Connecticut Election Management System

Registrar User Manual

Version 3.1

SEPTEMBER, 2018

Contents

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1. SYSTEM REQUIREMENTS

- Windows Operating Systems 7 or higher
- Connecticut EMS is fully supported on the following browsers:
    - Internet Explorer: Version 9.0 or higher
    - Firefox: Version 4.0 or higher
    - Safari: 4.0 or higher
    - Google Chrome: 28.0 or higher
- Minimum screen resolution 1280 x 758 to 1266 x 768
- **TURN OFF YOUR POP-UP BLOCKER**

2. REGISTRAR LOGIN

Purpose: To allow the Registrar to log in with assigned permissions, change a password, and report a problem to or get help from State Admin (SOTS).

Figure 2-1 Login screen

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Figure 2-2 First Time User Registration screen

How to Create First Time User - Registrar

1. The **Login** page will be displayed in the browser (Fig. 2-1).
2. Click on the "*First Time Logging In?*" link in the "Login Information" section.
3. The system will display the **First Time User Registration** screen (Fig. 2-2).
4. Select the town from the "Town" dropdown and "Registrar" from the "Select Role" dropdown. Enter information. Required fields are marked with a red asterisk.
5. Click the "*Submit*" button. The system will display an alert message. Select *OK* to close the pop-up.
6. The system will send a request to State Admin for approval of the new user.
7. Once State Admin has approved the user, the system will send a notification email to the Registrar's email address that was entered on the **First Time User Registration** screen.
8. The Registrar will now be able to log in from the **Login** page (Fig. 2-1). In the "Login Information" section, select "Registrar" from the "Select Role" dropdown, enter Username and Password, and click the "*Login*" button.
9. Passwords expire in 90 days, at which time the user is prompted to enter a new password. The prompt for the password change will begin 10 days prior to the password expiration date. *Please note that you may not use any of your last 3 passwords.*

When the user tries to login after 90 days with an expired password the system will navigate to the **Change Password** screen.

Note: *Passwords must be between 8-26 characters long and must contain at least one character from three of these four-character types:*
- *Uppercase alpha*
- *Lowercase alpha*
- *Numeric*

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- ***Special character***

How to Log In

1. SOTS will send Registrars the URL for the live system. Enter the URL in the browser's address bar and click Enter.
2. Select "Registrar" from the "Select Role" dropdown and enter the Registrar Username and Password on the **Login** Screen (Fig. 2-1). If logging in for the first time, see *Section 2* **How to Create a First Time User – Registrar.**
3. Click the "***Login"*** button.

How to Change a Password

1. From the Dashboard, select the "Maintenance" tab and click on "Change Password" to display the **Change Password** screen (Fig. 2-3).
2. Enter the Old Password, enter the New Password, and re-enter the New Password. Click the "***Change Password***" button. The system displays an alert message.

Figure 2-3 Change Password screen

Note: ***Passwords must be between 8-26 characters long and must contain at least one character from three of these four-character types:***
- ***Uppercase alpha***
- ***Lowercase alpha***
- ***Numeric***
- ***Special character.***

Please note that you may not use any of your last 3 passwords.

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How to Report a Problem or Get Help - from the Login Screen

1. From the **Login** page, click on the "***Report a Problem or Get Help***" link (Fig. 2-4).

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Figure 2-4 Login screen

2. System displays the **Report a Problem or Get Help** screen (Fig. 2-5).

Figure 2-5 Report a Problem or Get Help screen

3. Enter information and summarize your problem or question in the "Message" section. Be sure to include your email address. You may attach a file using the "Browse" feature.
4. Click the "***Send Message***" button. Your message, attachments, and contact information will be sent to the State Admin EMS dashboard.

3. REGISTRAR DASHBOARD

Purpose: TO ALLOW THE REGISTRAR TO ACCESS THE FUNCTIONALITY OF THE CONNECTICUT ELECTION MANAGEMENT SYSTEM.

Connecticut Election Management System

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The Dashboard Basics

Once the user has logged in successfully, the system will display the Dashboard (Fig. 3.1), with the following tabs across the top of the screen that allow the user to access the Connecticut Election Management System functions:

- Dashboard
- Candidates
- Reports
- Head Moderator's Return
- View Stats
- View Question Results
- Maintenance

Figure 3-1 Registrar Dashboard

1. The Dashboard will display four sections: "Active Elections," "Office Requests," "Ballot Ordered Requests" and "Question Requests" (Fig. 3-1). The system will display Active Elections only for the town in which the Registrar is logged in.
2. The Registrar can view the *Offices List*, *List of Nominees*, *Grids Report*, and *Winners Report* for an election by clicking the respective link in the "Active Elections" section.
3. Offices which have been requested by the Town Clerk will be displayed under the "Office Requests" section, with Action status of "Requested," "Accepted" or "Rejected."
4. Ballot Ordered records which have been created by the Town Clerk or Registrar or their Counterpart and are pending review by the Registrar will be displayed under the "Ballot Ordered Requests" section. *(This will be explained in detail in Section 9.)*
5. Questions which have been submitted for state approval by the Town Clerk will be displayed under the "Question Requests" section, with Action status of "Requested," "Accepted" or "Rejected."

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## How to Create Notification of Number of Electors and Polling Places Report

1. From the Dashboard, select the "Maintenance" tab and click on "Notification of # Electors and # Polling Places" to display the **Notification of Number of Electors and Number of Polling Places** screen (Fig. 3-2).

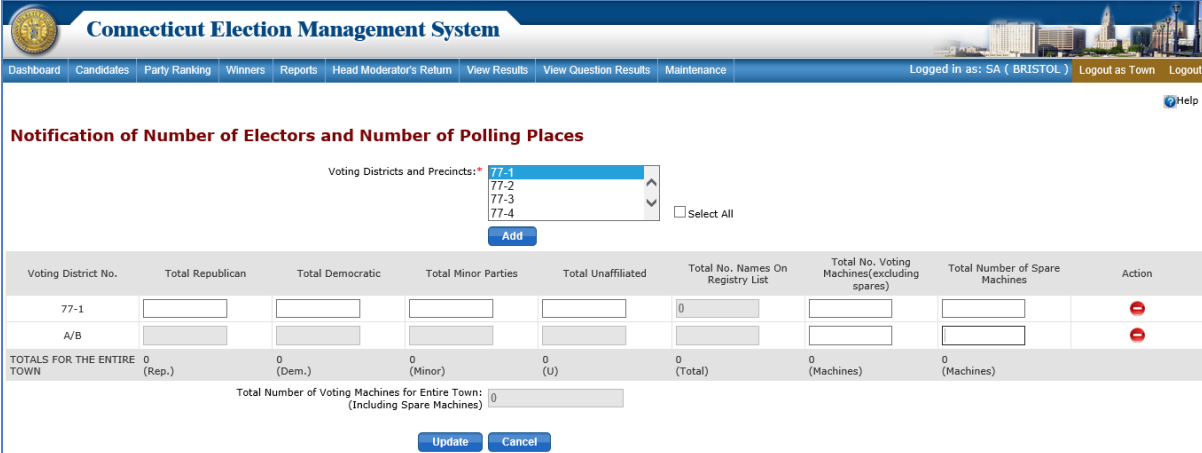## Figure 3-2 Notification of # of Electors and # of Polling Places screen

2. The system displays "No Data Found" until *Notification* data has been entered.
3. Click the "***Notification of Number of Electors and Number of Polling Places***" button to display the **Notification of Number of Electors and Number of Polling Places** screen with Voting Districts and Precincts (Fig. 3-3).

Figure 3-3 Notification of # of Electors and # of Polling Places screen with Voting Districts and Precincts.
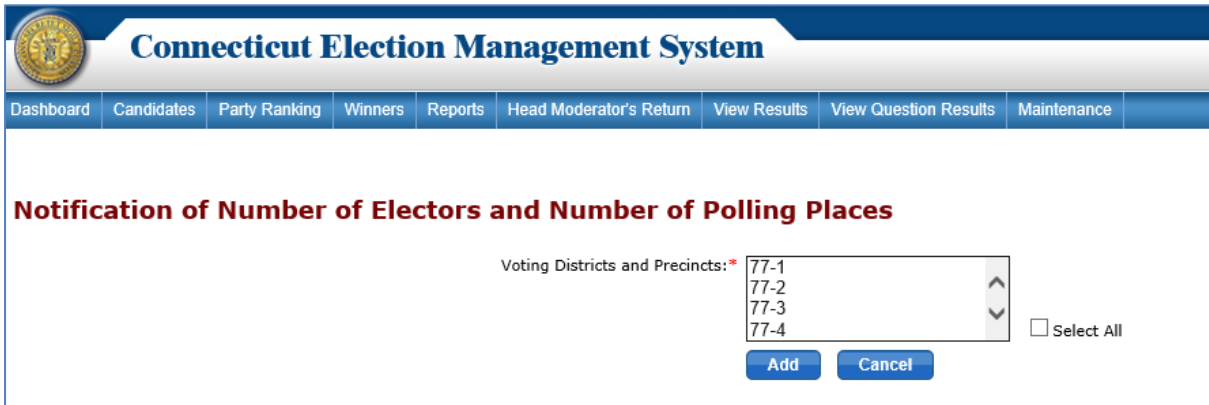
4. Select the Voting District(s) and click the "***Add***" button. The system displays an alert message. Select ***OK*** to display the Notification grid for the selected Voting District(s) (Fig. 3-4).

Figure 3-4 Notification Grid

5. Each town will have an A/B (central absentee counting) precinct available as an optional selection in the dropdown menu. Select the A/B precinct if the town uses centralized absentee counting. Note that only the "Total No. Voting Machines" and "Total Number of Spare Machines" data entry fields will be enabled for the A/B precinct.
6. Enter the data into the fields. As you enter the data, the system will calculate the "Number on the Registry List" and "Total Number of Machines" and populate those fields.
7. Click the "**Save**" button.
8. The system will save the data entered and return to the previous screen, where a summary row of the *Notification* record created will be displayed (Fig. 3-5).

Figure 3-5 Notification of # of Electors and # of Polling Places screen - with Summary Row

9. To edit a *Notification* report, click the "**Edit**" icon. The system displays an alert message. Select **OK** to continue to the **Notification** grid or select **Cancel** to close the pop-up without taking any action.
10. After updating the details, click the "**Update**" button. The system displays an alert message. Click **OK** to update the *Notification* report.
11. The system will save the data entered and return to the previous screen. A summary row for the amended *Notification* report will display. The original *Notification* summary row, and a summary row for any previous amendments, will also display.

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12. To delete a *Notification* report, click the "***Delete***" icon. The system displays an alert message. Select ***OK*** to delete the report or select ***Cancel*** to close the message without taking any action.

13. To print the most recent *Notification* report, select the "Reports" tab from the Dashboard to display the **Reports** screen. Click the radio button next to "Notification of Number of Electors and Number of Polling Places." Click the "**Generate Report**" button to generate the *Notification* report. (*More information about reports in Section 5. Reports.)*

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4. MAINTAIN POLLING PLACE

Purpose: TO ALLOW THE REGISTRAR TO ADD, EDIT, DELETE AND ARCHIVE POLLING PLACE(S).

How to Maintain (Add/Edit/Delete/Archive) Polling Places

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Polling Place" to display the **Maintain Polling Place** screen (Fig. 4-1).
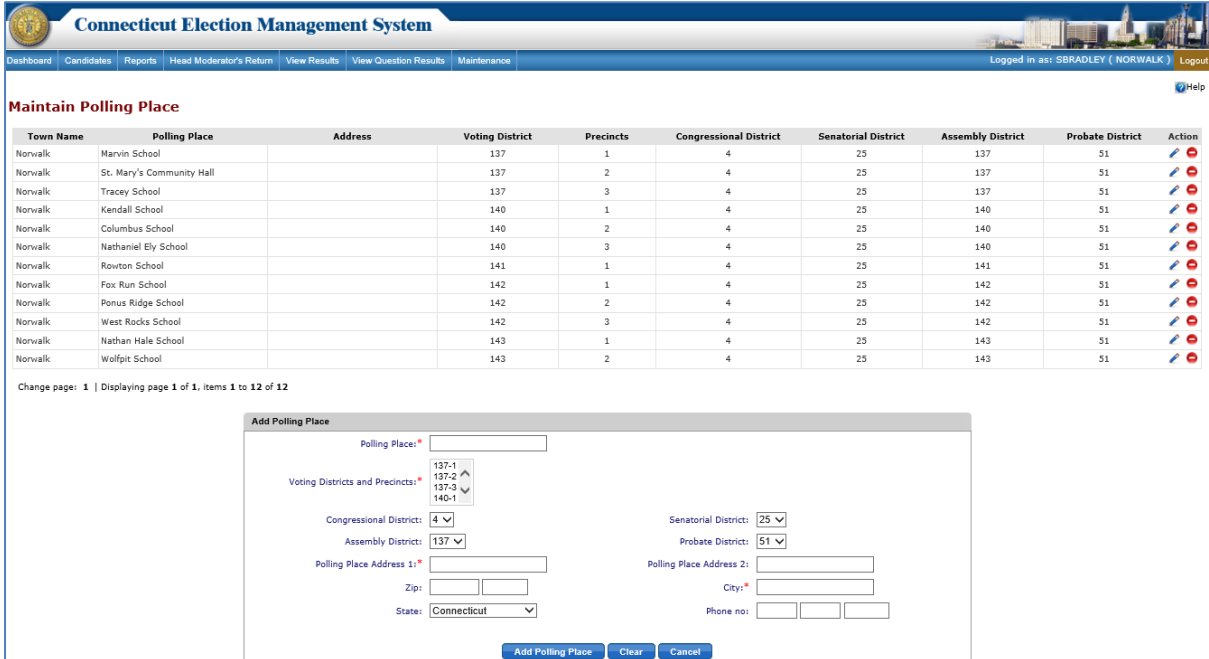
Figure 4-1 Maintain Polling Place

2. To add a polling place, click the "***Add Polling Place***" button. The system will display data entry fields in the "Add Polling Place" section (Fig. 4-2).

Figure 4-2 Maintain Polling Place screen– Add Polling Place

3. Enter the polling place information. A red asterisk indicates a required field.
4. Click the "***Add Polling Place***" button to save the polling place.
5. The system displays an alert message. Select ***OK*** to add the polling place and return to the **Maintain Polling Place** screen.
6. To edit a polling place, click the "***Edit***" icon next to the polling place to edit. The system will display data entry fields populated with the current polling place information.
7. Make any desired changes to polling place information and click the "***Update***" button. The system displays an alert message.
8. To delete a polling place, click the "***Delete***" icon next to the polling place to be deleted. The system displays an alert message. Select ***OK*** to delete the polling place or select ***Cancel*** to go back to the **Maintain Polling Place** screen.
9. To archive a polling place, select the checkbox next to the polling place to archive and click the "***Archive***" button. The system displays an alert message. Click ***OK*** to archive the polling place.
10. To unarchive a polling place, select the "***Un-Archive***" button. The system displays an alert message. Click ***OK*** to display a pop-up with archived polling places (Fig. 4-3).

Figure 4-3 Maintain Polling Place – Un-Archive Polling Place

11. Select the checkbox next to the polling place to un-archive and click the "***Un-Archive***" button. An alert message will display. Click ***OK*** to un-archive the polling place.

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5. ASSIGN POLLING PLACE TO ELECTION

Purpose: TO ALLOW THE REGISTRAR TO ASSIGN POLLING PLACES TO ELECTIONS.

How to Assign Polling Places to an Election

1. From the Dashboard, select the "Maintenance" tab and click on "Assign Polling Place to Election" to display the **Assign Polling Place to Election** screen (Fig. 5-1).

Figure 5-1 Assign Polling Place to Election screen

2. To assign polling places, select the election from the dropdown.
3. Select one or multiple polling places to assign by checking the checkbox(es) next to the polling places to be assigned.
4. To select all polling places, use the "Select" checkbox.

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5. Click the "***Assign Polling Place to Election***" button. The system displays an alert message.

6. Select ***OK*** to assign polling place(s) or select ***Cancel*** to return to the screen without taking any action. If ***OK*** is selected, the system adds the polling place(s) and displays the information in a grid below the polling place list (Fig. 5-2).

Figure 5-2 Polling Places Assigned to Election

7. To unassign a polling place, click the "***Delete***" icon. The system displays an alert message. Select ***OK*** to unassign the polling place or select ***Cancel*** to go back to the **Assign Polling Place to Election** screen without taking any action.

Additional Information:

1. The Registrar can Edit/Delete a polling place if it is NOT assigned to any election.

2. If a polling place is assigned to an election & NO Candidate vote results and stats are entered for that election, then
    a. Registrar can edit the polling place details.
    b. Registrar can delete the polling place by first un-assigning it from the election.

3. If a polling place is assigned to an election and the Candidate Results, Questions Results and Stats are entered and saved by Head Moderator for that election, then
    a. Registrar can edit the polling place name & address only.
    b. Registrar can delete the polling place by first un-assigning it from the election.
    c. Note: The un-assignment of polling place will delete the saved stats.

4. If a polling place is assigned to an election & Candidate Results, Questions Results and the Stats are submitted by HM for that election, then
    a. Registrar CANNOT edit the Polling place details. (See #5 below.)
    b. Registrar CANNOT delete the polling place.
    c. Registrar CANNOT un-assign the polling place.

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5. When the Registrar edits a polling place as in #4(a) above, then the system will create a new polling place with the updated information and must keep the old polling place details as-is to maintain its previous election history.

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6. MAINTAIN HEAD MODERATOR/MODERATOR/DATA ENTRY USER

Purpose: To allow the Registrar to maintain (add/edit/delete) the roles of Head Moderator, Moderator, and Data Entry as Election Management System Users.

How to Add, Edit and Delete Moderator and Data Entry Roles

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Moderator/Head Moderator" to display the **Maintain Moderator/Head Moderator** screen. The system displays "No Moderators Found" until a Moderator has been added (Fig. 6-1).

Figure 6-1 Maintain Moderator/Head Moderator screen

2. To add a moderator, click the "**Add Moderator**" button.
3. The **Maintain Moderator/Head Moderator** data entry screen will display (Fig. 6-2).

Figure 6-2 Maintain Moderator/Head Moderator – Data Entry screen
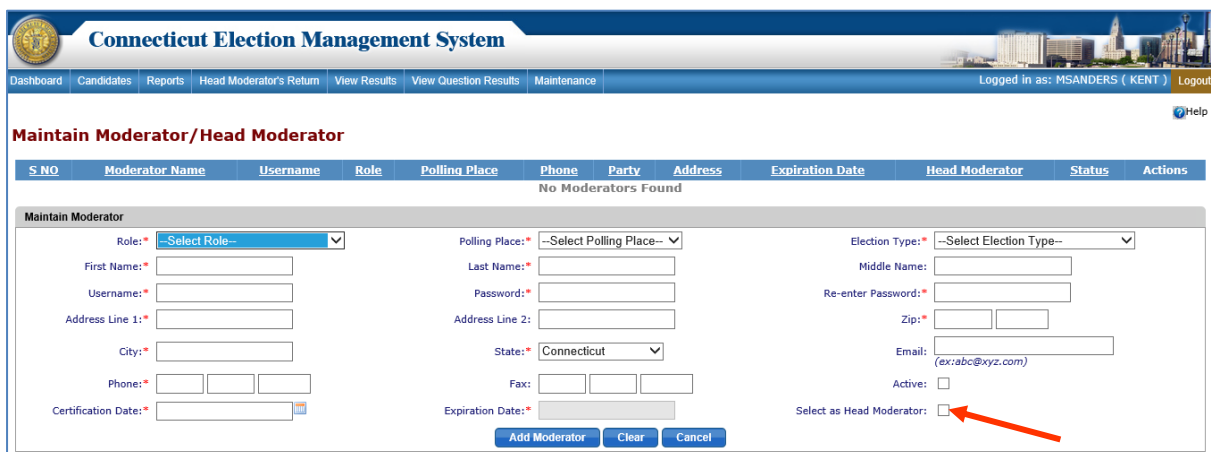
4. The following roles are available from the "Role" dropdown:
   - Head Moderator
   - Regular Moderator
   - Regular or Absentee Moderator
   - Absentee Moderator
   - Data Entry.
5. Select a role and enter the new user's information. Required information is indicated by a red asterisk.
6. To indicate that a Regular Moderator or Absentee Moderator has Head Moderator permissions, check the "Select as Head Moderator" checkbox (indicated by arrow in Fig. 6-2).
7. Click the "**Add Moderator**" button. The system displays an alert message. Select **OK** to add the moderator and to display the Moderator grid (Fig. 6-3).

Figure 6-3 Moderator Grid

8. Username and password are required for Head Moderator and Data Entry, but not for Regular Moderator or Absentee Moderator.
9. If Head Moderator, Absentee Moderator, or Data Entry is selected, the "Polling Place" dropdown is disabled.
10. The Regular Moderators created for one Party-based Election type cannot be used for another Party based-Election type.
11. To edit a Moderator, click the "**Edit**" icon. The system displays an alert message. Select **OK** to continue to the data entry screen for that moderator or select **Cancel** to close the pop-up without taking any action.
12. After updating the details, click the "**Update**" button. The system displays an alert message. Click **OK** to update the moderator's information.
13. To delete a moderator, click the "**Delete**" icon. The system displays an alert message. Select **OK** to delete the record or select **Cancel** to close the message without taking any action.

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7. VIEW CANDIDATE(S)

Purpose: TO ALLOW THE REGISTRAR TO VIEW CANDIDATES. INFORMATION FROM THIS SCREEN WILL FLOW INTO PRE- AND POST-ELECTION REPORTS.

How to View Candidates

1. From the Dashboard, select the "Candidates" tab and click on the "View Candidate(s)" menu item to display the **View Candidate(s)** screen (Fig. 7-1).

Figure 7-1 View Candidate(s)

2. To search for a candidate, select an election and enter information in one or more of the following fields: Office, Party, Name on Ballot, First Name, and Last Name. Partial names may be entered.
3. The "Name on Ballot" uses type ahead search - begin typing the candidate name, and the dropdown will display a list of candidates whose names begin with those letters.
4. Click the "*Search*" button to display the search results in a grid below the "Search Candidate" section (Fig. 7-2).

Figure 7-2 View Candidates – Search Results

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8. BALLOT ORDERED

Purpose: TO ALLOW THE REGISTRAR (AND TOWN CLERK) TO CERTIFY THE NUMBER OF BALLOTS ORDERED FOR A POLLING PLACE/DISTRICT.

How to Create and Submit Ballot Ordered

1. From the Dashboard, select the "Maintenance" tab and click on "Ballot Ordered" to display the **Ballot Ordered** screen. Until a Ballot Ordered record has been created, the system displays "No Data Found" (Fig. 8-1).

Figure 8-1 Ballot Ordered

2. To create Ballot Ordered for a polling place, click the "***Enter Ballot Ordered***" button to display the **Ballot Ordered** data entry screen (Fig. 8-2).

Figure 8-2 Ballot Ordered – Data Entry screen

3. Select an "Election/Primary Date" and "Polling Place Name" from the respective dropdown.
   Note: The "Polling Place Name" dropdown defaults to 'Select Polling Place' option.
4. Enter the "Number of Ballots Ordered" and "Percentage of Ballots per Voter Ordered."

5. Enter Historical Information for the last 4 similar elections. As the "Number of Registered Voters" and "Number Checked as Having Voted" are entered, the system will calculate the "Turnout Percentage." To add rows, click the "➕" icon.

6. Once data is entered, click the "***Certify***" button. The system displays an alert message. Select **OK** to save Ballot Ordered details and return to the previous screen, where a summary row will be displayed for the Ballot Ordered record created.

7. To view Ballot Ordered records that have previously been entered for an election, select the election from the dropdown and click the "***Search***" button. The system displays the Ballot Ordered summary rows for that election.

8. To edit a Ballot Ordered record, click the "***Edit***" icon next to the record to be edited. The system will display an alert message. Select **OK** to continue to the **Ballot Ordered** grid, which will be populated with the Ballot Ordered details.

9. After updating the Ballot Ordered details, click the "***Update Certification***" button. The system will display an alert message.

10. To delete a Ballot Ordered record, click the "***Delete***" icon. The system displays an alert message. Select **OK** to delete the record or select ***Cancel*** to close the pop-up without taking any action.

11. Both the Registrar and the Town Clerk must certify the Ballot Ordered. Either may create the initial Ballot Ordered record for a polling place.

12. If the Town Clerk initially creates and certifies the Ballot Ordered, the system will display a summary row for the Ballot Ordered on the Registrar's dashboard under "Ballot Ordered Requests" (Fig. 8. 3).

Figure 8-3 Dashboard - Ballot Ordered Requests

13. To certify the Ballot Ordered and submit to the state, click "***View***." Click **OK** to close the alert message and display a pop-up window with the Ballot Ordered that has been certified by the Town Clerk (Fig. 8-4).

Figure 8-4 Ballot Ordered – Submit to State

14. Click the "***Submit to State***" button. An alert message will display. Click ***OK*** to certify and submit the Ballot Ordered to the state.
15. If the Registrar has initially created and certified the Ballot Ordered, the record will display on the Town Clerk dashboard. The Town Clerk will review, certify, and submit to the state.
16. Either the Registrar or the Town Clerk can edit the most recent Ballot Ordered, regardless of the user who initially created it. Any edit will send an updated record to the appropriate dashboard.
17. To print the *Ballot Ordered* report, select "Ballot Ordered" from the "Reports" screen and click the "***Generate Report***" button. The system will generate a *Ballot Ordered* report.
18. The Registrar of Voters must have assigned at least one polling place to the primary/election before a Ballot Ordered can be created for that election.
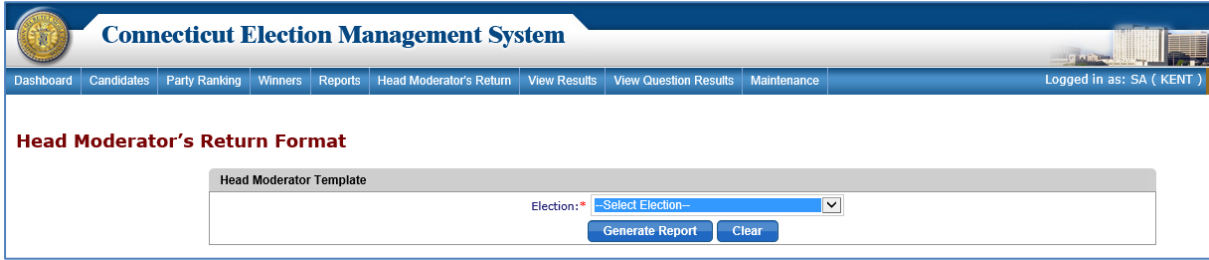
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9. HEAD MODERATOR'S RETURN BY TOWN FORMAT

Purpose: TO ALLOW THE REGISTRAR OF VOTERS OR TOWN CLERK TO GENERATE A HEAD MODERATOR'S RETURN BY TOWN FORMAT. THIS FORM IS A PAPER COPY OF THE HEAD MODERATOR'S RETURN.
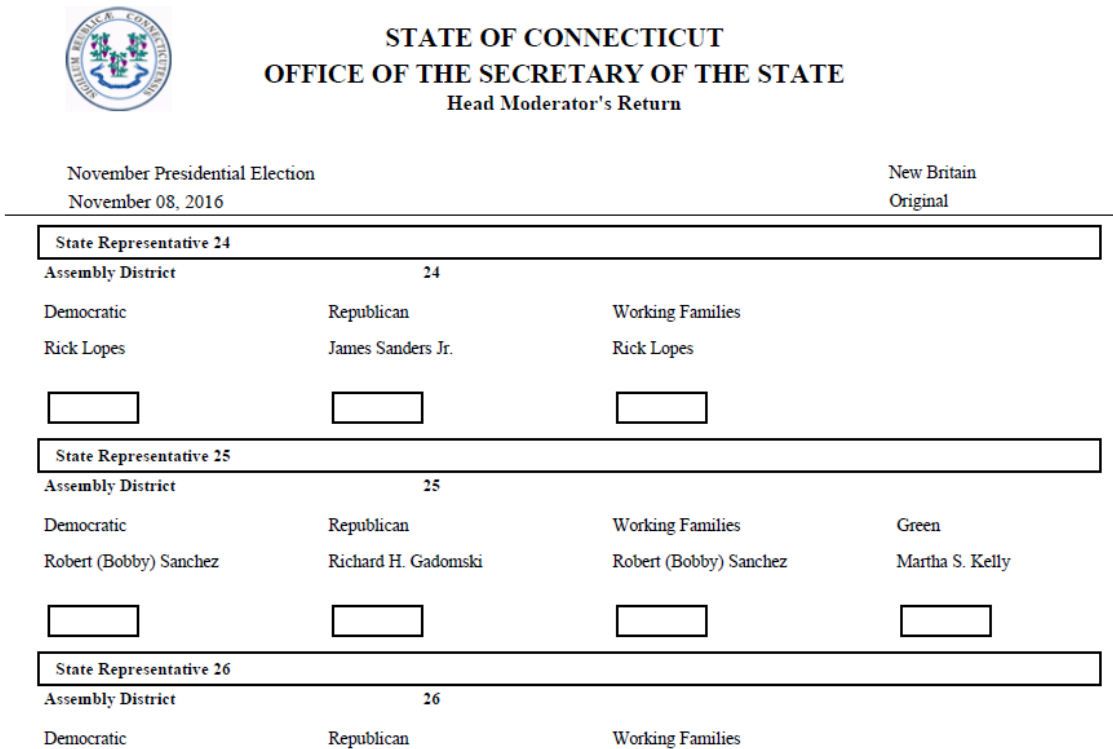
How to Generate the Head Moderator's by Town Format
1. From the Dashboard, select the "Reports" tab and click on "Head Moderator's Return by Town Format" to display the **Head Moderator's Return Format** screen (Fig. 9-1).

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Figure 9-1 Head Moderator's Return by Town Format

2. Select the election and click the "***Generate Report***" button to generate the blank *Head Moderator Return* template with all the Candidates and Offices listed for the selected election in PDF format (Fig.9-2).

Figure 9-2 Head Moderators Return by Town Format – PDF

3. The report can be printed from a configured printer.

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10. HEAD MODERATOR'S RETURN

Purpose: TO ALLOW THE REGISTRAR TO VIEW THE HEAD MODERATOR'S RETURN.

How to View the Head Moderator's Return

1. From the Dashboard, select the "Head Moderator's Return" tab to display the **Head Moderator's Return** screen (Fig. 10-1).

Figure 10-1 Head Moderator's Return screen
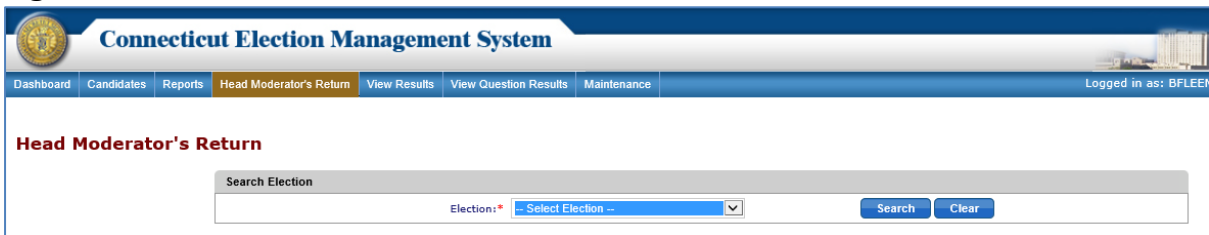
2. If returns have previously been entered, a summary row for each return will be displayed. To filter returns by election, select an election from the dropdown and click the "**Search**" button to display the results for the selected election that have been submitted by Head Moderator. Each original and amended return that has been submitted for the selected election will be displayed and available to View (Fig. 10-2).

Figure 10-2 Returns for a Selected Election

3. To view the results, click on the "**View**" link in the "Actions" section to display a pop-up window that shows the results submitted by the Head Moderator (Fig. 10-3).
4. Click the "**Close**" button to close the pop-up window.

Figure 10-3 Head Moderator's Return Results

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11. VIEW STATS

Purpose: To Allow the Registrar to view and Print the stats submitted by Head Moderator.

How to View and Print Municipal Stats submitted by Head Moderator

1. From the Dashboard, select the "View Stats" tab from Menu Bar to display the **View Stats** screen (Fig. 11-1).

Figure 11-1 View Stats

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2. Select the election and click the "**Search**" button to display the results submitted by the Head Moderator for the selected election.

3. Click the "**View**" link in the "Actions" section to display a pop-up window that shows the stats submitted by the Head Moderator (Fig. 11-2).

Figure 11-2 Stats

4. The stats may be printed from this screen by right clicking and selecting "Print." Use the scroll bars to view all stats.

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12. VIEW QUESTIONS RESULTS

Purpose: TO ALLOW THE REGISTRAR TO VIEW THE QUESTIONS RESULTS SUBMITTED BY THE HEAD MODERATOR.

How to View Questions Results

1. From the Dashboard, select the "View Question Results" tab to display **View Questions Results** screen (Fig. 12-1).

Figure 12-1 View Questions Results screen

2. Select the election and click the "***Search***" button to display the Questions Results submitted by Head Moderator in the grid below the "Search Election" section.
3. Click the "***View***" link in the "Actions" section to display a pop-up window that shows the Question Results submitted by Head Moderator (Fig. 12-2).
4. Click the "***Close***" button to close the pop-up.
5. Click on "***Generate Report***" to display a report in PDF format that shows the Questions Results information. The "***Generate Report***" link will not be available until the Head Moderator has submitted results.

## Figure-12-2 Question Results

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13. REPORTS

Purpose: To Allow the Registrar to Generate Reports Based on the Selection of Election and Office. All the Reports can be Generated in PDF and Excel Format and Downloaded to another Device or Printed from a Configured Printer.

How to Generate Reports

1. From the Dashboard, select the "Reports" tab to display the **Reports** screen (Fig. 13-1).

Figure 13-1
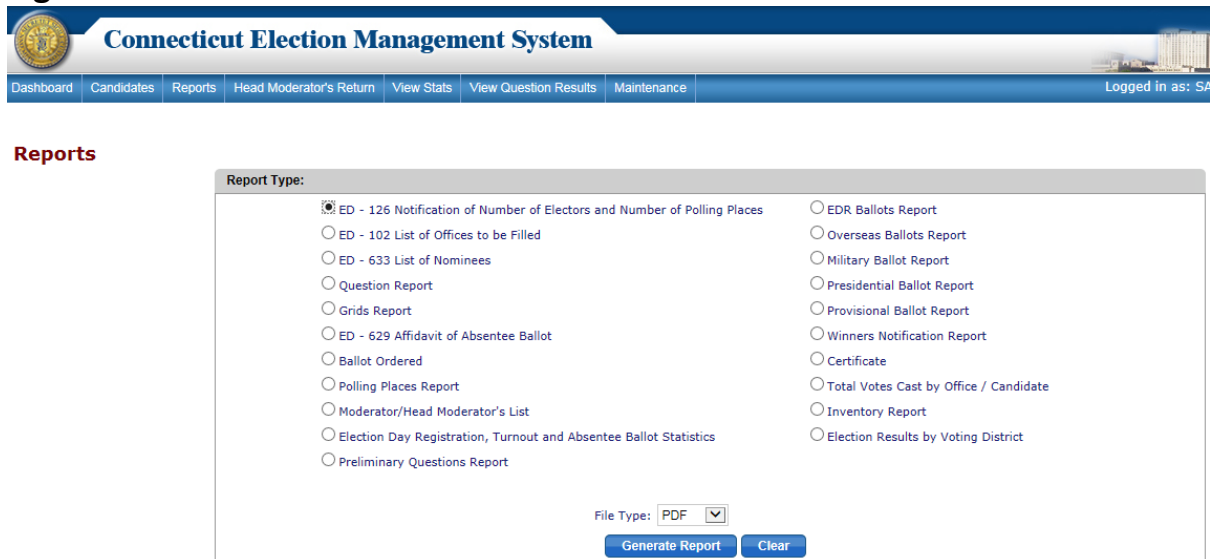
Below is the list of reports:
- ED – 126 Notification of Number of Electors and Number of Polling Places
- ED – 102 List of Offices to be Filled
- ED – 633 List of Nominees
- Question Report
- Grids Report
- ED – 629 Affidavit of Absentee Ballot
- Ballot Ordered
- Polling Place Report
- Moderator/Head Moderator's List
- Election Day Registration, Turnout and Absentee Ballot Statistics
- Preliminary Questions Report
- EDR Ballots Report
- Overseas Ballots Report
- Military Ballot Report
- Presidential Ballot Report
- Provisional Ballot Report
- Winners Notification Report
- Certificate
- Total Votes Cast by Office / Candidate
- Inventory Report
- Election Results by Voting District

2. In order to generate the reports related to results, the Head Moderator's Return, Stats and Question Results must have been approved/accepted.
3. In order to generate the reports related to the winners, the winners must have been announced.
4. Select the report by clicking the radio button beside the desired report. If the report selected is specific to election or office, dropdowns will be enabled to select the election and/or offices.
5. Click the "**Generate Report"** button to generate the report.
6. Reports can be generated only for the statistics/results for the town in which the Registrar is logged in.

How to Generate a *Statement of Vote*

1. To generate a *Statement of Vote*, select the "Reports" tab from the Dashboard and click on "Statement of Vote." The **Statement of Vote** screen will display (Fig. 13-2).

Figure 13-2 Statement of Vote screen
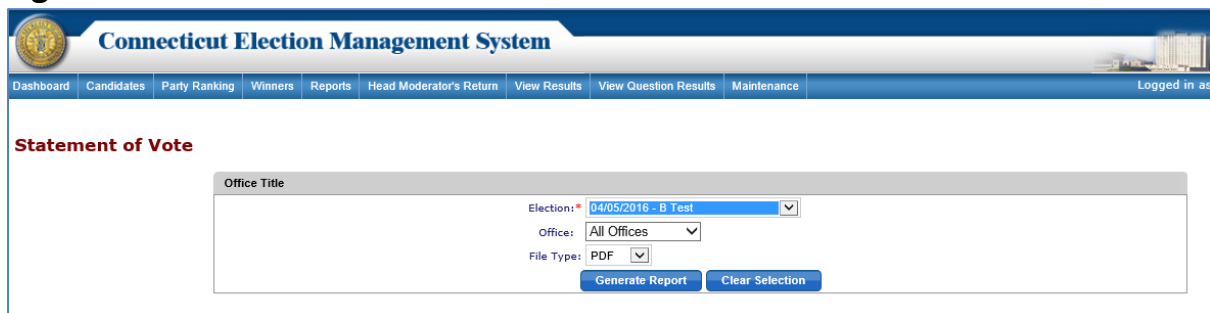
2. Select the Election, Office(s), and File Type from the respective dropdowns and click the "**Generate Report**" button.
3. The system will generate the *Statement of Vote* for the selected election and office(s).

How to Generate a Tally Sheet

1. To generate a *TALLY SHEET*, which can be printed and used for manual data entry at polling places, select the "Reports" tab from the Dashboard and click on "TALLY SHEET" The **TALLY SHEET** screen will display (Fig. 13-3).

Figure 13-3 TALLY SHEET
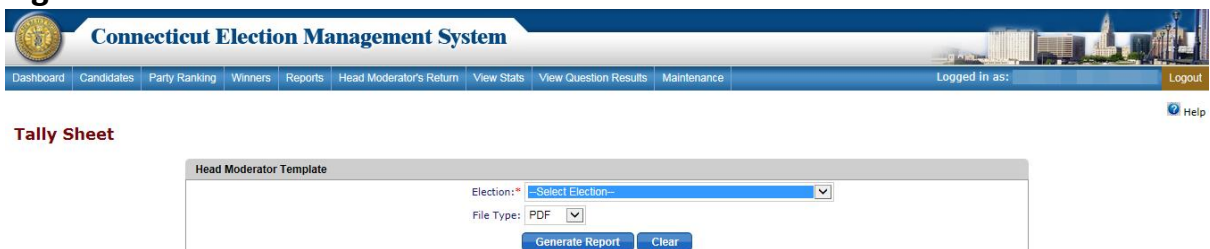
2. Select the Election from the dropdown and click the "**Generate Report**" button.

3. A user may generate the blank Head Moderator Return with all the Candidates & Offices listed for an Election in a PDF; the user will print the form and votes will be manually entered (Fig. 13-3).

4. Figure 13-3 – sample output TALLY SHEET

How to Generate a *Moderator's Return* form

1. To generate a *Moderator's Return*, select the "Reports" tab from the Dashboard and click on "Moderator's Return." The **Moderator's Return** will display as a fillable PDF (Fig. 13-4).

2. Enter the information to prepare the form for printing. The form can be printed and distributed for use in polling places. This is a stand-alone form; that is, when information is entered in the fields on this form, the information does NOT populate any fields in the Election Management System.

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Figure 13-4 Moderator's Return

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MODERATOR'S RETURN

Enter your town's information here to prepare the
Moderator's Return for printing.

Town Name: _____

Voting District: _____

Polling Place: _____

Election Date: _____

Election Type: [Election - Presidential ▾]

Moderator's Return Type:
- ○ Central Count Return
- ○ Polling Place Return (No Absentees)
- ● Polling Place Return (With Absentees)

Delivery of Tabulator and Ballots:
- ○ Delivered by Registrars
- ● Delivered by Election Officials
- ○ Delivered by Police Officer

Pollworker Sheets:
- ● Use Recommended Form
- ○ Prefer to make own sheets for training and oath (must be filed separately with Town Clerk)

[🖨 Print Now]

[Clear Form Fields]   [⊕ Edit Tally Sheets]

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NOTES:_____

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14. MAINTAIN INVENTORY

Purpose: TO ALLOW THE REGISTRAR TO ADD/MAINTAIN INVENTORY FOR A TOWN BASED ON THE ELECTION. ONCE SUBMITTED, THE USER CAN GENERATE A MAINTAIN INVENTORY REPORT FROM THE REPORTS TAB.

How to Maintain Inventory

1. From the Dashboard, select the "Maintenance" tab and click on "Maintain Inventory" to display the **Maintain Inventory** screen. Until inventory has been added, the system displays "No Data Found" (Fig. 14-1).

Figure 14-1 Maintain Inventory screen

2. To display inventory previously entered, select the election and click the "*Search*" button. The system displays any inventory matching the search criteria.
3. Click the "*Add Inventory*" button to display the Maintain Inventory data entry screen (Fig. 14-2).
4. Figure 14-2 Maintain Inventory – Data Entry screen

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5. Select the Election from the "Election Name" dropdown. Select the Moderator(s), using the type ahead option, and click the "***Add***" button. The system displays the Moderator and contact number below the search field.
6. Enter the inventory details and click the "***Add Inventory***" button. An alert message will display.
7. Select ***OK*** to add the inventory record and display the **Maintain Inventory** screen (Fig. 14-3).

Figure 14-3 Maintain Inventory screen - with Summary Row

Connecticut Election Management System

| Dashboard | Candidates | Reports | Head Moderator's Return | View Results | View Question Results | Maintenance | | Logged in as: SBRADLEY (N |

Maintain Inventory

Search Election

Election:* | 04/05/2016 - B Test ▾ | Search Clear

Town Clerk Name	Town Clerk Contact Number	Election	Actions
Susan Bradley	555-555-5555	04/05/2016 - B Test	🔍 ✏ ⊖

Change page: **1** | Displaying page **1** of **1**, items **1** to **1** of **1**   Add Inventory

8. To view the inventory, click the "***View***" icon.
9. To edit the inventory, click the "***Edit***" icon to display the **Maintain Inventory** screen. The data entry fields will be populated with information for the polling place inventory.
10. After updating the details, click the "***Update***" button. The system will display an alert message.
11. To delete the inventory, click the "Delete" icon.   The system will display an alert message. Select ***OK*** to delete the inventory or select ***Cancel*** to go back to the **Maintain Inventory** screen.

NOTES:_____

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