May 22, 2015

STATE CERTIFICATION TESTING
OF VOTING SYSTEMS
NATIONAL CONFERENCE
Election Day

Pollbook Pilot

*Identify* current ePollbook pro’s and con’s

- Obtain data from all departments that work with our ePollbook product
Election Day

Pollbook Pilot

Identify current ePollbook pro’s and con’s

- Schedule meeting for DCBOE Department Heads to discuss ePollbook Project/Pilot
  - Executive Director
  - VR System
  - Lead Tech
  - Voter Services
  - Technical Team
Election Day

Pollbook Pilot

**Identify** current ePollbook pro’s and con’s

- Schedule, collaborate and combine all findings from information gathered from all parties involved in project
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Pollbook Pilot

Identify the type of vendors to participate in pilot

• Obtain data concerning those existing vendors from our Election Advisor, Executive Director, Technical and election sources
Identify the type of vendors to participate in pilot

- Identify any jurisdiction(s) that are currently using the vendor(s) that have been identified
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Pollbook Pilot

**Identify** the type of **vendors** to participate in pilot

- Conduct fact findings to obtain any positive and negative information
Identify vendors ePollbook platform (Hardware and Software)

- What operating system “OS” is being used?
- How many known vulnerabilities exist for OS?
- Have these vulnerabilities been resolved or remediated?
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Pollbook Pilot

**Identify vendors ePollbook platform** (Hardware and Software)

- What other software or applications are installed in order for ePollbook solution to operate?
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Pollbook Pilot

Identify vendors ePollbook platform (Hardware and Software)

• How many peripherals are needed for complete setup?
Identify Security concerns

- Visit all software and hardware security resources such as NIST, vendor’s website, etc.
- Verify application methods and network communication methods.
- Identify and validate physical security concerns.
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Pollbook Pilot

Initial announcements to (selected) Vendors

• Determine how many vendors will participate
• Schedule conference call/webinar with vendors to discuss DCBOE piloting/evaluating their ePollbook product.
Election Day
Pollbook Pilot

Initial announcements to (selected) Vendors

- Discussion with vendors to assess whether product covers basic needs and other internal functions of what an ePollbook should cover
- Inform vendors of our expectations and requirements
Notify Election Vendor(s) that were selected to participate in 2015

- Provide each vendor with deadline dates for receiving ePollbook solutions and evaluation period
- Provide requirements that vendors must adhere to in order to be selected to participate in 2015 Elections
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Pollbook Pilot

Operational and Acceptance Procedures

• Identify key personnel that will test ePollbook solution
  ➢ Lead Tech/Logistics Team
  ➢ Trainers/Pollworkers
  ➢ Voter Services Staff (Seniors)
  ➢ Technical Staff/Management
Election Day

Pollbook Pilot

Operational and Acceptance Procedures

- Create testing matrix for each functional role
  - Define all aspects of the manual process
    (Lead Tech/Logistical Team)
    a) Unpacking and setting up the ePollbook Solution
    b) Performing final check to assure connectivity, battery life and printer is working
    c) Device is assigned to correct polling place and correct mode is set (EV or ED)
    d) Re-packing ePollbook solution when shipping back to warehouse
Election Day
Pollbook Pilot

Operational and Acceptance Procedures

• Create testing matrix for each functional role

  ➢ Define all aspects of the manual process
    (Trainers/Election Workers)

  a) Demonstrate how to check in a voter
  b) Demonstrate what to expect when certain
     conditions are met (ex. Inactive, ID required, etc…)
  c) Demonstrate how to handle these conditions
Operational and Acceptance Procedures

• Create testing matrix for each functional role

  ➢ Define all aspects of the manual process (Voter Services)

  a) Testing proper operations of set functions (ex. resetting voter check in, marking provisional voters, etc.)

  b) Testing proper operation of the Same Day Registration (SDR) service
Operational and Acceptance Procedures

• Create testing matrix for each functional role
  ➢ Define all aspects of the manual process (Technical Staff)
    a) Test converting device from EV to ED mode
    b) Test all functional features concerning election file imports and exports
Election Day
Pollbook Pilot

Operational and Acceptance Procedures

• Have each DCBOE group perform their acceptance testing and provide feedback
Election Day

Pollbook Pilot

ePollbook Vendor(s), Voter Registration System (VR), DCBOE Technical Configuration meeting

• Define what data needs to be exported/imported
• Define what data is needed to build elections on ePollbook
Election Day

Pollbook Pilot

ePollbook Vendor(s), Voter Registration System (VR), DCBOE Technical Configuration meeting

• Define how data (Active, Inactive, Absentee status, etc.) is displayed and handled on ePollbook
• Define and demonstrate SDR usage on ePollbook
Election Day

Pollbook Pilot

ePollbook Vendor(s), Voter Registration System (VR), DCBOE Technical Configuration meeting

- Review, test, and modify concerns detected in the SDR portion of the application (without any major coding being performed)
Pollbook Pilot

ePollbook Vendor(s), Voter Registration System (VR), DCBOE Technical Configuration meeting

• Review process of ePollBook’s handling of the daily exports of Voter History to our VR system
• Review process for uploads of the supplemental data to the ePollbook nightly
Election Day

Pollbook Pilot

Deployment and Logistics

- Perform a bandwidth and signaling survey of Early Voting Sites that will use WiFi/Cellular connectivity
Election Day

Pollbook Pilot

Deployment and Logistics

• Purchase, configure and deploy Cisco MR34 WiFi Routers at DCBOE HQ and warehouse (handling bandwidth and traffic)

• Configure and stage application to devices and election data using MDM technology (Cisco Meraki)
Election Day

Pollbook Pilot

Deployment and Logistics

• Assign devices to appropriate polling places and verify connectivity and location is accurate
• Lead Tech/warehouse staff review each ePollbook package for their appropriate destination and insert into delivery rotation
Election Day

Pollbook Pilot

Election Time (Early Voting & Election Day)

• Assign devices to their appropriate polling places and verify connectivity and location is accurate such that all assigned devices are communicating in their appropriate mode
• Verify that all components (printer, scanner, etc.) are functioning properly
Election Day

Pollbook Pilot

Election Time (Early Voting & Election Day)

• Verify the assignment and VR file count is correct
• Verify that each Lead Tech has a spare ePollbook solution available if needed
• Perform transition from EV to ED and verify that all supplementals have been uploaded and deployed to devices
Election Day

Pollbook Pilot

Final Data Extraction (April 28th)

• Export all Voter History and signatures from ePollbook
• Verify data exported with all vendors that participated for accuracy
• Verify data processing within the VR system
Final Review

- Create and send out a survey to obtain information, good or bad, concerning the ePollbook pilot
Final Review

- Consolidate all notes, feedback and concerns raised regarding the entire process for in-house discussion concerning next steps for your agency
Election Day

Pollbook Pilot

Final Review

• Schedule meeting with those vendor(s) that participated in the pilot to discuss the overall project and its successes and failures and how to address items that were detected as issues or concerns