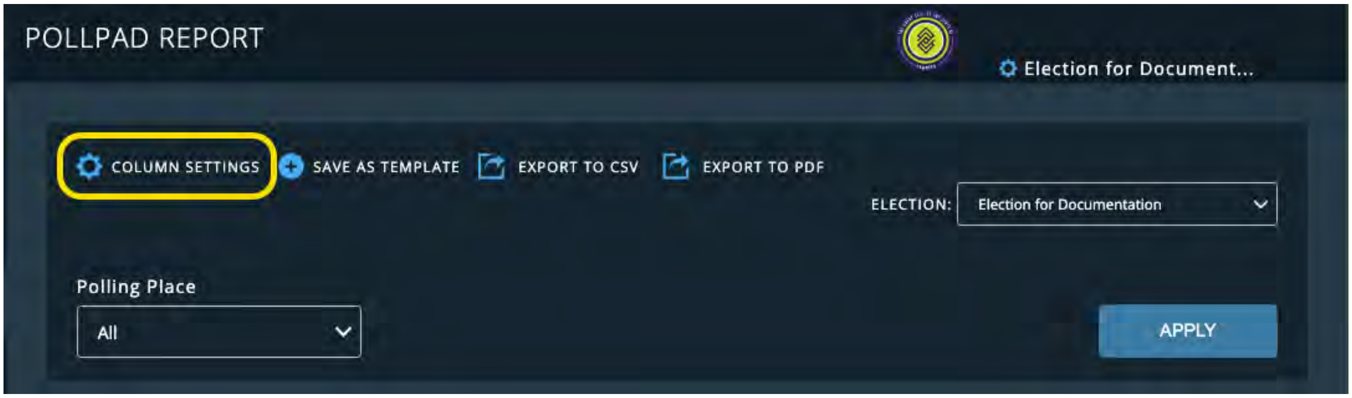
1. Locate Poll Pads as instructed in *Searching for a Poll Pad*.
2. Scroll to locate the applicable Poll Pads in the table.
3. View the Poll Pad numbers in the *Device* list and verify they match your Poll Pad export numbers.



4. Click **REPORTING** in the left navigation menu, and select **VELOCITY REPORT**.

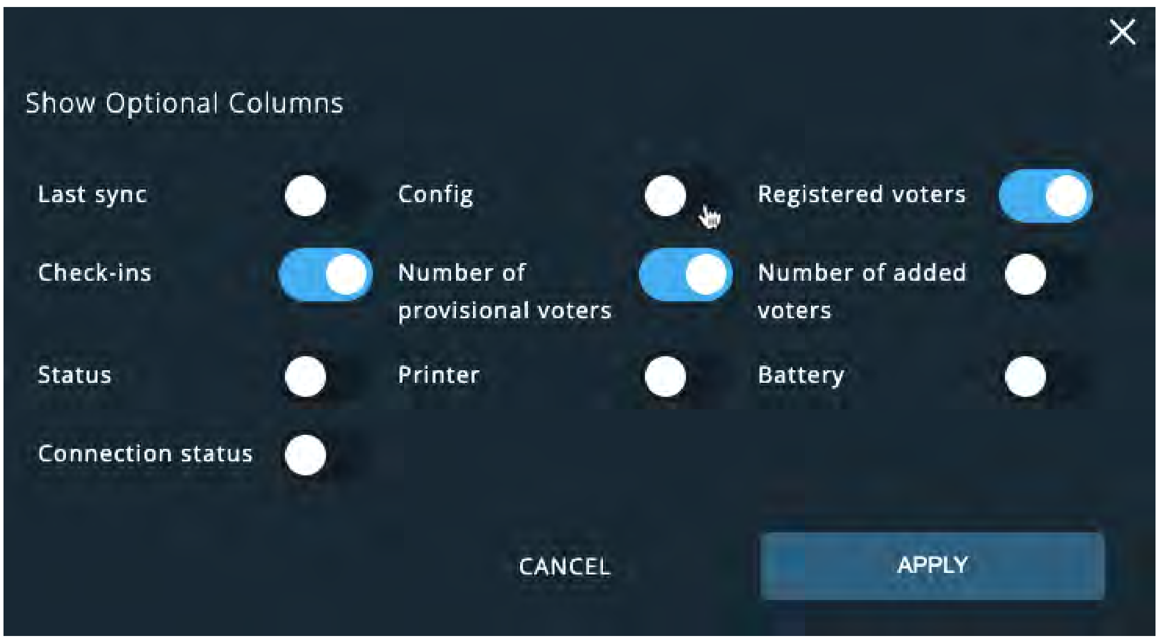
The *VELOCITY REPORTS* page is displayed

5. Scroll to locate and click on **PollPad Report**.
6. Click **COLUMN SETTINGS**.



The *Show Optional Columns* window appears.

7. Use the toggles to include or exclude specific columns in the report.



8. Click **APPLY**.

You are returned to the *POLLPAD REPORT* page.

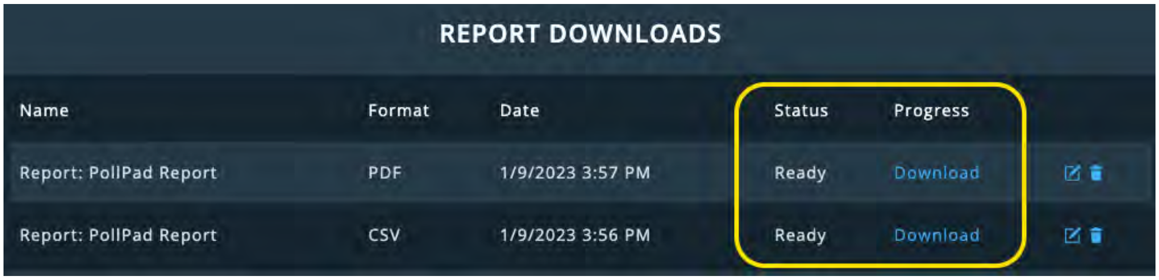
9. Click to select from the *Polling Place* drop-down list, and click **APPLY**.
10. To export the report for adjudication, click to select either **EXPORT TO PDF** or **EXPORT TO CSV**.

The *Generating Report* window appears.

11. Click the **here** in *View generated reports here*.

The *REPORT DOWNLOADS* page is displayed.

12. If the report *Status* column reads *Ready*, click **Download** in line with the report to export.



The report downloads to your computer.

7.2 Downloading Files for Your Voter Registration System

To download the files your Voter Registration System (VRS) will use to post voter history to the voter records, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* table is displayed.

2. Click the applicable election.

The *ELECTION DETAILS* page is displayed.

3. Follow these steps to download the following files under the *Tools* menu:

A. <u>*Generate Voter History*</u>

i. Click **Generate Voter History**.

The *Voter History Export Options* form appears.

ii. Click to select from the drop-down menu, and click **EXPORT**.
Menu options vary based on voter registration system options and requirements.

The *Voter History* file appears in the *RECENT ELECTION FILES* table.

iii. Click **Download** in line with the file when the *Status* column shows *Ready*.

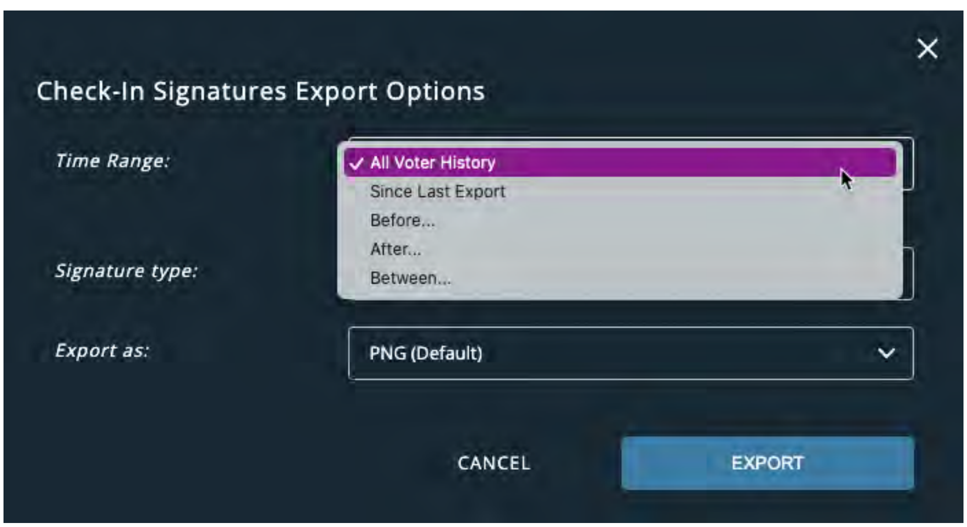
The file is downloaded to your computer.

B. <u>*Export Check-In Signatures*</u>

i. Click **Export Check-In Signatures**.

The *Check-In Signatures Export Options* form appears.

ii. Click to select from the *Time Range* drop-down menu.



iii. Click to select **Both (Default)**, **Regular Only**, or **Provisional Only** from the *Signature type* drop-down menu.

iv. Click to select one of the following file types to export from the *Export as* drop-down menu:

- *PNG (Default)*
- *JPEG (Additional processing necessary)*
- *TIFF (Additional processing necessary)*

v. Click **EXPORT**.

The *Check-In Signatures* file appears in the *RECENT ELECTION FILES* table.

vi. Click **Download** in line with the file when the Status column shows *Ready*.

The file is downloaded to your computer.

C. <u>*Export Check-In Pollworker Initials*</u>

i. Click **Export Check-In Pollworker Initials**.

The *Check-In pollworker Initials Export Options* form appears.

ii. Click to select one of the following file types to export from the *Export as* drop-down menu:

- *PNG (Default)*
- *JPEG (Additional processing necessary)*
- *TIFF (Additional processing necessary)*

iii. Click **EXPORT**.

The *Check-In Poll Worker Initials* file appears in the *RECENT ELECTION FILES* table.

iv. Click **Download** in line with the file when the Status column shows *Ready*.

The file is downloaded to your computer.

7.3 Generating Velocity Reports

You can generate additional reports in ePulse.

Available Velocity Reports		
Active Check-In Cancellations	MO ABS Ballot Voters	Voter Turnout by Precinct
Assistance Voters	Multiple Active Check-ins	Provisional Voter Report
Ballot Reconciliation Report	Nevada PollBook Counts Report	Poll Pads that exceeded the search limit
Ballot Styles	Out-of-State License Report	Spoiled Ballots
Canceled Check-ins	Party Turnout Report	Suspended/Inactive Voters who Voted
Challenge Voters	Poll Book Entries	Count of Transactions
Check-In Vouchers/Attesters	Poll Pad Signature Export Confirmation	Voter Check-Ins with NY Districts
Voter Check-in Details with Signatures	PollPad Report	Voter Turnout
Check-ins outside Polling Place hours	Poll Worker Sign-Ins	Voter Turnout by Polling Place (Hourly)
ID Types and Methods	Voter Rolls by Polling Place	Average Wait Time
Issue Tracking Details	Voter Turnout by Polling Place	

To generate any of the available velocity reports, follow these steps:

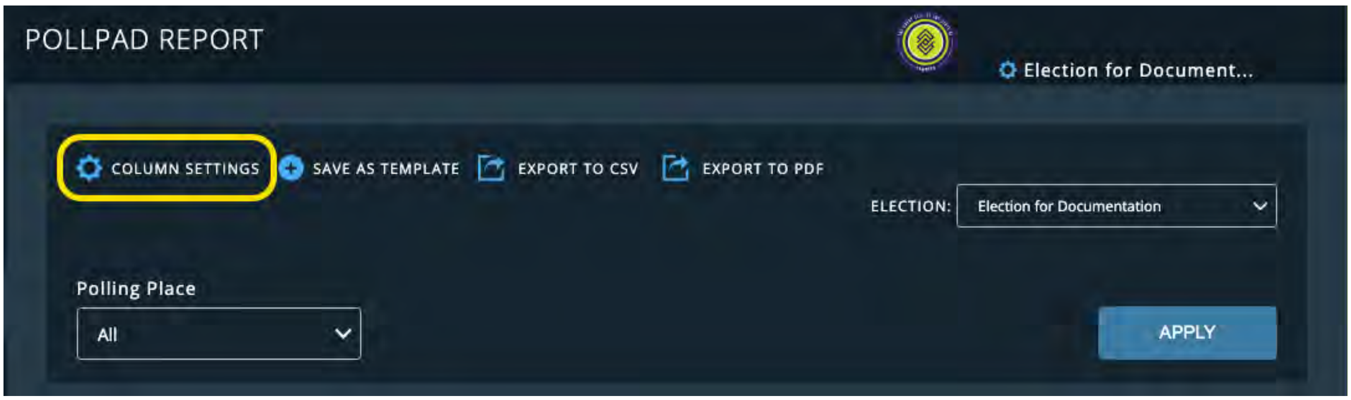
1. Click **REPORTING** in the left navigation menu, and select **VELOCITY REPORT**.

The *VELOCITY REPORTS* page is displayed.

2. Scroll to locate and click on the appropriate report.

The report page is displayed.

3. Click to select from the *ELECTION* drop-down list. The default is the current election.
4. To define which data columns appear in the report, click **COLUMN SETTINGS**.



The *Show Optional Columns* window appears.

5. Use the toggles to include or exclude specific columns in the report.
6. Click **APPLY**.

You are returned to the report page.

7. To filter the data included in the report, click to select from the filter drop-down menus.
8. Click **APPLY**.
9. To sort the data before exporting, click the column headers to sort by that column. Sortable columns vary by report.
10. To export the report for adjudication, click to select either **EXPORT TO PDF** or **EXPORT TO CSV**.
11. When the *Generating Report* window appears, click **here** in *View generated reports here*.

The *REPORT DOWNLOADS* page is displayed.

12. To download the report to your computer, click **Download** in line with the report to export when the *Status* column reads *Ready*.

NOTE
Status options are *Processing*, *Ready*, or *Error: Failed*
An *Error: Failed* status is often due to a system time-out. Generating the report again usually works, but if the problem persists, contact *Client Services* for assistance.

The following options are also available on the REPORT DOWNLOADS page:

A. To edit the name of the report, follow these steps:

   i. Click the pencil icon in line with the report.

The *RENAME FILE* form appears.

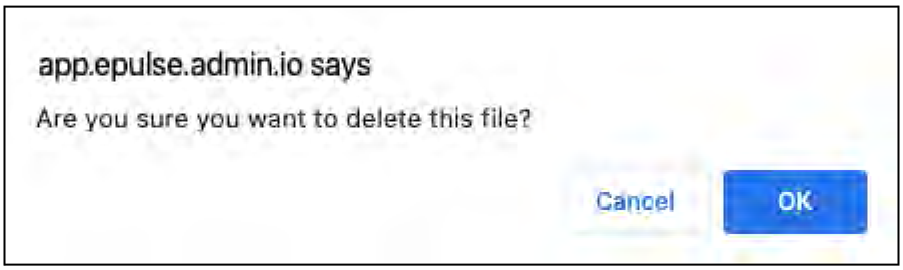
   ii. Edit as needed, and click **SAVE**.

The name has been updated in the *REPORT DOWNLOADS* table.

B. To delete a report, follow these steps:

   i. Click the trash can icon in line with the report to delete.

   ii. A dialog requesting confirmation appears.



   iii. Click **OK**.

The report is removed from the table.

7.3.1 Generating the Voter Check-In Details with Signatures Report

You can generate most reporting data through the *Voter Check-In Details with Signatures* report.

To generate the *Voter Check-In Details with Signatures* report, follow these steps:

1. Click **REPORTING** in the left navigation menu, and select **VELOCITY REPORT**.

The *VELOCITY REPORTS* page is displayed.

2. Scroll to locate and click on **Voter Check-in Details with Signatures**.

The *VOTER CHECK-IN DETAILS WITH SIGNATURES* page is displayed.

3. Click to select from the *ELECTION* drop-down list. The default is the current election.
4. To refine the data included in the report, click to select from the following drop-down menus:

- Voter ID
- Check-in Party
- Voter Party
- Polling Place
- Precincts
- Ballot Styles
- From
- To

5. Click **APPLY**.

A preview of the report appears in the table.

6. To export the report, click to select either **EXPORT TO PDF** or **EXPORT TO CSV**.

The *Generating Report* window appears.

7. Select from the following options:
    A. Click **DOWNLOAD** when report generation is complete.
    B. Click *View generated reports* ***here*** to display the *REPORT DOWNLOADS* page, and when the report *Status* column reads *Ready*, click **Download** in line with the report to export.

The report downloads to your computer.

7.4 Exporting Additional Files

There are additional files available for export on the Election Details page. Available files vary by jurisdiction.
To export the additional optional files listed under the *Tools* heading on the ELECTION DETAILS page, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* table is displayed.

2. Click the applicable election.

The *ELECTION DETAILS* page is displayed.

3. Click on any of the following options:
    - **Export Added Voters**
    - **Export Address Changes**
    - **Export Name Changes**
    - **Export DC SDR Data**
    - **Export SDR Signatures**
    The SDR Data can be exported once the Same Day Registration (SDR) counts have been verified.

The *Export Options* dialog appears. If you are exporting SDR Signatures, click to select from the *Time Range* and *Export as* drop-down menus.

4. Click **EXPORT**.

The file appears in the *RECENT ELECTION FILES* table.

5. Click **Download** in line with the file when the *Status* column shows *Ready*.

The file is downloaded to your computer.

6. Upload the file(s) into your Election Management System.

7.5 Closing the Election

Once an election is finished and all necessary reports have been generated in ePulse, navigate to the Election Details screen to close the election.

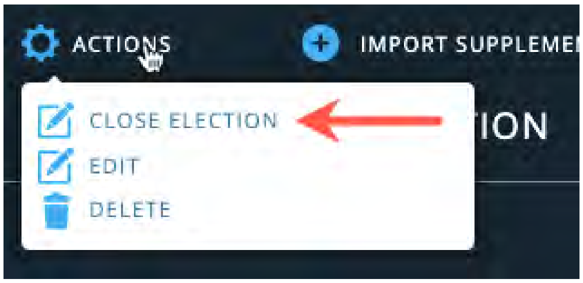
1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* table is displayed.

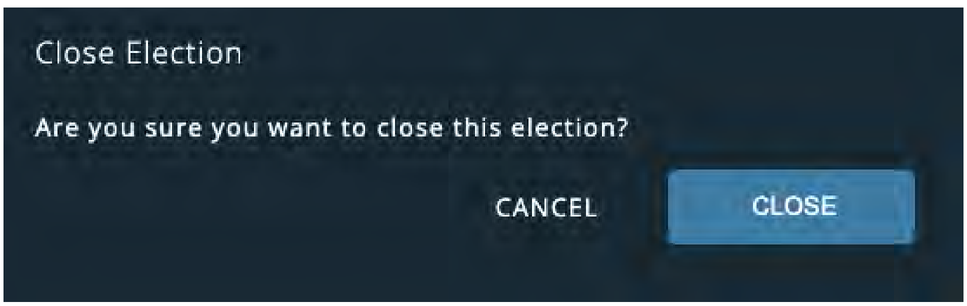
2. Click the applicable election.

The *ELECTION DETAILS* page is displayed.

3. Click **ACTIONS**, and select **CLOSE ELECTION.**



A dialog requesting confirmation appears.



4. Click **CLOSE.**

The *STATUS* is changed to *Closed* on the *ELECTION DETAILS page*.

7.5.1 Reopening an Election

To open a closed election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

The *ELECTIONS* table is displayed and, by default, shows only active elections.

2. Click to select **CLOSED** from the *STATUS* drop-down menu, and click **APPLY FILTERS**.

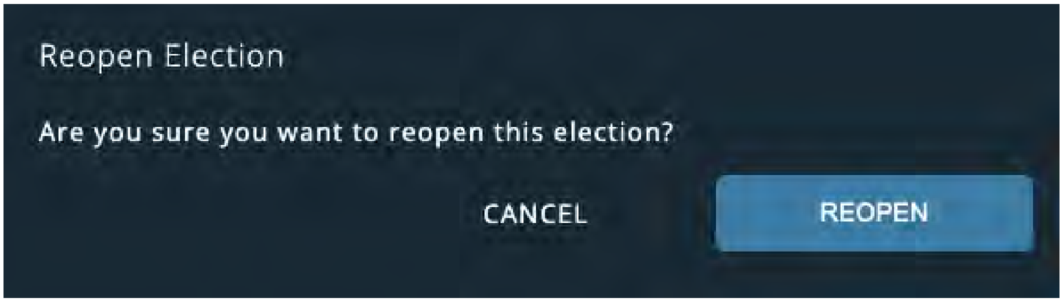
The table is updated to match your selection.

3. Click the election to reopen.

The *ELECTION DETAILS* page is displayed.

4. Click **ACTIONS**, and select **REOPEN ELECTION.**

A dialog requesting confirmation appears.



5. Click **REOPEN**.

The *STATUS* is changed to *Active* on the *ELECTION DETAILS page*.

7.5.2 Deleting an Election

To delete an election, follow these steps:

1. Click **ELECTION SETUP** in the left navigation menu, and select **ELECTIONS**.

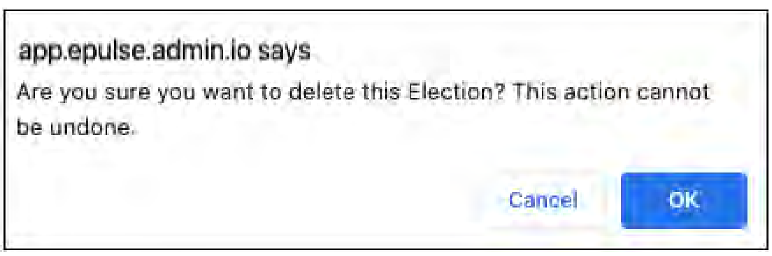
The *ELECTIONS* table is displayed.

2. Click the applicable election.

The *ELECTION DETAILS* page is displayed.

3. Click **ACTIONS**, and select **DELETE.**

A dialog requesting confirmation appears.



4. CLICK **OK**.

Table of Contents

8.0 ePulse Administration

The ePulse Administration section of the guide includes instructions on managing voters, configuring poll pads, and accessing audit logs.

8.1 Voters

The *VOTERS* component in ePulse allows access to the following sub-menus:

- *Registered Voters*
- *Processed Voters*
- *Added Voters*
- *Address Changes*
- *Name Changes*
- *Update Parties*
- *Update Statuses*
- *Update Status Imports*

8.1.1 Registered Voters

The *Registered Voter* component of ePulse allows you to manage the following tasks:

- Download a Voter File
- View a voter record, including Check-in History, Name Changes, Address Changes, and Logs.
- Edit a voter record

8.1.1.1 Viewing a Registered Voter's Record

To locate registered voters in ePulse, follow these steps:

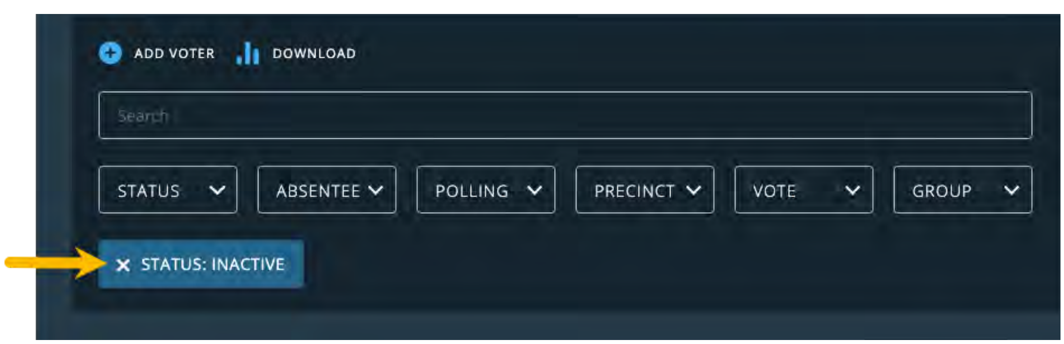
1. Click **VOTERS** from the left navigation menu and select **REGISTERED VOTERS**.

The *VOTERS* page is displayed.

2. Type the voter's full name or Voter ID in the *Search* box.
3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

- STATUS
- ABSENTEE
- POLLING PLACE
- PRECINCT
- VOTE STATUS
- GROUP

The *VOTERS* table automatically updates as you select the search criteria. To remove a filter, click the **X** on the filter.



4. To view a voter record, click the name of the voter in the table.

The voter's record is displayed, and the following five tabs are available for viewing:

- DETAILS
  View the voter's registration information, including Status and Polling Place.
- CHECK-IN HISTORY
  View the voter's check-in history, cancel the check-in, and view custom fields and the correlating signatures. See *Navigating the Check-In History Tab* for more information.
- NAME CHANGES
  View the date and time the change took place, which device was used, the user who made the change, and the original and new name.
- ADDRESS CHANGES
- View the date and time the change took place, which device was used, the user who made the change, and the original and new addresses.
- LOGS
  View the Poll Pad activity pertaining to the voter.

8.1.1.2 Adding a Voter Registration

To add voters from the *Voters* page, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **REGISTERED VOTERS**.

The *VOTERS* page is displayed.

2. Click **ADD VOTER**.

The *EDIT VOTER* form is displayed.

3. Fill in the form as follows:
    a. *Voter Personal Information*
    b. *Address Information*
    c. *Polling Place Information*
4. Click **SUBMIT**.

The voter's record is displayed.

8.1.1.3 Downloading a Registered Voter File

To download a CSV file of registered voters, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **REGISTERED VOTERS**.

The *REGISTERED VOTERS* page is displayed.

2. To filter what is downloaded from the *Registered Voters* list, follow these steps:
    a. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

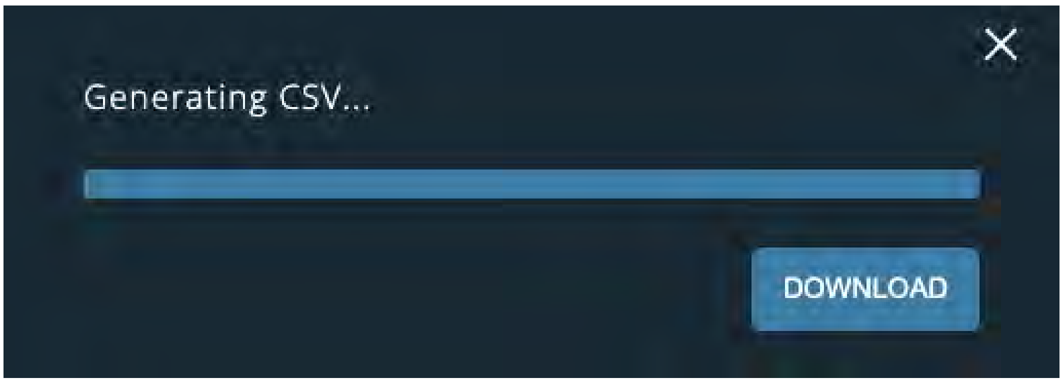
- STATUS
- ABSENTEE
- POLLING PLACE
- PRECINCT
- VOTE STATUS
- GROUP

The *REGISTERED VOTERS* table automatically updates as you select the search criteria.

b. To remove a filter, click the **X** on the filter.

3. Click **DOWNLOAD** to export the list as a CSV file.

The *Generating CSV* dialog appears.



4. Click **DOWNLOAD**.

The file is downloaded to your computer.

8.1.2 Processed Voters

The *Processed Voter* component of ePulse allows you to manage the following tasks:

- Download a Processed Voters File
- View a voter record, including Check-in History, Name Changes, Address Changes, and Logs.
- Edit a voter record

8.1.2.1 Viewing a Processed Voter's Record

To view a processed voter's record, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **PROCESSED VOTERS**.

The *PROCESSED VOTERS* page is displayed.

2. Type the voter's name in the *Search* box.
3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

- STATUS
- POLLING PLACE
- POLL PAD
- PRECINCT
- CANCELED CHECK-INS
- PROVISIONAL

The *PROCESSED VOTERS* table automatically updates as you select the search criteria.

4. To remove a filter, click the **X** on the filter.
5. Click the name of the voter in the table.

The voter's record is displayed, and the following five tabs are available for viewing:

- DETAILS
  View the voter's registration information, including Status and Polling Place.
- CHECK-IN HISTORY
  View the voter's check-in history, cancel the check-in, and view custom fields and the correlating signatures. See *Navigating the Check-In History Tab* for more information.
- NAME CHANGES
  View the date and time the change took place, which device was used, the user who made the change, and the original and new name.
- ADDRESS CHANGES
- View the date and time the change took place, which device was used, the user who made the change, and the original and new addresses.
- LOGS
  View the Poll Pad activity pertaining to the voter.

8.1.2.2 Downloading a Processed Voters File

To download a CSV file of processed voters, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **PROCESSED VOTERS**.

The *PROCESSED VOTERS* page is displayed.

2. To filter what is downloaded from the *Registered Voters* list, follow these steps:
   a. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

- STATUS
- POLLING PLACE
- POLL PAD
- PRECINCT
- CANCELED CHECK-INS
- PROVISIONAL

The *PROCESSED VOTERS* table automatically updates as you select the search criteria.

3. To remove a filter, click the **X** on the filter.
4. To view a voter record, click the name of the voter in the table.

The voter's record is displayed.

5. Click **DOWNLOAD** to export the list as a CSV file.

The *Generating CSV* dialog appears.

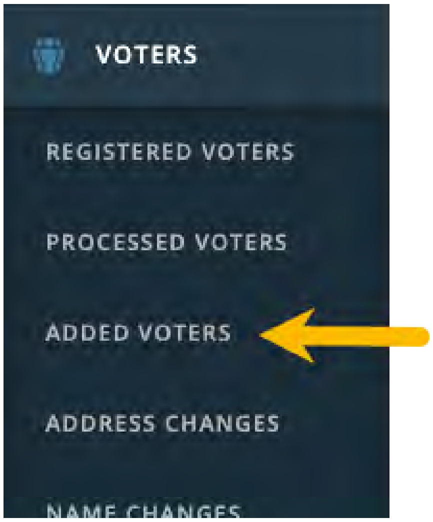
6. Click **DOWNLOAD**.

The file is downloaded to your computer.

8.1.3 Viewing an Added Voter's Record

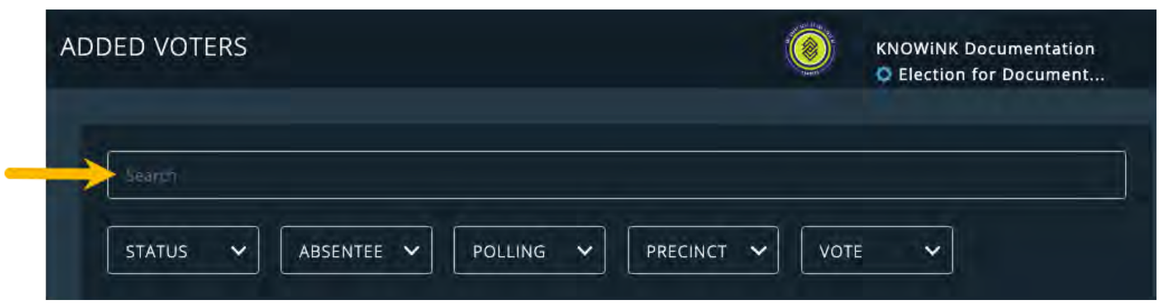
To view added voters in ePulse, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **ADDED VOTERS**.



The *ADDED VOTERS* page is displayed.

2. Type the voter's name in the *Search* box.



3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

   - STATUS
   - ABSENTEE
   - POLLING PLACE
   - PRECINCT
   - VOTE STATUS

The *ADDED VOTERS* table automatically updates as you select the search criteria. To remove a filter, click the **X** on the filter.

4. To view a voter record, click the name of the voter in the table.

The voter's record is displayed, and the following five tabs are available for viewing:

- DETAILS
  View the voter's registration information, including Status and Polling Place.

- CHECK-IN HISTORY
  View the voter's check-in history, cancel the check-in, and view custom fields and the correlating signatures. See *Navigating the Check-In History Tab* for more information.
- NAME CHANGES
  View the date and time the change took place, which device was used, the user who made the change, and the original and new name.
- ADDRESS CHANGES
- View the date and time the change took place, which device was used, the user who made the change, and the original and new addresses.
- ADDED VOTER
  View additional information on the added voter.
- LOGS
  View the Poll Pad activity pertaining to the voter.

8.1.4 Navigating the Check-In History Tab for Processed, Registered, or Added Voters

Registered, Processed, and Added Voters have a Check-In History tab in their record that provides the following additional options:

- View check-in signatures
- View the custom fields
- Cancel check-in

8.1.4.1 Viewing the Check-in Signatures

To view the check-in signatures, follow these steps:

1. Locate the voter as instructed in either *Viewing a Registered Voter's record, Viewing a Processed Voter's record,* or *Viewing an Added Voter's record* depending on the voter type.
2. Click the **CHECK-IN HISTORY** tab.
3. Click **View Signatures** in line with the appropriate check-in.

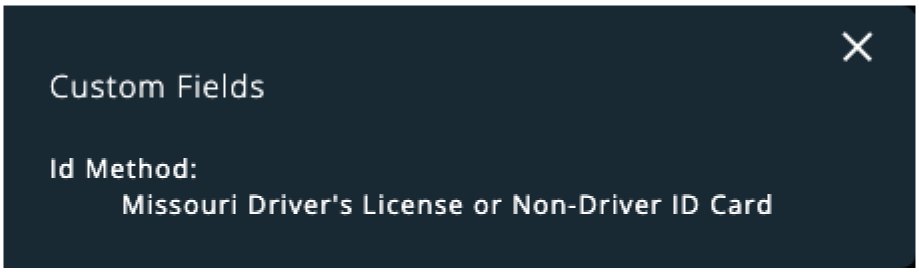
The *Signatures* window appears.

4. Click the **X** to close the *Signatures* window.

8.1.4.2 Viewing Custom Fields

1. Locate the voter as instructed in either *Viewing a Registered Voter's record, Viewing a Processed Voter's record,* or *Viewing an Added Voter's record* depending on the voter type.
2. Click the **CHECK-IN HISTORY** tab.
3. Click **Custom** in line with the appropriate check-in.

The *Custom Fields* window appears.



4. Click the **X** to close the window.

8.1.4.3 Canceling the Check-in

To cancel the check-in and remove it from the voter's record, follow these steps:

1. Locate the voter as instructed in either *Viewing a Registered Voter's record, Viewing a Processed Voter's record,* or *Viewing an Added Voter's record* depending on the voter type..
2. Click the **CHECK-IN HISTORY** tab.
3. Click **Cancel** in line with the appropriate check-in.

The *Cancel Check-In* form appears.

4. Enter *Your Name*.
5. Click to select from the *Cancellation Reason* drop-down list.
6. Enter any pertinent information in the *Details* field.
7. Click **SUBMIT**.

The check-in remains in the voter's record with an added column showing the date and time it was canceled.

8.1.5 Editing a Voter's Record

To edit a voter record, follow these steps:

1. Locate the voter as instructed in either *Viewing a Processed Voter's record* or *Viewing a Registered Voter's record,* depending on the voter type.
2. Click **ACTIONS**, and select **EDIT VOTER**.
3. Update any of the following sections:
    - *Voter Personal Information*

- *Address Information*
- *Polling Place Information*

4. Click **SUBMIT**.

A confirmation message appears.

8.1.6 Viewing Voter Address Changes

To view voter address changes, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **ADDRESS CHANGES**.

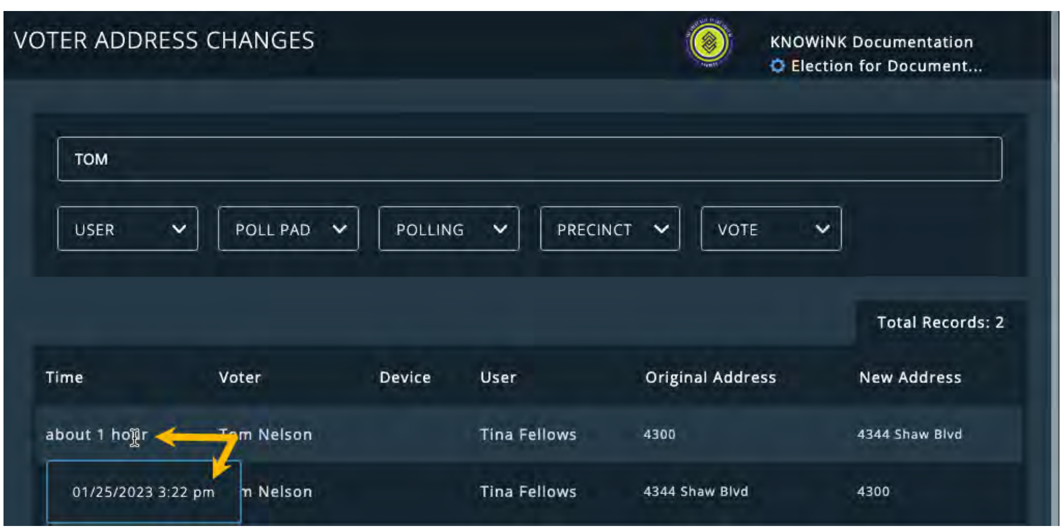
The *VOTER ADDRESS CHANGES* page is displayed.

2. Type the voter's name in the *Search* box.
3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

   - USER
   - POLL PAD
   - POLLING PLACE
   - PRECINCT
   - VOTE STATUS

The *VOTER ADDRESS CHANGES* table automatically updates as you select the search criteria. To remove a filter, click the **X** on the filter.

4. Hover over an item in the *Time* column to see the date and time the change was made.



8.1.7 Viewing Voter Name Changes

To view changes to voter names, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **NAME CHANGES**.

The *VOTER NAME CHANGES* page is displayed.

2. Type the voter's name in the *Search* box.
3. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

- USER
- POLL PAD
- POLLING PLACE
- PRECINCT
- VOTE STATUS

The *VOTER NAME CHANGES* table automatically updates as you select the search criteria.
To remove a filter, click the **X** on the filter.

4. Hover over an item in the *Time* column to see the date and time the change was made.

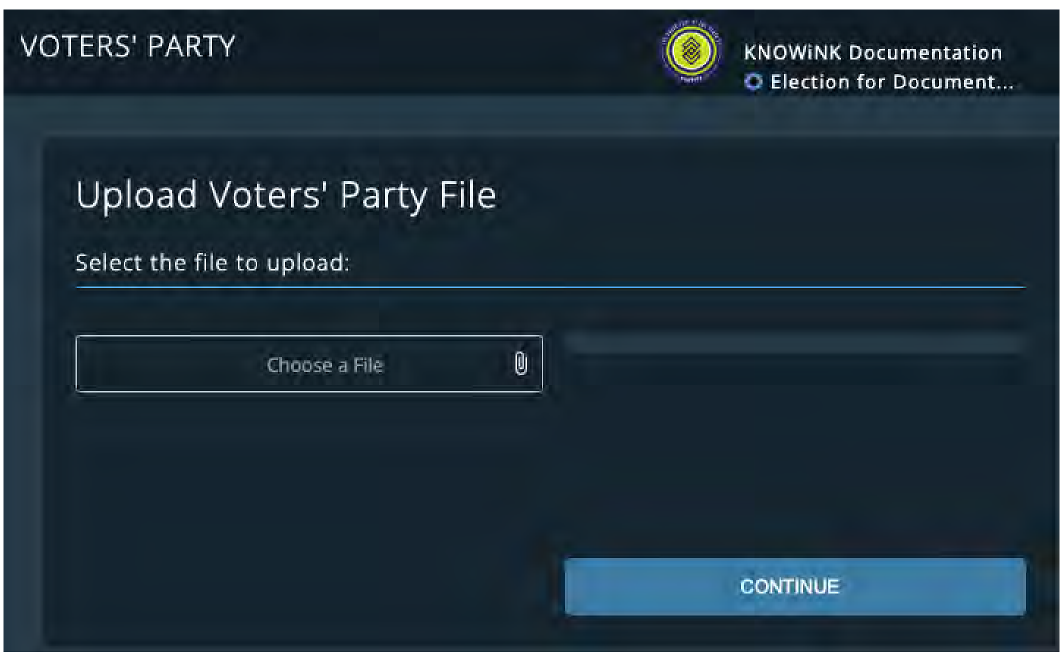
8.1.8 Uploading a Voters' Party File

Contact support for assistance formatting the party file before uploading.

To upload a party file, follow these steps:

1. Click **VOTERS** in the left navigation menu, and select **UPDATE PARTY**.

The *VOTERS' PARTY* page is displayed.



2. Click **Choose a File**.

The open file dialog appears.

3. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

4. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.

5. When processing is complete, click **DONE**.

The system returns to the *VOTERS' PARTY* page.

8.1.9 Updating Voter Statuses in Bulk

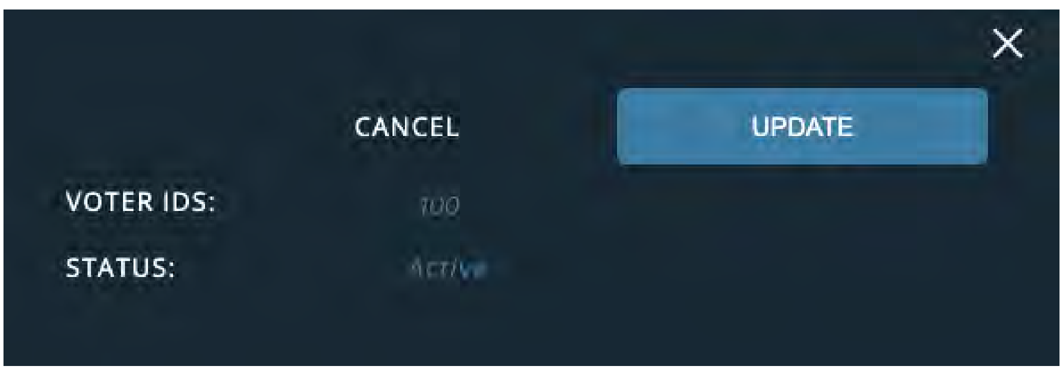
To update the status of multiple voters at once, follow these steps:

1. Click **VOTERS** from the left navigation menu and select **UPDATE STATUSES**.

The *UPDATE VOTER RECORDS* page is displayed.

2. Paste the voter IDs you would like to update.
   Voter IDs must be one per row, and there is a maximum of 100,000 records allowed.
3. Click to select **Voter Status** or **Absentee Status** from the first drop-down list.
4. Click to select the new status to assign the voters from the second drop-down list.
5. Click **CONTINUE**.

A dialog appears with the number of voters and the status you are changing them to.



6. Click **UPDATE**.

8.2 Managing Poll Pad Configurations

Configurations are the feature options and rules that determine how the Poll Pad application is displayed and the functionality of the application. You can add a configuration manually, import a configuration, or copy an existing one.
As configuration options are regularly updated, please contact support for assistance when creating or editing configurations. Configurations should be copied from existing configurations for each new Poll Pad app version deployed to avoid incompatibility with the new version.

8.2.1 Copying Configuration Profiles

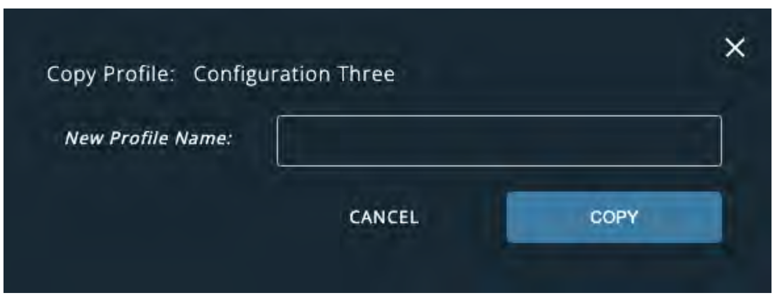
To copy a Poll Pad configuration in ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu and select **CONFIGURATIONS**.

The *CONFIGURATIONS* page is displayed

2. Click the copy icon in line with the configuration profile to copy.

The *Copy Profile* dialog appears.



3. Type the configuration name in the *New Profile Name* field.
4. Click **COPY**.

The *CONFIGURATIONS* page is displayed, and the new configuration profile is listed in the table.

8.2.2 Exporting Configuration Profiles

To export a Poll Pad configuration in ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **CONFIGURATIONS**.

The *CONFIGURATIONS* page is displayed

2. Click the export icon in line with the configuration profile to export.

A *poll_pad_config.csv* file is downloaded to your computer.

8.2.3 Deleting a Configuration Profile

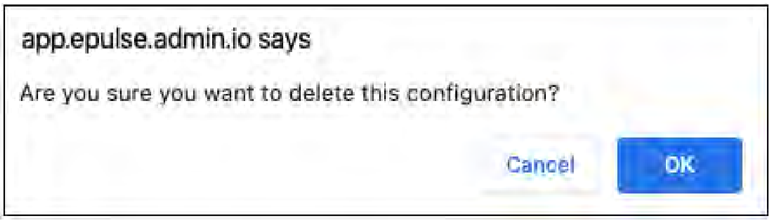
To delete a Poll Pad configuration from ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu and select **CONFIGURATIONS**.

The *CONFIGURATIONS* page is displayed

2. Click the trashcan  icon in line with the configuration profile.

A dialog box requesting confirmation appears.



3. Click **OK**.

The configuration profile is deleted.

8.2.4 Adding a Poll Pad Configuration Manually

To add a Poll Pad configuration in ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **CONFIGURATIONS**.

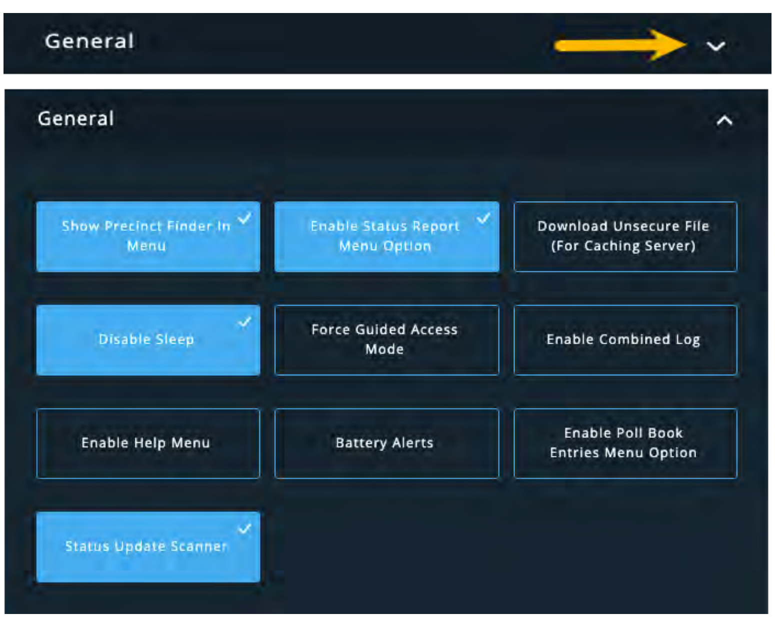
The *CONFIGURATIONS* page is displayed

2. Click **ADD CONFIGURATION**.

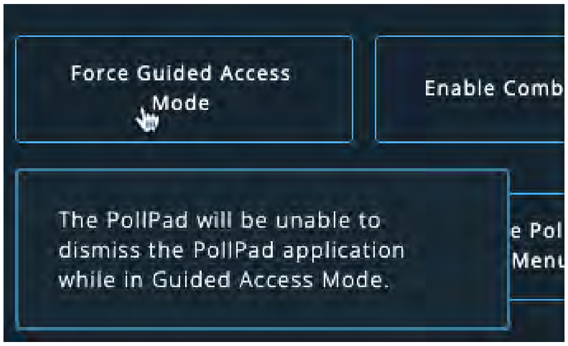
The *Configure PollPad Settings* page is displayed.

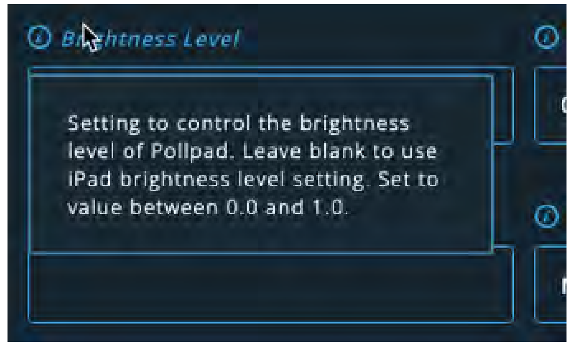
3. Type a name for the configuration in the *Template Name* field.

4. Click the expander arrow  for each category to select the options to assign to the configuration



5. To view configuration information, hover your cursor over the configuration name or the information icon.





6. Once you have made selections in each of the categories, click **SUBMIT**.

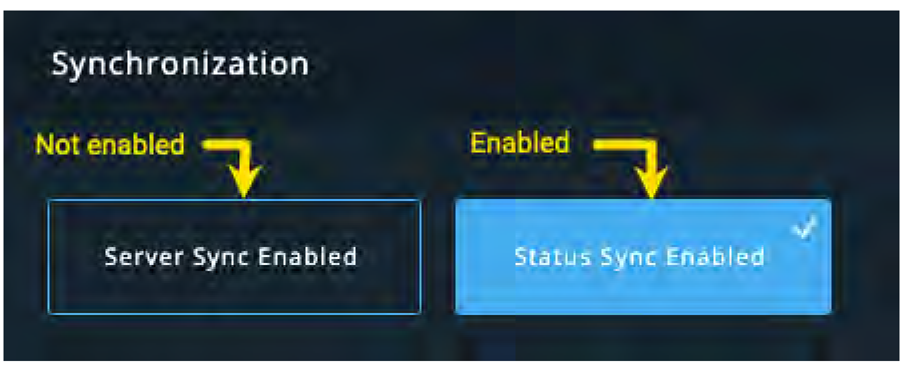
The *CONFIGURATIONS* page is displayed, and the new configuration is listed in the table.

8.2.4.1 Editing a Poll Pad Configuration

1. Click **POLL PADS** in the left navigation menu and select **CONFIGURATIONS**.

The *CONFIGURATIONS* page is displayed

2. Enter the name of the configuration to update in the *Search* box.
3. Click the applicable configuration name.
4. Click the expander arrow for each category to select the options to edit within the configuration.
5. Click to select or deselect options.



6. Once you have edited the needed options, click **SUBMIT**.

A confirmation message appears.

8.2.5 Importing a Poll Pad Configuration

To import a Poll Pad configuration to ePulse, follow these steps:

1. Click **POLL PADS** in the left navigation menu, and select **CONFIGURATIONS**.

The *CONFIGURATIONS* page is displayed

2. Click **IMPORT CONFIGURATION**.

The *Upload Poll Pad Configuration File* page is displayed.

3. Click **Choose a File**.

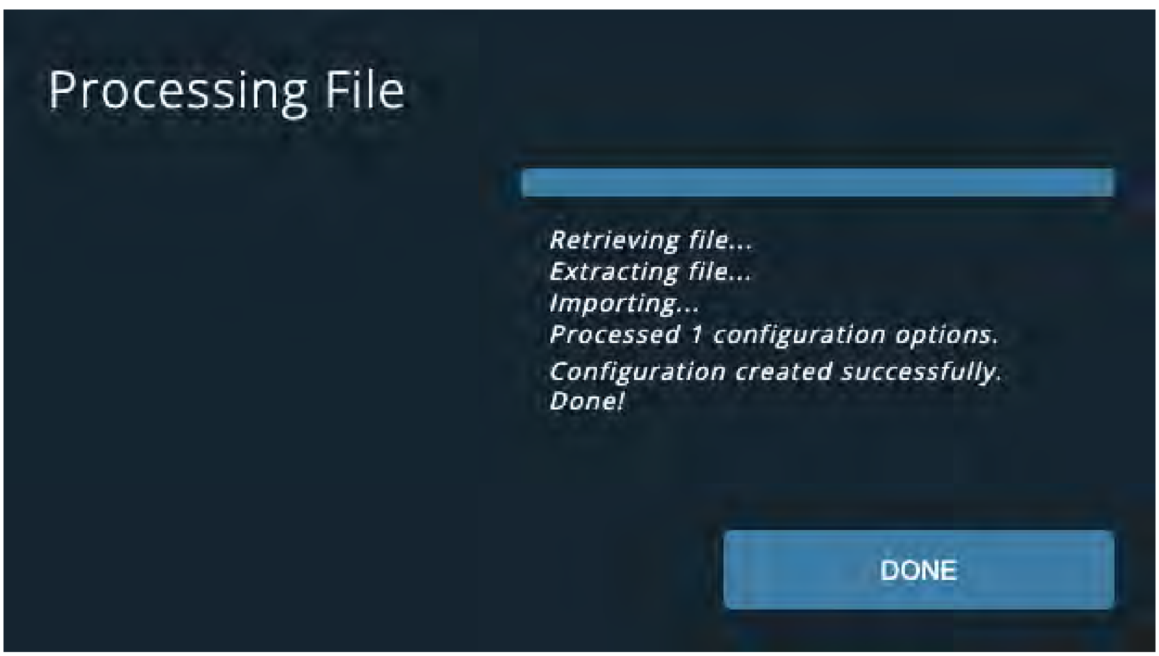
The open file dialog appears.

4. Navigate to the applicable file and double-click it, or highlight it and click **Open**.

The *Choose a File* field is now populated with the uploaded file.

5. Enter the *Configuration Name*.
6. Click **CONTINUE**.

Once the file upload completes, the *Processing File* page is displayed.



7. When the file is done processing, click **DONE**.

The *CONFIGURATIONS* page is displayed, and the imported configuration is listed in the table.

8.3 Accessing Audit Logs

To view or download the Audit Logs in ePulse, follow these steps:

1. Click **REPORTING** in the left navigation menu, and select **AUDIT LOGS**.

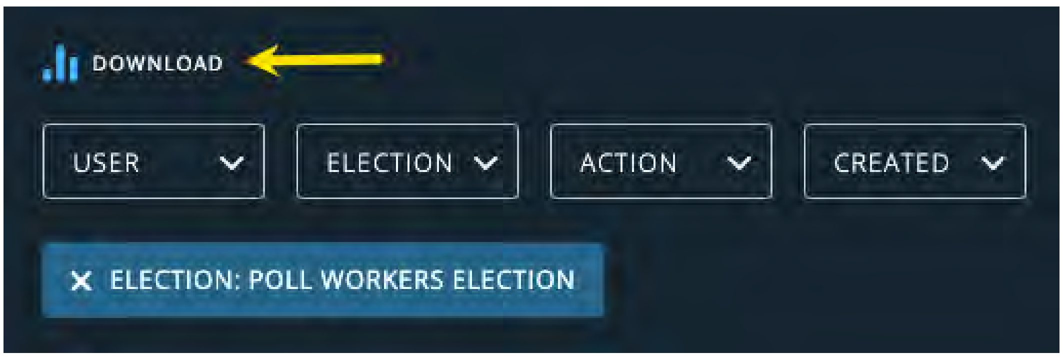
The *AUDIT LOGS* page is displayed.

2. Click to select from the following filter drop-down menus and click **APPLY FILTERS** on each to refine the search results.

- USER
- ELECTION
- ACTION
- CREATED

The *AUDIT LOGS* table automatically updates as you select the search criteria. To remove a filter, click the **X** on the filter.

3. To download the logs as a CSV file, click **DOWNLOAD**.



The *Generating CSV* dialog appears.

4. Click **DOWNLOAD**.

The file is downloaded to your computer.

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