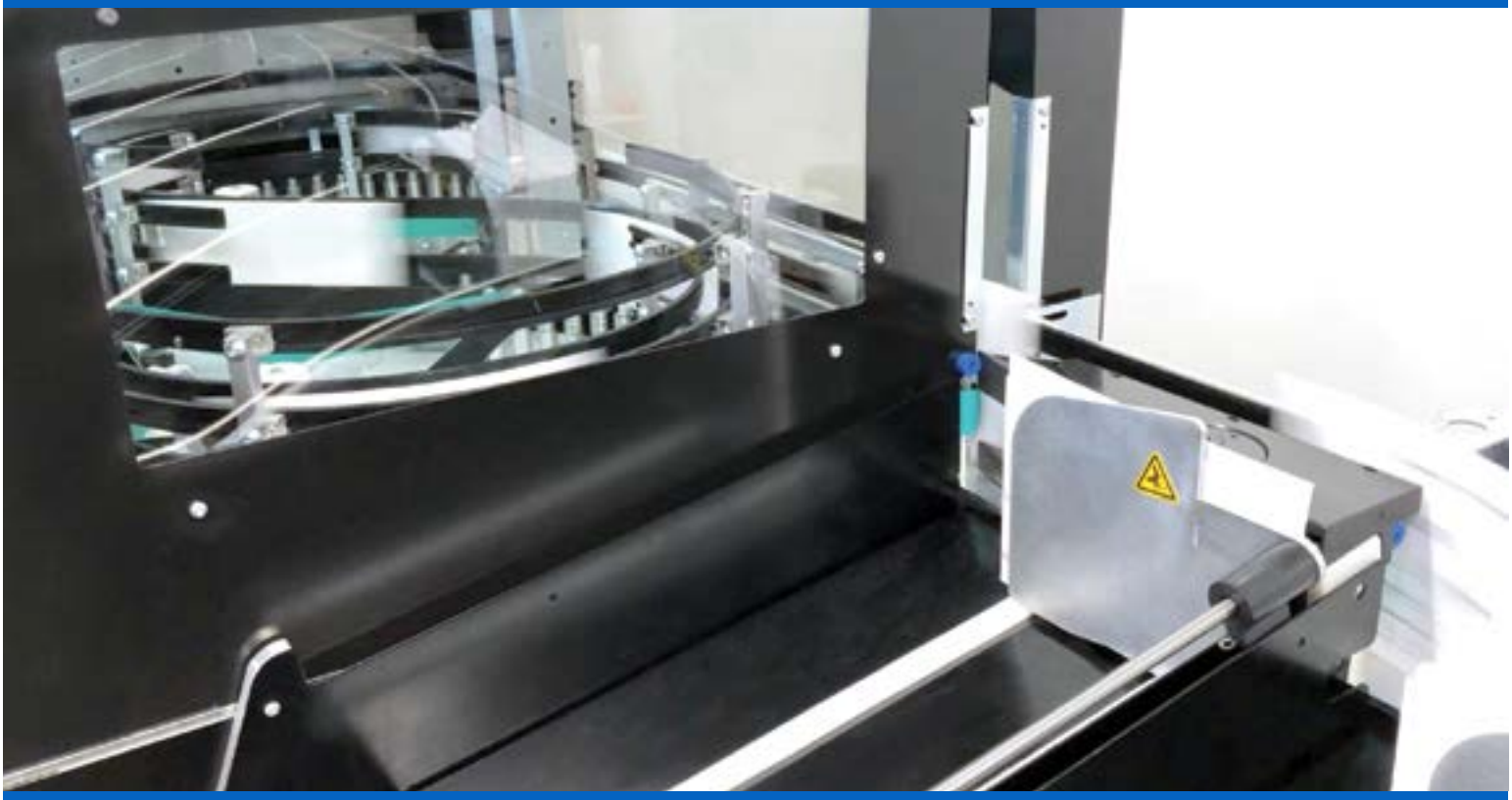
RUNBECK
ELECTION SERVICES Inc.

AGILIS® BALLOT PACKET SORTING SYSTEM

USER GUIDE



Runbeck Election Services
America's Election Partner

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Revision History

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OVERVIEW

Runbeck Election Services' Agilis® Ballot Packet Sorting System is a hi-tech sorting solution that makes vote-by-mail ballot packet processing quick, easy, and affordable. It adheres to USPS automation standards for mail-handling including thickness and rigidity requirements. The system scans and extracts signature images for fast verification processing with signatures on file.

Highlights:

- **Portable**: measuring only 60'W x 73"H x34"D without the Stackers, the Agilis fits in a limited working space and is built on wheels making it easy to move.
- **Scalable**: the Agilis can be customized to meet a jurisdiction's sorting needs.
- **High-capacity**: processes up to 18,000 pieces per hour—ideal for 50,000+ volume.
- **Capable**: the Agilis automates image capture, Signature Verification (SigVer) and sorting of ballot packets into valid and challenged categories.
- **Secure**: provides election officials the ability to sort their own mail ballot packets and verify voter signatures with complete accuracy and a full audit trail in their own secure facility.

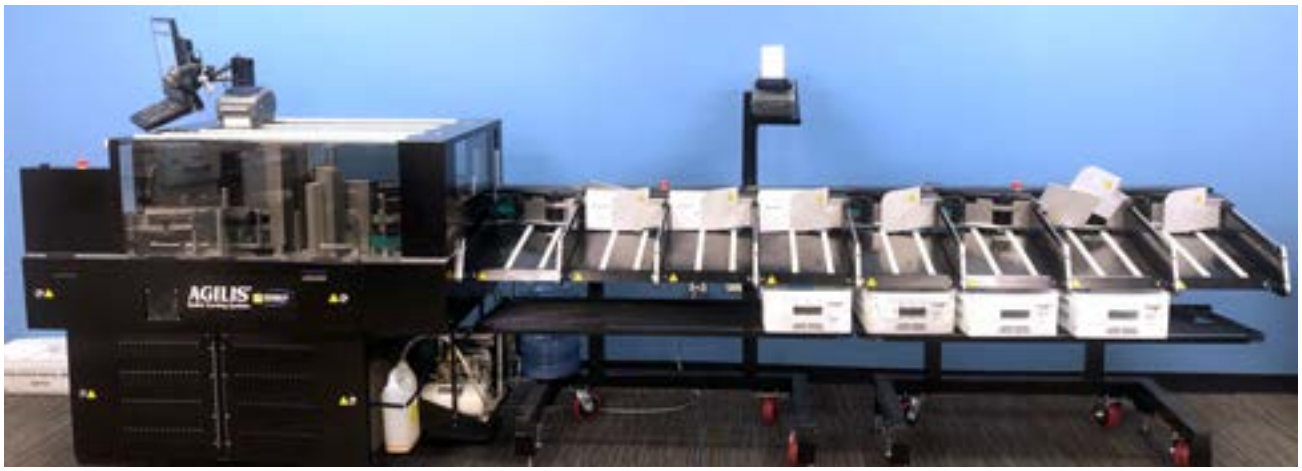
This User Guide describes Agilis' hardware and software components and instructs Users how to use the equipment to sort ballot packets for elections. It is divided into five sections:

1. **Equipment**: provides diagrams and descriptions of Agilis' hardware and software components.
2. **Election Setup**: describes how to set up Agilis' to process ballot packets for an election.
3. **Operation**: gives detailed instructions on how to run scan passes.
4. **Maintenance**: identifies recommended practices for regular maintenance of the Agilis.
5. **Troubleshooting and Support**:

CONTENTS

Part 1 :: EQUIPMENT

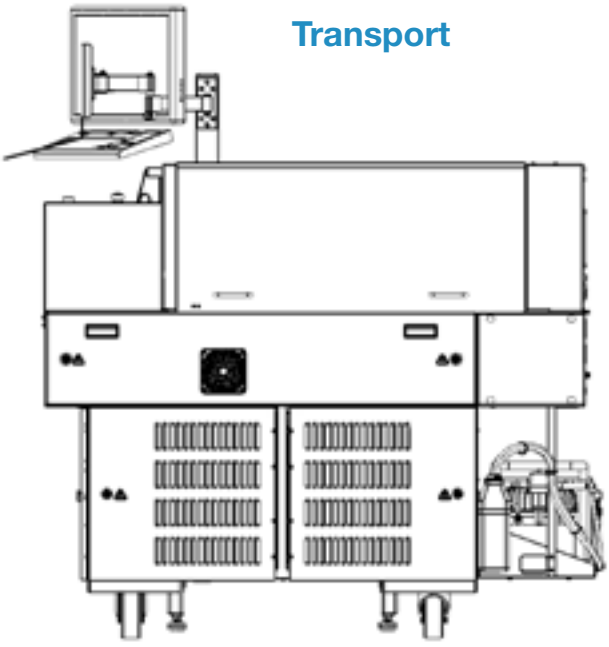
This section describes Agilis' hardware and software components that work together to process ballot packets. The hardware includes the **Transport** and the **Stacker**. They integrate with two software applications: the **Agilis Console** and the **Agilis Helm**. In this User Guide, the hardware equipment is detailed with numbered diagrams, part names and descriptions. The Console and Helm are described with screen visuals and basic functions.



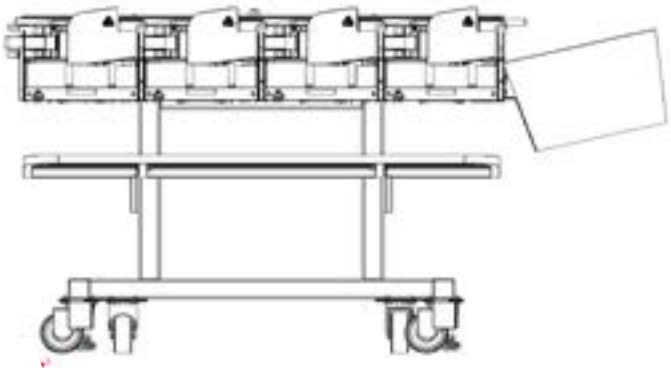
AGILIS HARDWARE

Agilis' hardware components are separated into two major pieces of equipment:

Transport

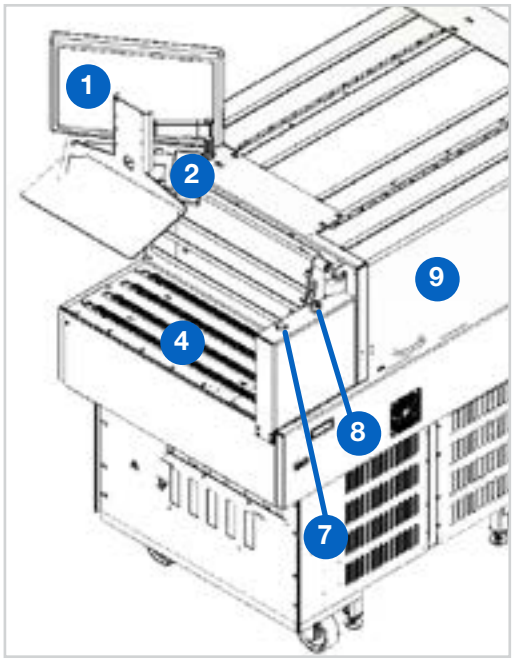


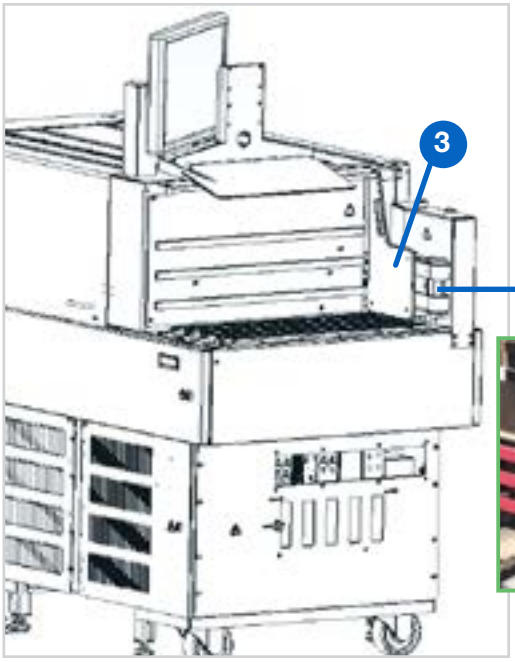
Stacker

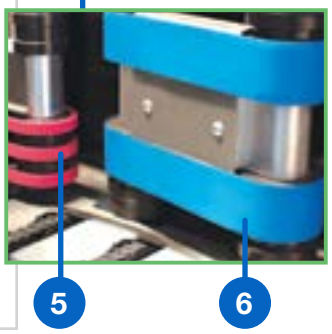


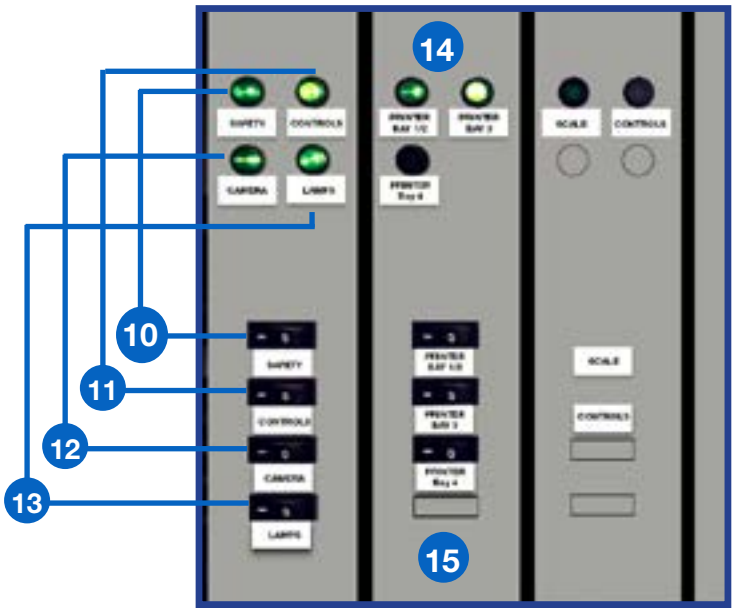
THE TRANSPORT

The **Transport** is the equipment that contains various belts that move ballot packets through the system, camera equipment and sensors. The software and equipment logically sort and prep the ballot packets to then enter the Stacker.







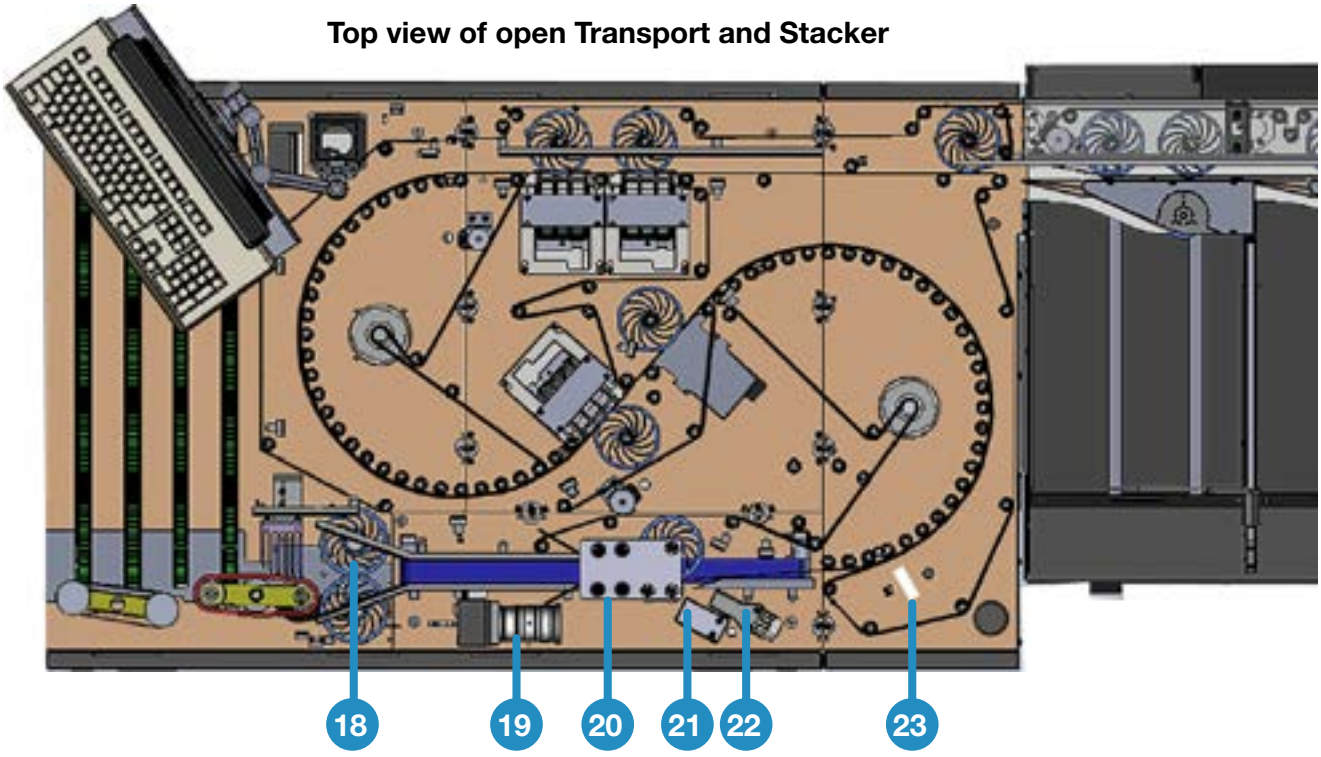


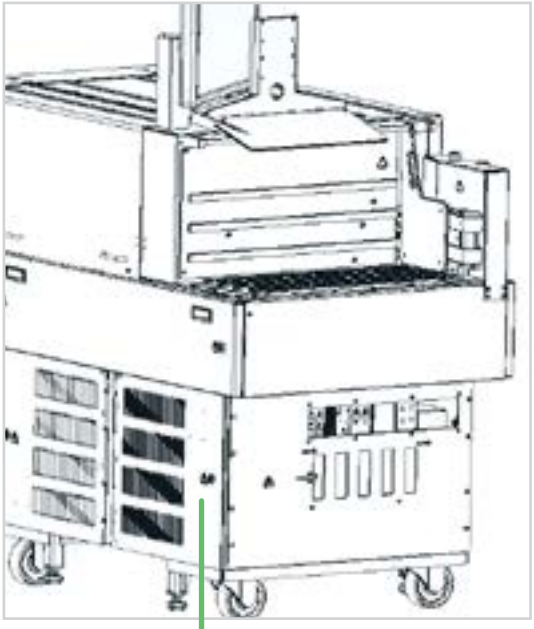
1. **Touchscreen Monitor**: screen gives Users access to the Agilis Helm and Console.
2. **Hand Scanner**: a hand-held scanner used to scan the information on a ballot packet one packet at a time. Scanning the ballot packet provides the latest information stored in Agilis' database based on VR import and/or scan pass data.
3. **Magazine Backing Plate**: metal plate located behind a stack of "faced" ballot packets on a groove within the magazine belt. It keeps packets pressed tightly against the belts so that packets can be fed into the machine.
4. **Magazine Belt**: grooved belt on the bottom part of the magazine which feeds packets to the Pre-Feed and Feeder Belts.
5. **Pre-Feed Belt**: belt sits at an angle from the magazine wall and is spring mounted to allow for flexing as ballot packets are placed. It moves the packets one at a time into the feeder belt.
6. **Feeder Belt**: belt moves the fed ballot packets from the Pre-Feed Belt to the Transport's internal belt system and to the OCR Camera.
7. **Reset Button**: blue button next to the E-Stop button that is used to reset the safety circuit after an e-stop has been depressed, or during power up.
8. **E-Stop**: (Emergency Stop) red button used to stop the Agilis. Use to safely clear ballot packets when they get jammed in the equipment.

   Important: Always stop the equipment before clearing a jam.
9. **Lexan Covers** clear covers on the left and right sides of the Transports that open up to provide access to the internal sorting equipment.

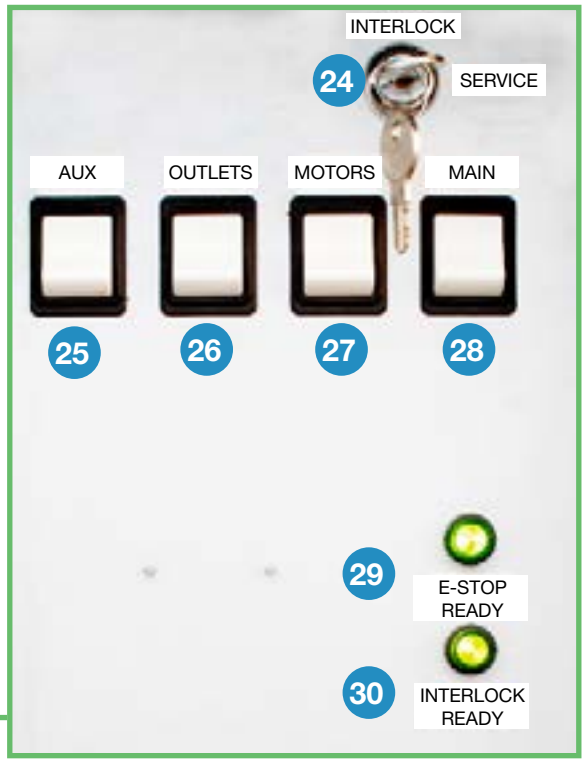
10. **Safety** (switch and light):
11. **Control** (switch and light):
12. **Camera** (switch and light):
13. **Lamps** (switch and light):
14. **Printer Bay Lights - 1/2, 3 and 4**
15. **Printer Bay Controls - 1/2, 3 and 4**
16. **Server**: Agilis database computer
17. **Workstation**: Agilis Helm and Console software computer

Top view of open Transport and Stacker



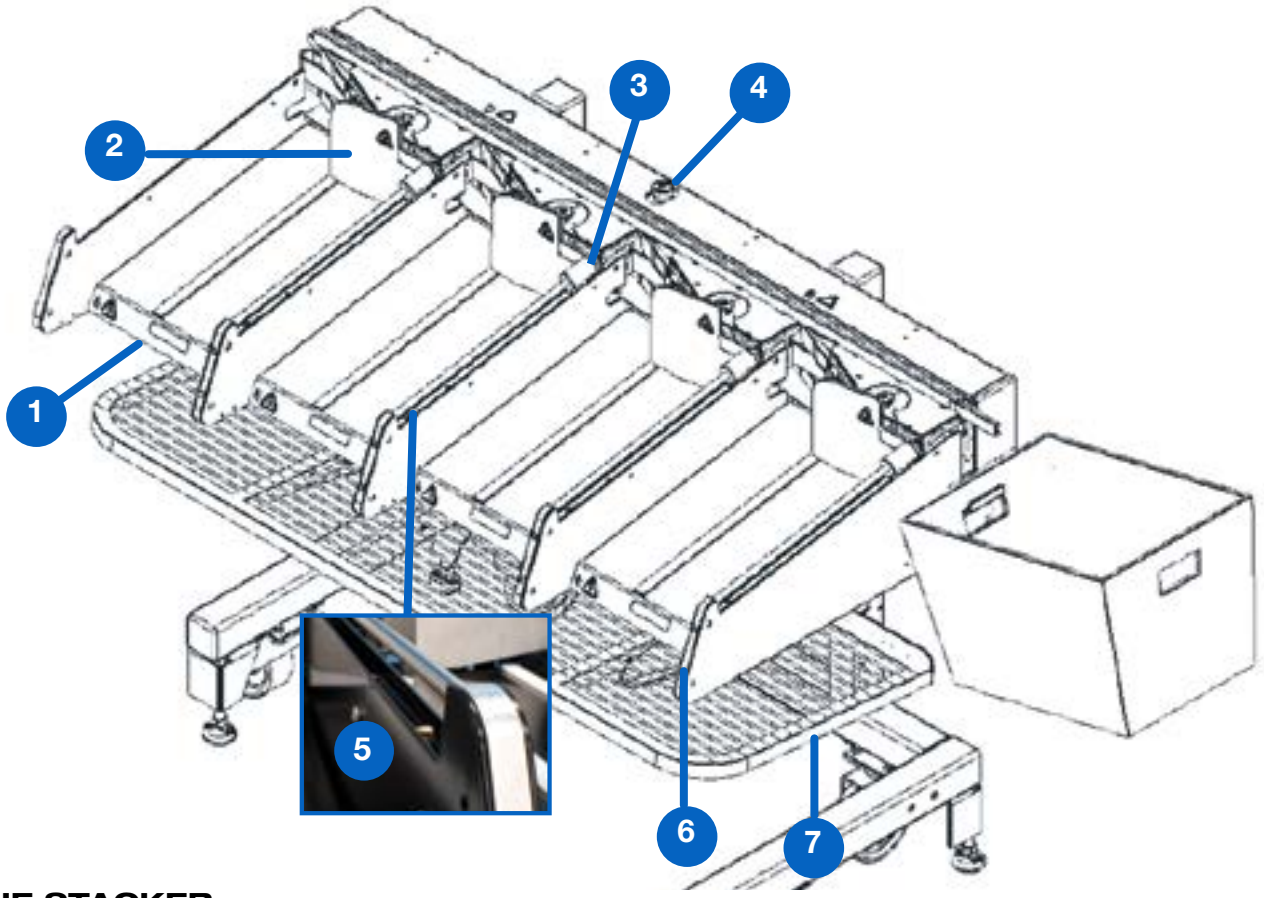


(Inside of cabinet)



18. **Pinch Rollers**: twin rollers that push ballot packets fed into the Transport by the Pre-Feed belt toward the camera platen area.
19. **OCR Camera**: the camera captures an image on a pass of information on the ballot packet.
20. **Camera Platen Area**: section in the Transport where ballot packets are placed for image capture by the camera.
21. **Mirror**: reflects an image of the ballot packet as it passes by the camera to capture an image of it.
22. **Lightline**: provides lighting of the ballot packet as it passes by the mirror so the camera can capture an image of it.
23. **Thickness Detection Laser**: measures the ballot packet as it passes to determine its thickness.

24. **Interlock/Service Key**: used by Field Services personnel to disable the safety interlock on the Transport's Lexan covers.
25. **Aux Switch**: provides power for all auxiliary components.
26. **Outlets Switch**: provides power for all auxiliary power outlets.
27. **Motors Switch**: provides power for all motor components of the Agilis.
28. **Main Switch**: main power supply which provides power to all switched-on components.
29. **E-Stop Ready**: this light indicates that no e-stop buttons are currently depressed.
30. **Interlock Ready**: this light indicates that no e-stops are depressed and all safeties are clear.



THE STACKER

The **Stacker** is the equipment that takes the sorting logic from the data collected in the Transport and physically sorts ballot packets to the appropriate pockets.

Each Stacker section consists of four pockets. One or more Stacker sections can be connected together to expand to the number of pockets. It has a tray tag printer to create tags for trays. The Stacker's onboard sensors detect when pockets are physically full and what pockets are clear.

1. **Pocket**: sectioned area for ballot packet sorting (four pockets per Stacker section).
2. **Stacker Backing Plate**: metal plate which pressures sorted ballot packets in pocket.
3. **Stacker Backing Plate Stopper**: prevents pocket from overfilling by: a) triggering the Pocket Full Switch and b) providing a barrier that physically prevents additional ballot packets from filling the pocket if the Pocket Full Switch fails.
4. **E-Stop**: (Emergency Stop) red button used to stop the Agilis. Use to safely clear ballot packets when they get jammed in the equipment. Each Stacker section has an E-Stop

   Important: Always stop the equipment before clearing a jam.
5. **Pocket Full Switch**: stops ballot packets from entering the corresponding pocket.
6. **Pocket Clear Button**: logically clears the pocket.
7. **Mail Tray Shelf**: holds mail trays with ballot packets.
   Note: tray tags should match mail tray tags.

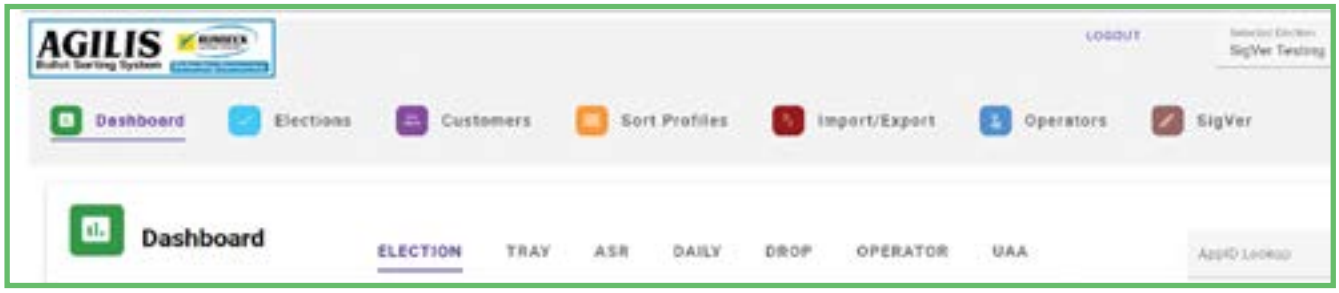
THE AGILIS CONSOLE

The Agilis Console is the software application where Users configure election parameters so ballot packets are sorted properly. The Console can be used to set up elections, scan passes, add and edit Users, conduct SigVer, import and export to VR databases, etc.

The Agilis Console can be accessed on the workstation's browser. (Chrome is recommended.) Access the Agilis console through the URL provided by Runbeck Field Services. On the **Login** screen, enter a **Username** and Password. The Console home screen displays the **Dashboard**.

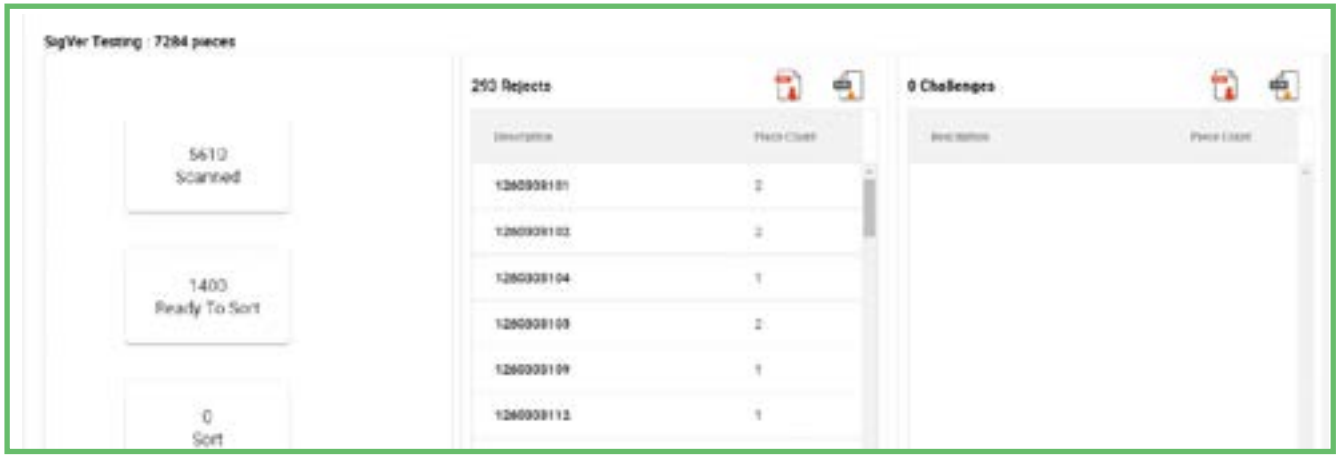
THE DASHBOARD

The **Dashboard** consists of seven tabs: **Election**, **Tray**, **ASR**, **Daily**, **Drop**, **Operator** and **UAA**.



ELECTION TAB

On the launch of the Console, the **Election** tab displays elements about the last scan pass.



On the top left the **SigVer Testing Counter** shows the number of pieces that are ready for SigVer.

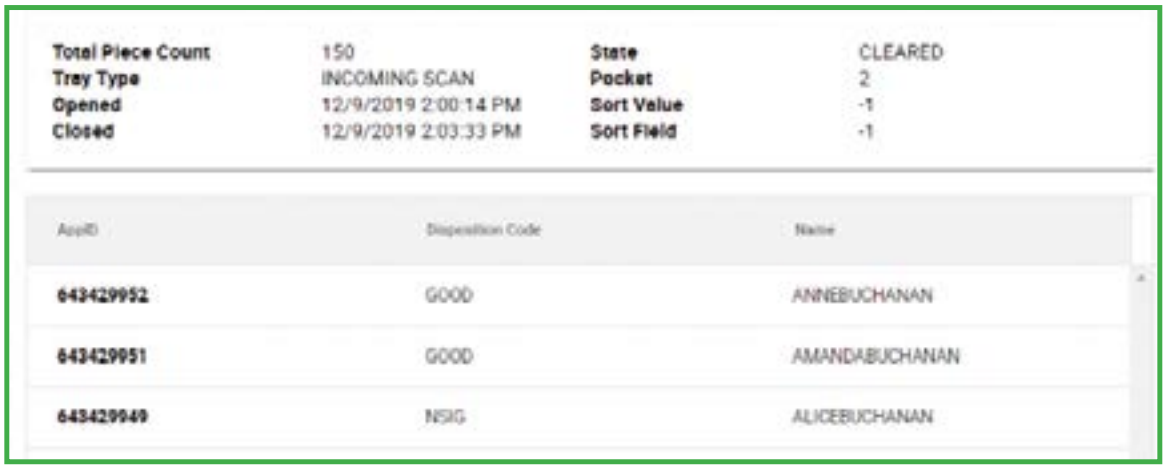
Exporting to PDF and XLSX

Data displayed on any screen that contains these buttons can be exported to PDF and XLSX files.

Scanned Button

The **Scanned** button displays the number of ballot packets that have been through an Incoming Scan Pass but do not have a disposition. As it is given a disposition through ASR or Signature Verification, the count will decrease.

Press on a Tray in the grid to display information about the items in that tray.



The reporting shows:

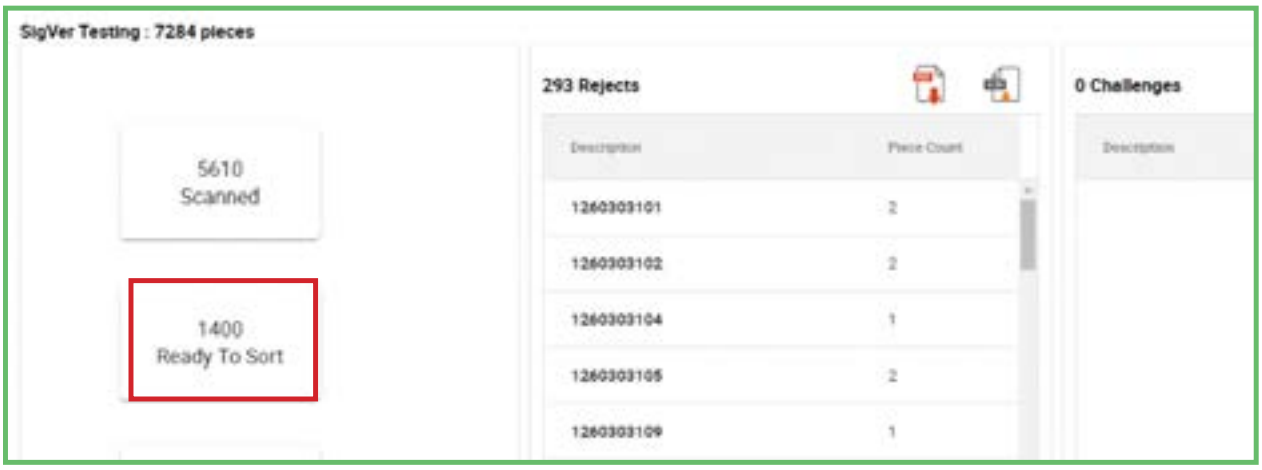
- ✔ **Total Piece Count**: the number of ballot packets in the selected tray
- ✔ **Tray Type**: the type of scan pass of the tray's ballot packets
- ✔ **Opened**: the date and time that the tray was opened for scanning
- ✔ **Closed**: the date and time the scanning closed
- ✔ **State**: the current processing status of the selected tray
- ✔ **Pocket**: the number of the pocket for selected sorted ballot packets
- ✔ **Refresh Data**: updates the latest data from the database for items in the tray

Below reporting, a grid displays the individual ballot packets that are part of the tray. Click a line item on the grid to review information collected for the ballot packet on the **Piece Report**.

Ready to Sort Button

The **Ready to Sort** button displays the **Ready to Sort Trays** report.

Once ballot packets have completed the incoming pass scan, first and second SigVer and are ready for the Audit pass. The **Ready to Sort Trays Report** shows trays that contain ballot packets which have been assigned dispositions. Users can audit this report to drill down to trays and individual ballot packets to view details.



Sort button

The **Sort** button provides a total for the number of pieces that have been run through an Incoming Sort Pass.

Finalized button

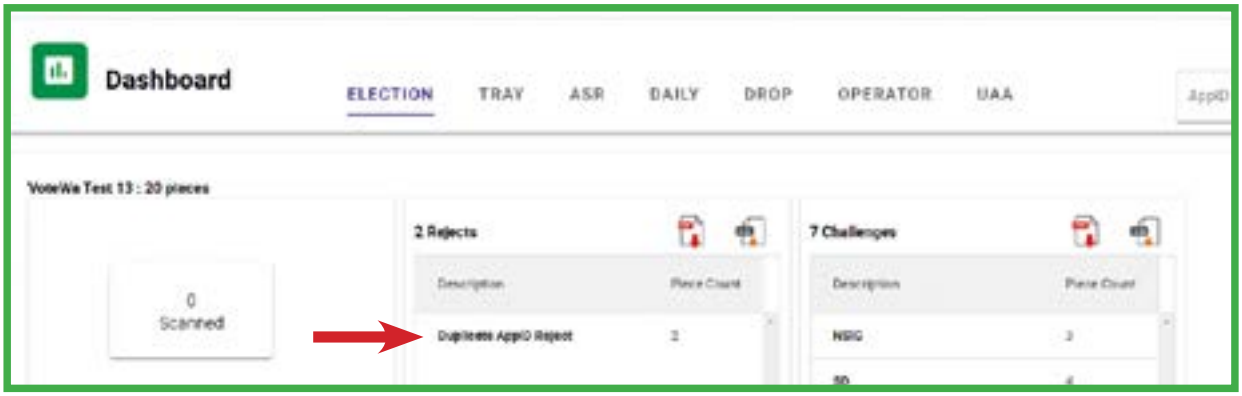
The **Finalized** button displays a report of finalized ballot packets. This is a report of ballot packets that have been accepted as "GOOD" in an Audit pass. Trays and ballot packets that are aggregated to this grid have come from a "Ready to Sort" status.

Users can inspect this report to drill down to trays and individual ballot packets to view details.

Rejects Grid

On the center of the Election tab, a grid of reports provide information on good and rejected ballot packets. The counter at the top-left of the grid displays the total number of rejected ballot packets.

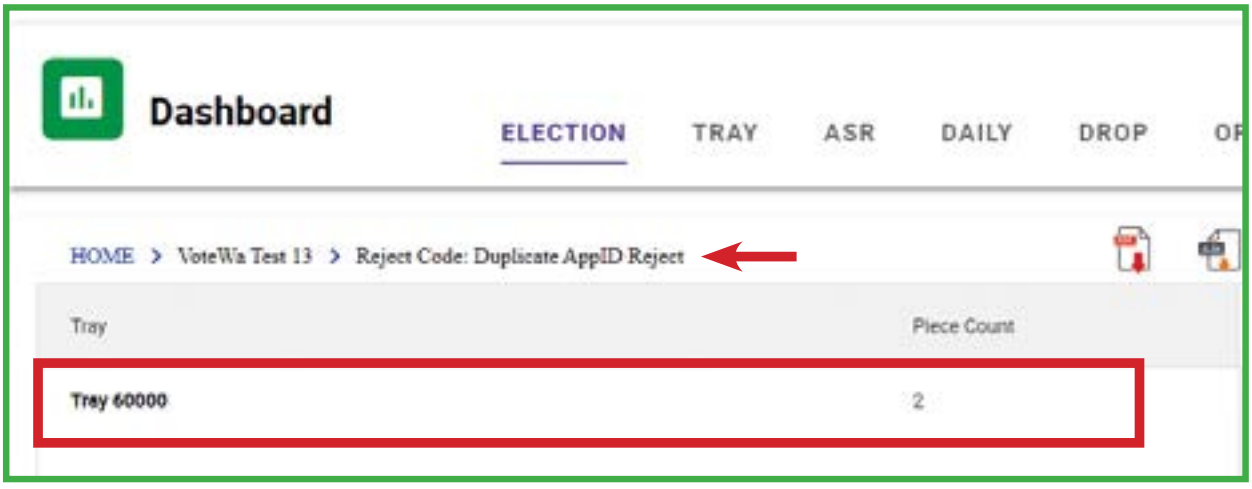
The grid displays the name (description) of the rejection reason and the Piece Count (number of ballot packets). The sum of the Piece Count of each report is shown in the rejection count.



Each rejection reason represents a report (*see the Rejection Reasons Diagram for more information on Rejection Reasons*). Click on the rejection reason's name to display each individual report.

Rejection Reason Reports

When a rejection reason is pressed on the **Rejects** grid, the that report displays the tray(s) that contained ballot packets rejected for that reason.



REJECTION REASONS

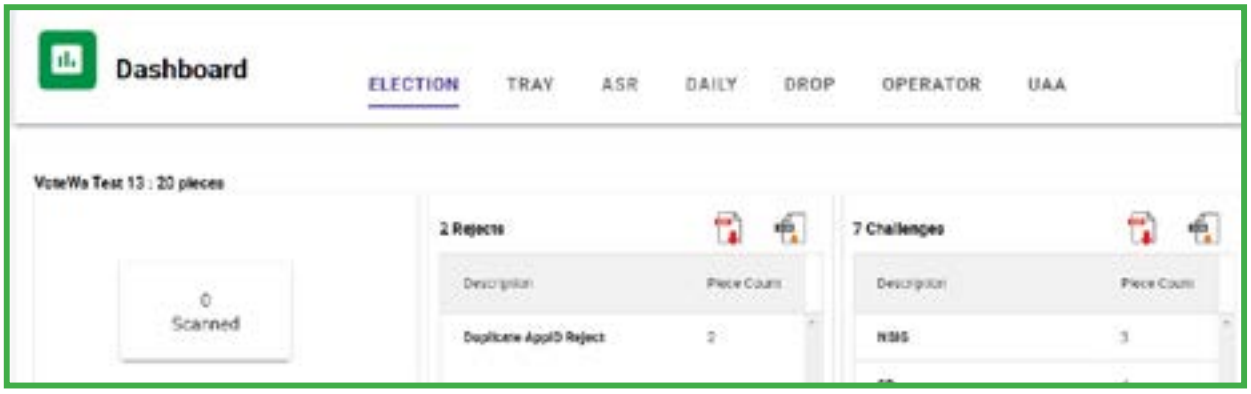
Problem	Reason	Resolution
Already Audited	Ballot packet rejected because the AppID has already been put into a "GOOD" tray during an Audit Pass.	Search for the ballot packet and put it in the last designated tray. It was previously sorted on an Audit tray.
Dimensions Reject	Envelope measurements do not match those entered on the Elections setup tab in the Console.	The dimensions check is used to out-sort envelopes that are not the correct length and/or height.
Double Reject	Different than thickness, a near-exact double size packet was detected.	Look for ballot packets sticking together by fanning them. Rescan or rerun.
Duplicate AppID Reject	The AppID was previously scanned into a "GOOD" pocket during an Incoming Scan Pass.	Find the ballot packet on the report to see when it was last scanned. Take appropriate steps to process.
Invalid AppID Reject	a) There is an issue with the barcode on the ballot packet b) The AppID doesn't exist in the database.	a) Print a new label for ballot packet and rescan. b) Re-run the ballot packet after the next ballot import.
Missing AppID	a) May be white mail b) The ballot is faced backwards c) The lens cap is on the lens	a) Print a label for ballot packet if needed b) Face the ballot correctly and rescan c) Take the lens cap off the camera
No Disposition	No disposition was assigned to the ballot packet during SigVer.	Check the SigVer 1st Review tab to see if there are ballot packets left to be verified.
No Signature	Signature not detected during the incoming scan pass.	Turn signature detection off and rescan the ballot packet.
Out of Profile Reject	Ballot packet has status not assigned to any pocket of current pass.	Look up the AppID for the ballot packet. It should be run on another profile.
Outsort	Ballot packet manually marked for out-sort by an election judge.	The ballot packet should be identified, segregated and returned to the election judges for review.
Overflow	Ballot packets already in the mail path when their designated pocket filled.	Rescan or rerun the ballot packets before closing pockets. It could also be an envelope with a tracking error.

REJECTION REASONS		
Problem	**Reason**	**Resolution**
Rescan Reject	Ballot packet the system identifies to be run with Rescan turned on.	Turn on Rescan and run the ballot packet again.
Scan Reject	Ballot packet that is currently part of an Audit or Sort pass but hasn't been run through an Incoming Scan Pass.	Start processing of this ballot packet again. Add it to the next Incoming Scan Pass. Determine if there a missing ballot packet with a similar AppID.
Thick Reject	Ballot packet is too thick.	Turn off the thick/thin detection option and rerun using Rescan mode.
Thin Reject	Ballot packet is too thin.	Turn off the thick/thin detection option and rerun using Rescan mode.
Upside Down Reject	Ballot packet was faced upside-down when run through a pass.	Run the ballot packet again with correct orientation using Rescan mode.
Wrong Election	Ballot packet pertains to a different election.	Follow the jurisdiction's procedure for handling of this type of ballot packet.
Piece Lost Rejection	Occurs when there is a timing issue during a pass.	The Piece Lost, Answered Late Reject and Sorter Timeout rejection reasons can be used interchangeably. They relate to sensor, encoder and tracking issues at various stages. These ballot packets should be processed on the pass they belong to: ■ Incoming scan: ballot piece must be Rescanned before closing pockets. ■ Incoming Sort: ballot must be Run on the same Sort Profile before closing pockets. ■ Incoming Audit: look up the ballot packets. Identify the assigned tray and place the packet in that tray for the benefit of the reports.
Answered Late Reject		
Sorter Timeout	Occurs when there is a timing issue during a pass or there is an issue with the camera.	
Catch All	Default rejection status providing logic to place all ballot packets in a particular pocket.	DOES NOT include Out of Profile and Overflow pockets. If these ballot packets go in the same pocket, check all three in the profile for a given pocket.

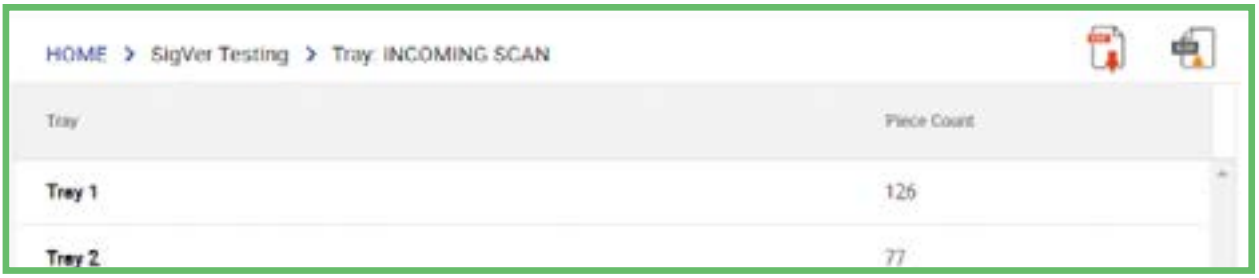
Challenges Grid

The **Challenges** Grid displays a list of reports with information on challenged ballot packets. The counter at the top left displays the total number of challenged ballot packets during SigVer.

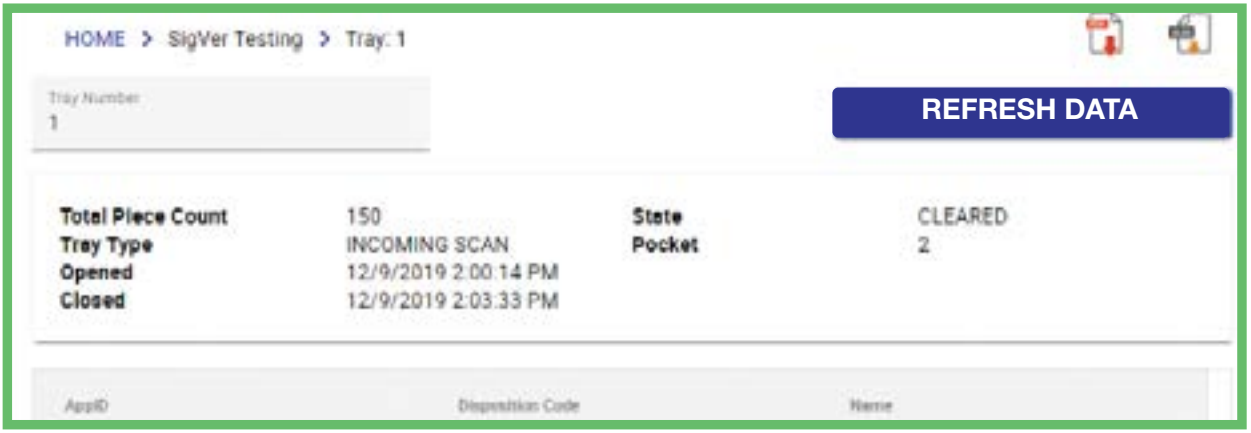
Under Description the grid displays the reason the ballot packet was challenged and the Piece Count of ballot packets. The Piece Count of each of the reports added together totals the amount displayed in the Challenges piece count.



Since the report's name depends on challenge reason designations setup by the jurisdictions, the reports names vary. Click on the report's name to display each individual report.

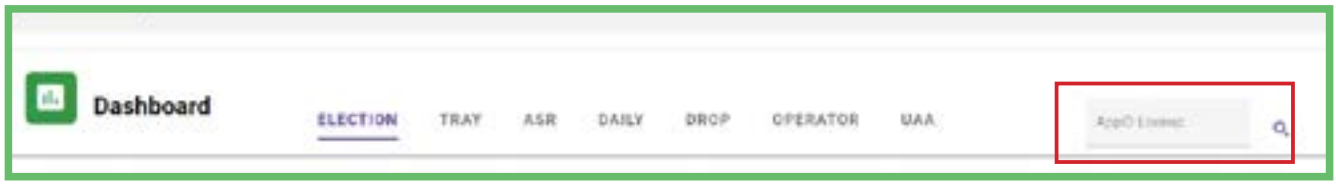


The report displays summary information such as **Total Piece Count** and **Tray type** and a grid displaying each **AppID**, its **Disposition Code** and the **Name** of the voter.



Searching for Ballot Packets by AppID

Searching for ballot packets can be done any time after an import of VR data is completed using the **AppID Lookup** tool found on the top right corner of the **Dashboard**. A search displays the latest information gathered on the ballot packet based on import and/or scan pass data.



1. Select the **AppID Lookup** field
2. Type an AppID into the field
3. Press Enter or scan the barcode on the ballot packet using the Hand Scanner.

The Dashboard displays the latest information collected by Agilis for the searched ballot piece on the **Piece Report**.

Piece Report

The **Piece Report** provides the latest information on an individual ballot packet based on VR import and scan pass data.

The report provides the following data:

- **AppID**: the individual identifying number corresponding to the ballot packet
- **First Name**: the voter's first name
- **Last Name**: the voter's last name
- **Voter ID**: the voter's individual identifying number on the VR database
- **District**: the voter's election jurisdiction
- **Pocket**: the pocket where the ballot packet was sorted

- **Tray**: assigned tray number from closed pocket.
- **Sequence**: the position of the ballot packet within the tray.
  Note: A negative sequence number means that the AppID for the ballot packet exists in the VR imported data but the packet has not been scanned.
- **Disposition**: represents the challenge code that has been applied to a ballot packet. The value will either be "GOOD" or another code type as determined by the jurisdiction.
- **Custom 1–4 fields**: custom fields designed to provide jurisdiction-requested data. If one or more of the custom fields do not have specific jurisdiction logic assigned to them, or if the system doesn't return any data for the logic assigned to the custom field, the field(s) in question will be blank.
- **View Ballot packet**: this link opens a separate dialogue window with a scanned image of the front of the ballot packet.

Below the ballot packet information, the History Log displays the latest activity performed on the ballot piece. The three buttons shown:

1. **Mark as Good**: sets the ballot packet's disposition status to "GOOD".
2. **Mark as Outsort**: a very useful tool that outsorts a ballot packet during any pass. It overrides any other codes and outsorts the ballot packet until the **Remove Outsort** option is selected and the ballot packet will be sorted based on its Disposition code.
3. **Reset to Never Scanned**: use this to start the scanning process on a ballot packet over again. The packet must be run through an Incoming Scan Pass.

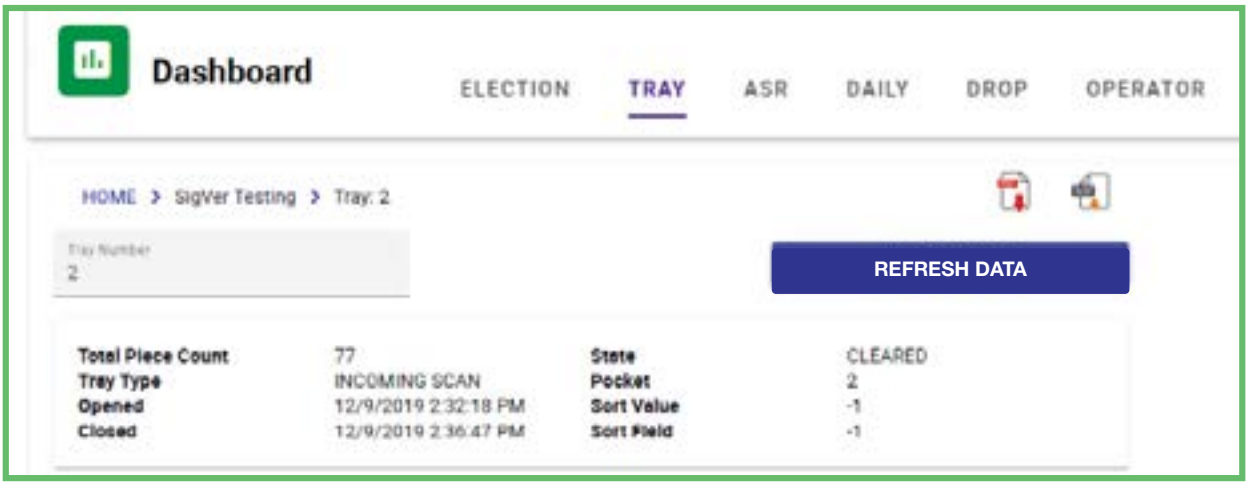
To the right of the buttons, the **Update Challenge Status** with the **New Challenge Code** drop-down lets Users change the Disposition of a ballot packet at any time.

The **New Challenge Code** drop-down displays a list of available challenge codes. Select a challenge code. Press **Update Challenge Status** to change the disposition of the ballot packet.

Note: Once the Disposition of the ballot packet is changed, it is important to run the ballot packet through another pass so it displays in the correct tray type and reporting is updated.

TRAY TAB

The **Tray** tab allows Users to audit individual trays. Enter a **Tray Number** and click **Refresh Data**.



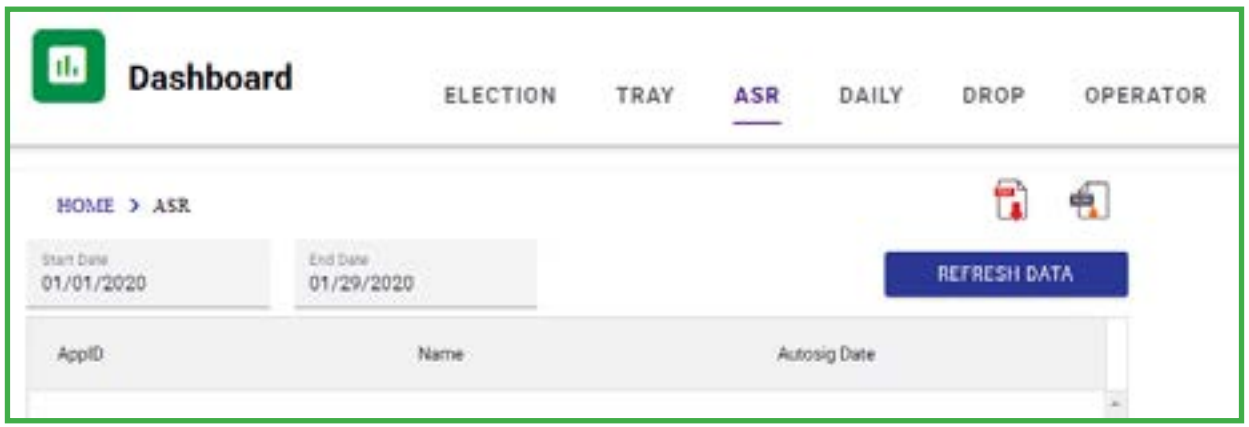
Information on the tray includes:

- ✔ **Total Piece Count**: the number of ballot packets contained in the selected tray.
- ✔ **Tray Type**: the type of scan pass for the selected tray's ballot packets.
- ✔ **Opened**: the date and time that the tray was opened for scanning.
- ✔ **Closed**: the date and time scanning for the selected tray was closed.
- ✔ **State**: the current processing status of the selected tray.
- ✔ **Pocket**: the pocket number containing the sorted tray's ballot packets.

Below the report, a grid displays the individual ballot pieces that are part of the tray. Click a line item on the grid to review information collected for the ballot packet on the **Piece Report**.

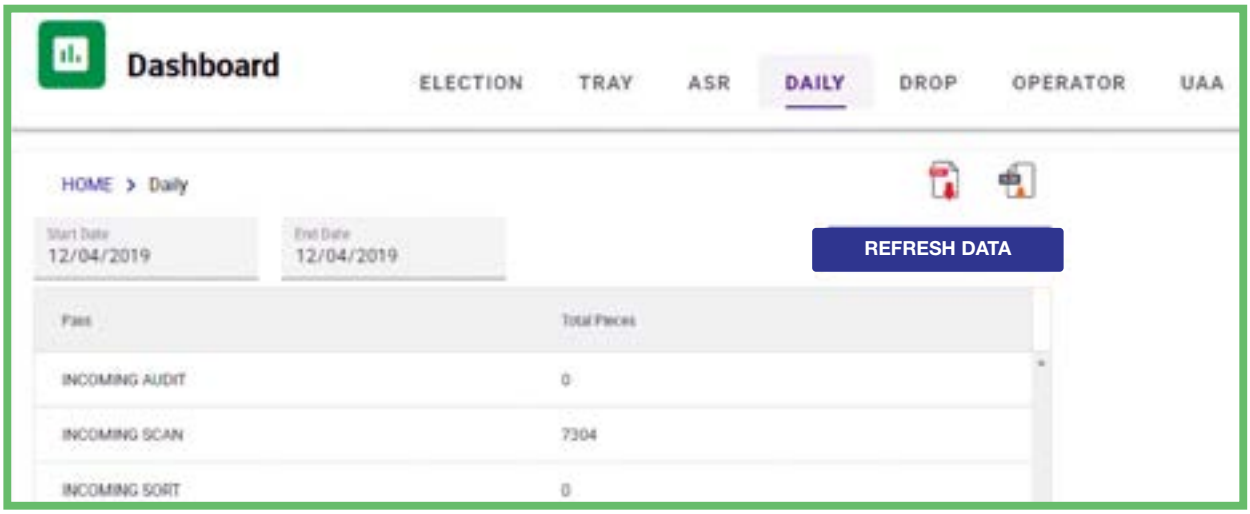
ASR TAB

The Automatic Signature Review **ASR** tab contains a report that shows the number of ballot packets reviewed by the ASR software run. It displays percentages based on the total number reviewed vs. number marked as "GOOD".



DAILY TAB

The **Daily** tab provides metrics on the day's activity for Agilis. Select a **Start Date**, **End Date** and click **Refresh Data**. The report lists each **Pass** and the total number of **Pieces** processed during the scan for the date range.



DROP TAB

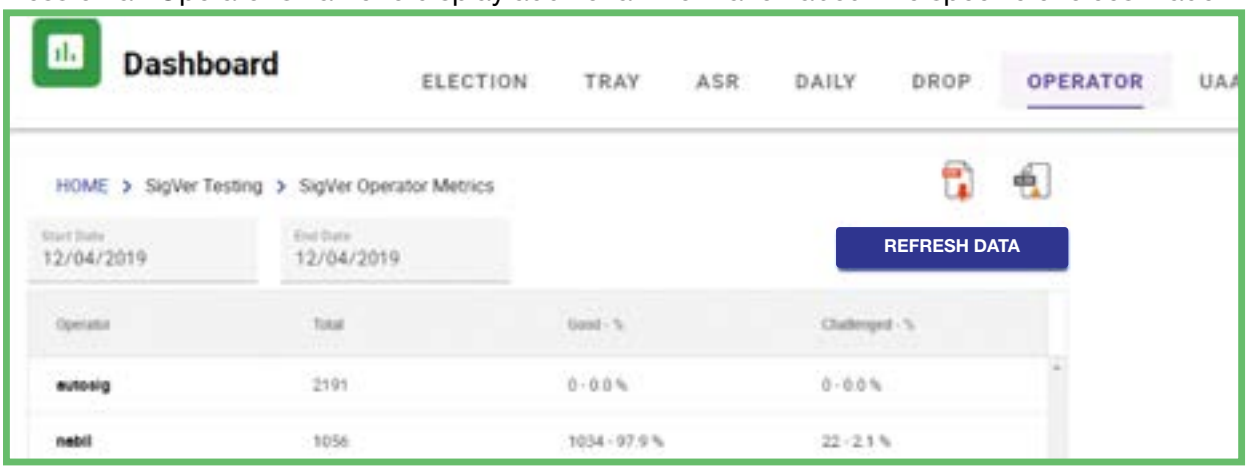
The **Drop** tab displays metrics on drop off location activity. Select a **Start Date**, **End Date** and click **Refresh Data**. The report lists each **Drop Off Location** and the total number of **Pieces** processed for that location on the date range.

OPERATOR TAB

The **Operator** tab provides statistical reporting on Disposition choices made by Operators during SigVer.

Select a **Start Date**, **End Date** and click **Refresh Data**. The report lists each **Operato**r, the **Total** number of pieces and the percentage of **Good** and **Challenged** pieces they processed.

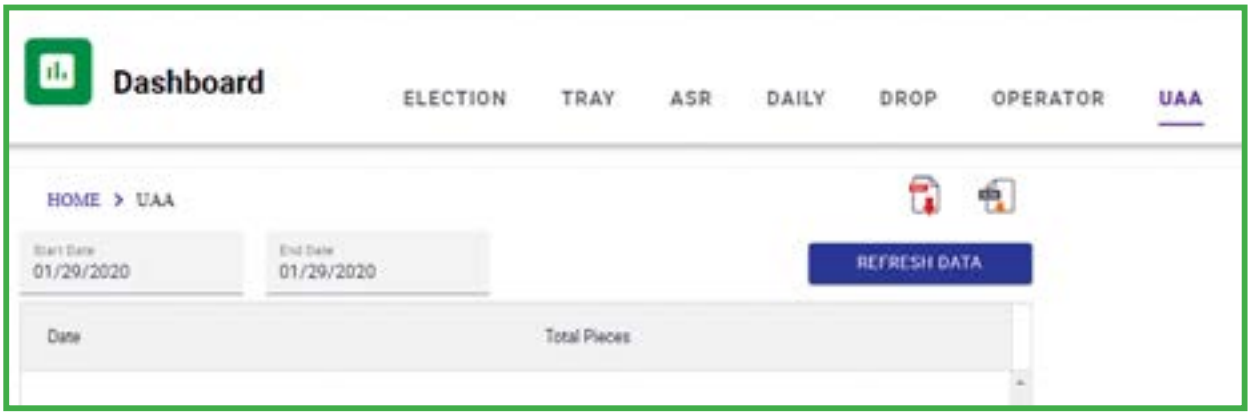
Press on an Operator's name to display additional information about the specific choices made



by the Operator during SigVer. The Operator's decisions can be reviewed on the Ref-Sorter image link which displays the images that election judges were shown during SigVer.

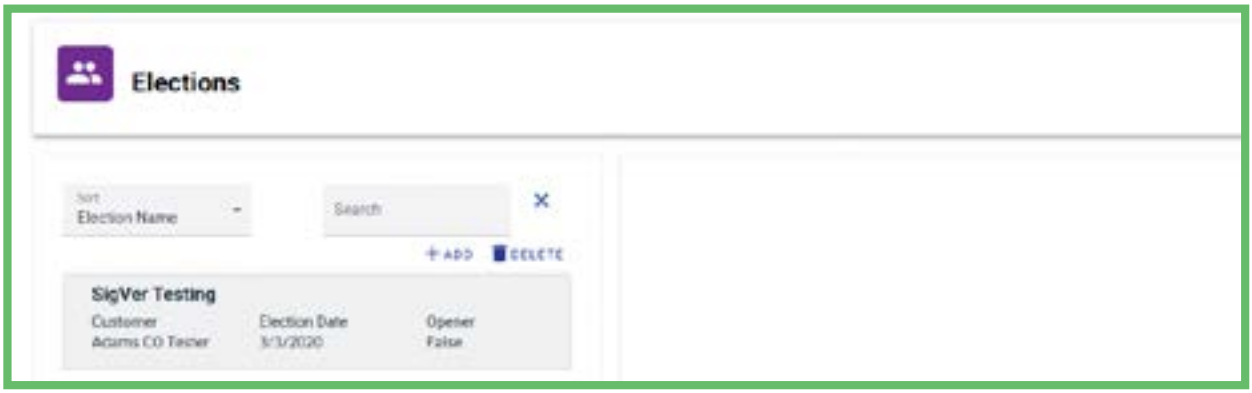
UAA TAB

"UAA" is a Postal Service term which stands for "Undeliverable As Addressed". The **UAA** tab displays a report showing how many ballot packets ran through on a UAA pass. The UAA feature does not add information to the other Election Data collected for the ballot packet.



ELECTION SCREEN

The **Election** screen is where a jurisdiction's elections are set up and edited. The screen displays any elections that match the criteria on the **Sort** dropdown by default.

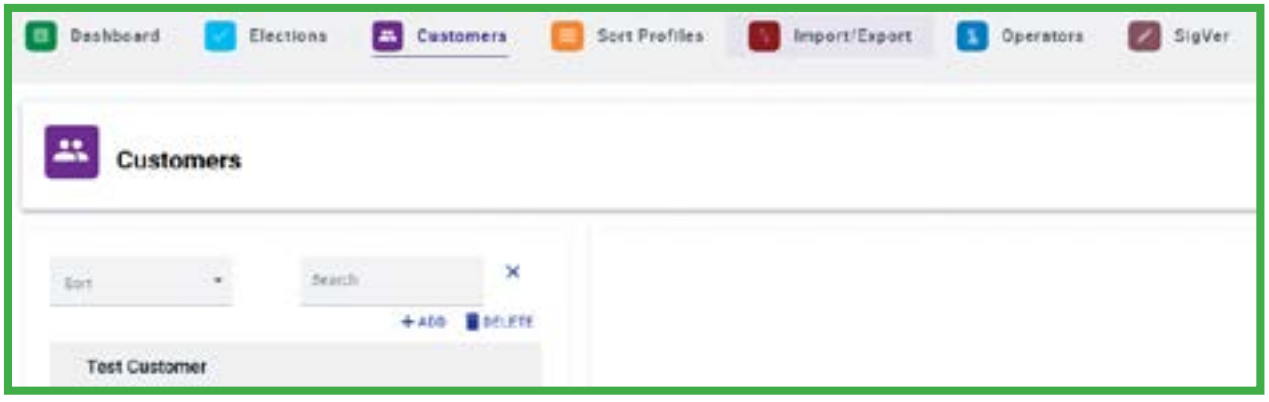


When an election is clicked, the right side of the screen displays five tabs with the main elements necessary to process ballot packets:

- ✔ **General**: fields to set/edit the **Election Name**, **Election Date** and **Customer** information.
- ✔ **Challenges**: location to Add, Edit, Delete and set the order of challenge codes.
- ✔ **Envelope**: sets the dimensions of the ballot packets.
- ✔ **Signature**: contains fields to set the cropped image capture location for ballot packets.
- ✔ **Mail Sources**: optional feature that provides functionality to set up ballot packet pick-up locations for reporting purposes.

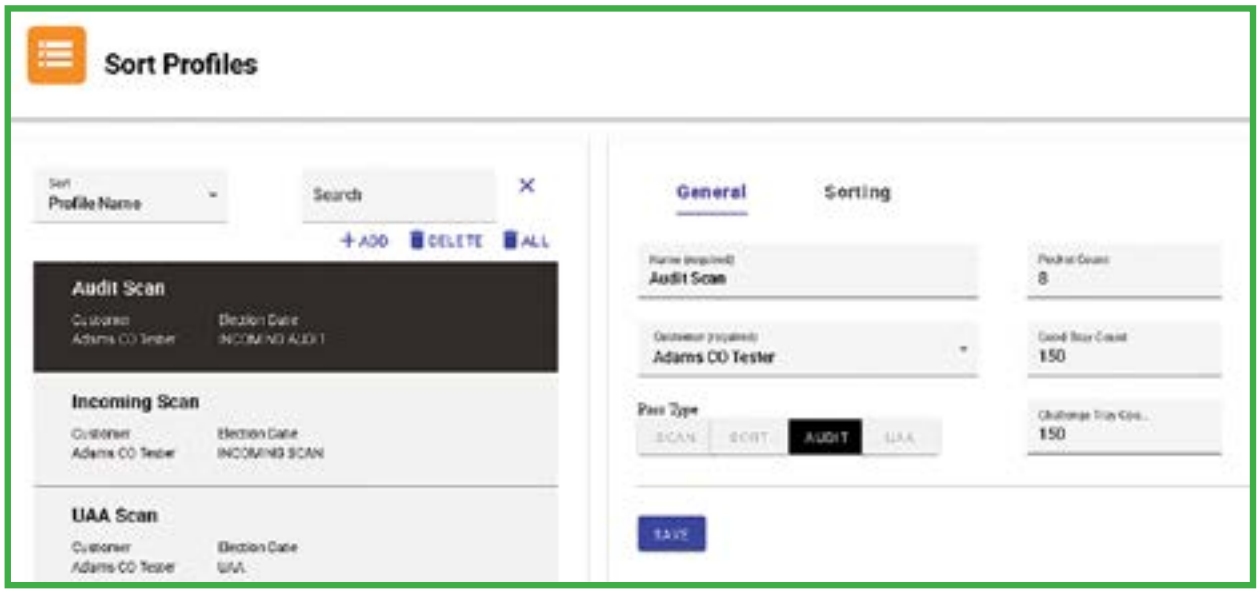
CUSTOMERS SCREEN

Agilis can be configured to process ballot packets for multiple elections at the same time. For example, larger jurisdictions such as a state or county can process ballot packets for an external jurisdiction such as a city—concurrently but separate from the Primary. The external jurisdiction would be a "customer" of the Primary jurisdiction. This is set up on the **Customers** screen. Press Customers to access the screen. Previous Customers grid are displayed by default.



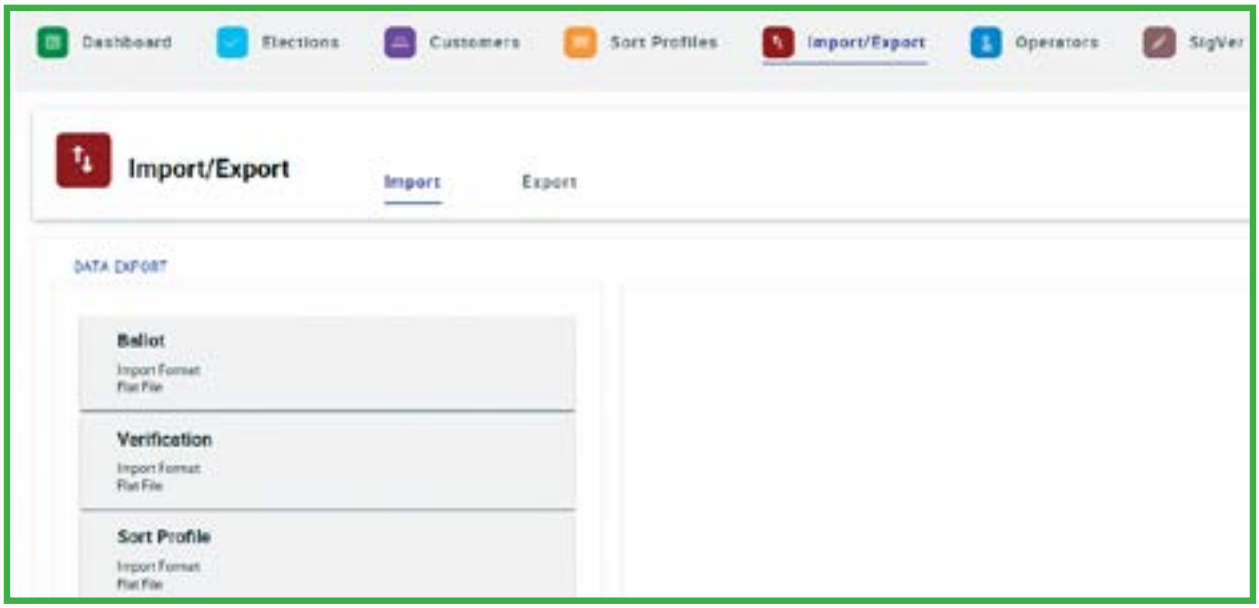
SORT PROFILES SCREEN

The **Sort Profiles** screen is where Users configure the specifics of the scan passes—or how the ballot packets will be sorted during the pass. Rules for sorting packets and for pocket designation is added.



IMPORT/EXPORT

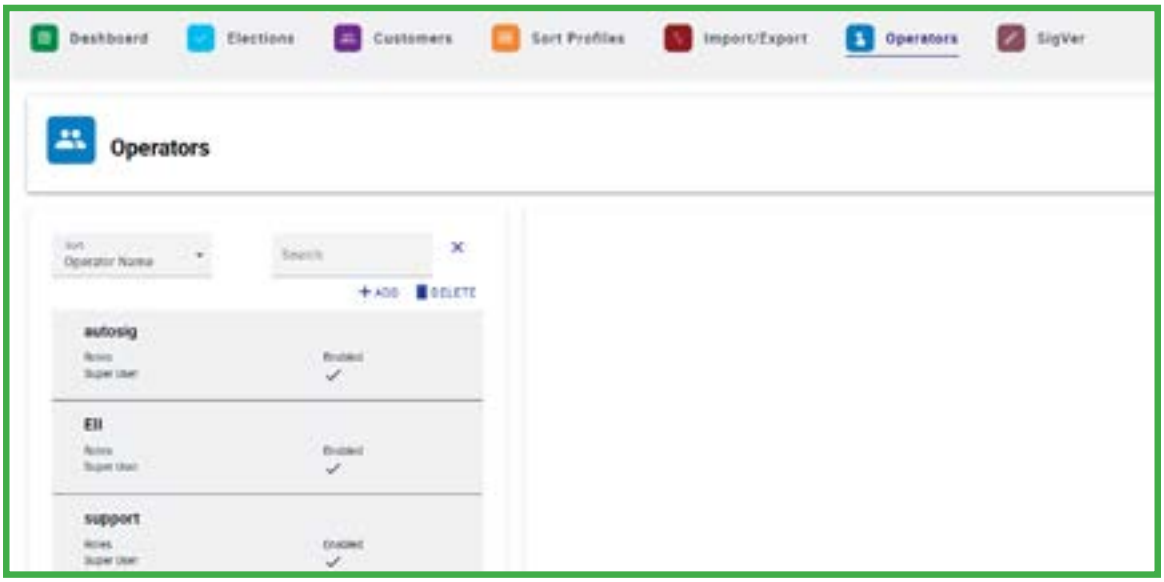
The **Import/Export** screen displays various imports and exports available for review based on the jurisdiction's configuration.



Depending on the jurisdiction, the Import and Export process in most cases is done using a text (.txt) file. However, the ability to connect Import and Export functionality through a direct connection to the VR system is available. Contact Runbeck Field Services to discuss the best option for the jurisdiction.

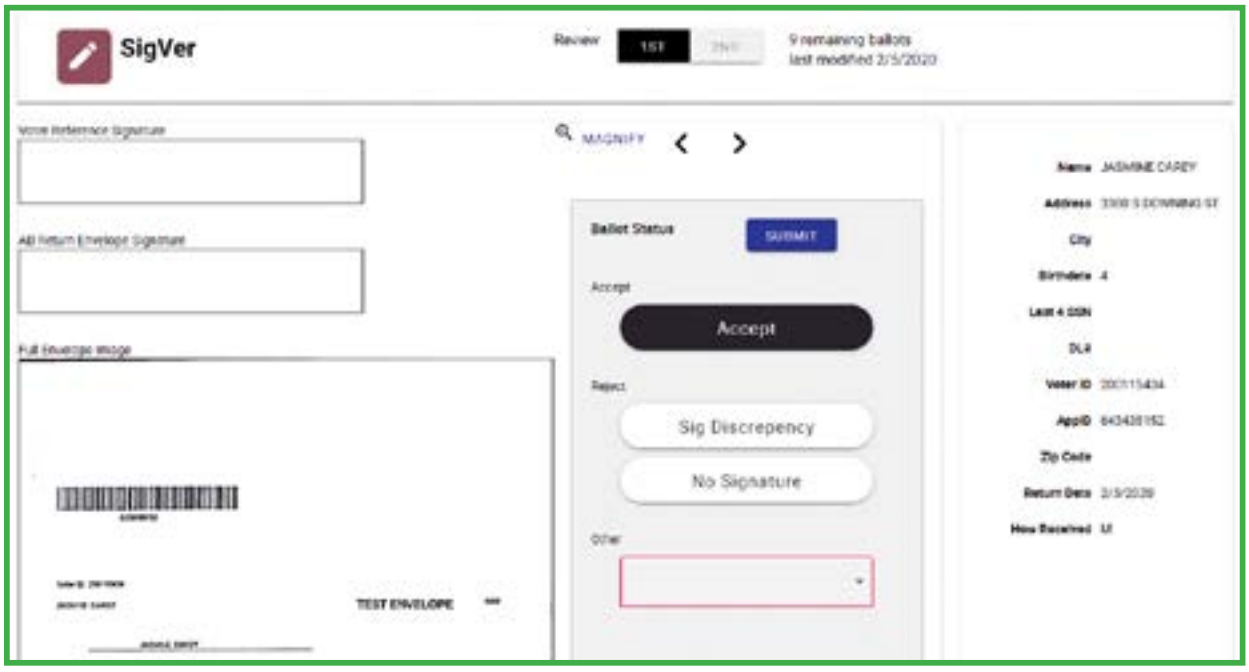
OPERATORS

Operators are elections officials that have been set up to use Agilis through the Console. The setup is done on the Operators Screen. The previously entered Operators are listed. Additional Operators can be added, edited or deleted.



SIGVER

The **SigVer** screen is Agilis' native Signature Verification Client. Users can audit signatures on ballot packets and assign dispositions to them. Second review of previous SigVer is done on this screen. Multiple computers can be connected to Agilis via the jurisdiction's network to provide SigVer access to as many elections officials as the jurisdiction needs. *See* **Conducting SigVer** *section for more information*.

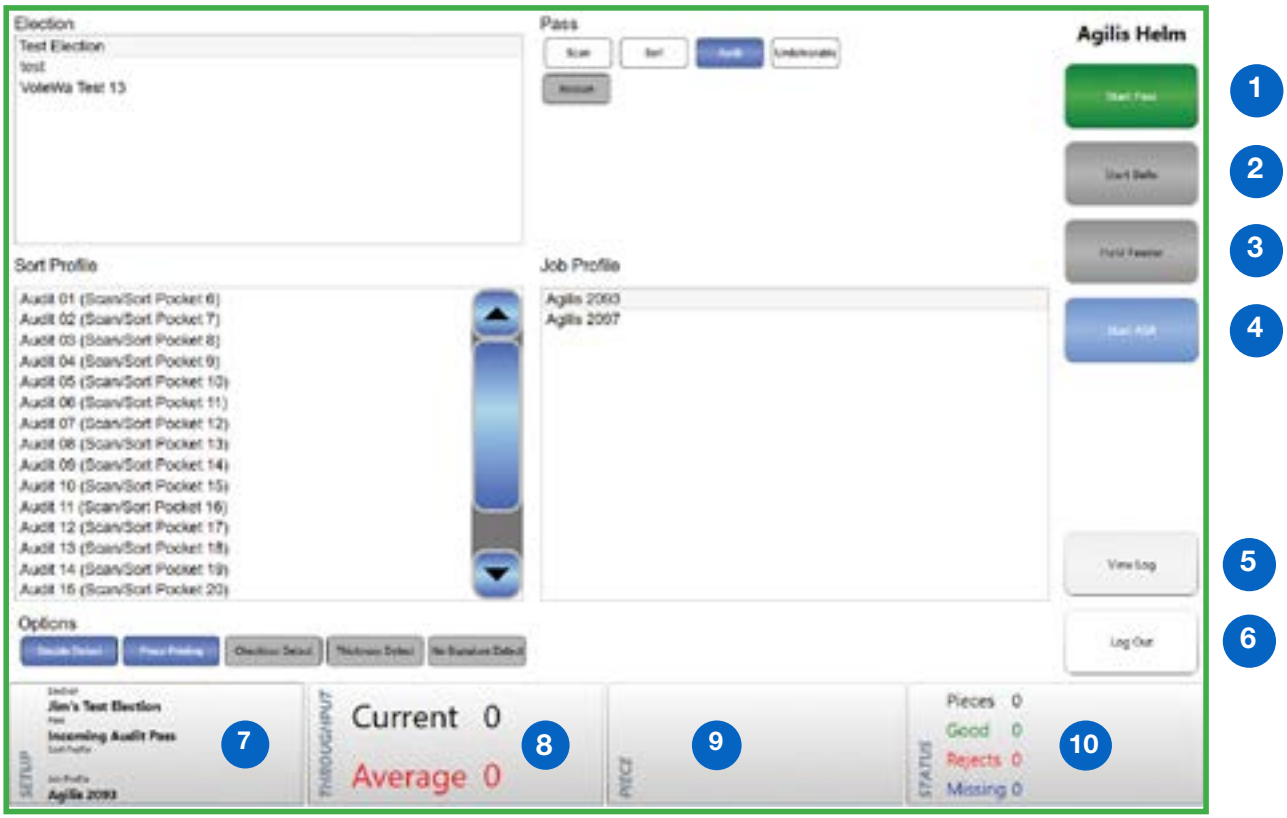


THE HELM

The Helm is the software that controls Agilis' sorting mechanisms. Users can choose scan passes by specifying election, sorting profile and job profile information, and then run scan passes. As Agilis scans ballot packets, it collects information on throughput, piece and status information. This is reviewed on the **Pieces** screen or by using the log. Many of the buttons found on the Helm toggle on and off and display the status of the button.

COMMON AREAS

The following screen elements are common to all screens in the Helm:



SORTER CONTROL BUTTONS STACK

1. **Start Pass/Stop Pass**: dynamic button to start a pass—available once the Pass, Election and Sort Profile are selected. (Changes status when pressed/depressed.)

2. **Start Belts/Stop Belts**: dynamic button to start and stop belts. A pass must be started before this button will operate.

3. **Release Feeder/Hold Feeder**: dynamic button to start and stop the feed magazine. A pass must be started before this button will operate. If belts are running, it will either display in green as "Release Feeder" or in red as "Hold Feeder".

4. **Start ASR**: applies to jurisdictions that have purchased the ASR (Auto Signature Recognition). Once an incoming scan pass has been closed, the ASR processes to verify every ballot possible. When finished, the SigVer process can be conducted.

5. **View Log**: displays system logs. Logs assist Runbeck Field Services in diagnosing issues by providing system performance information.

6. **Log Out**: closes the application.

STATUS DISPLAY BUTTONS

7. **Setup**: displays setup information for the election selected on the **Election** section. It also displays the **Setup** screen where passes are configured.

8. **Throughput**: when a pass is running, displays Current and Average number information for the pass.

   - **Current:** the number of packets that would be processed at the current processing rate if nothing else changes. For example, if a User presses **Hold Feeder** this metric would drop to zero.

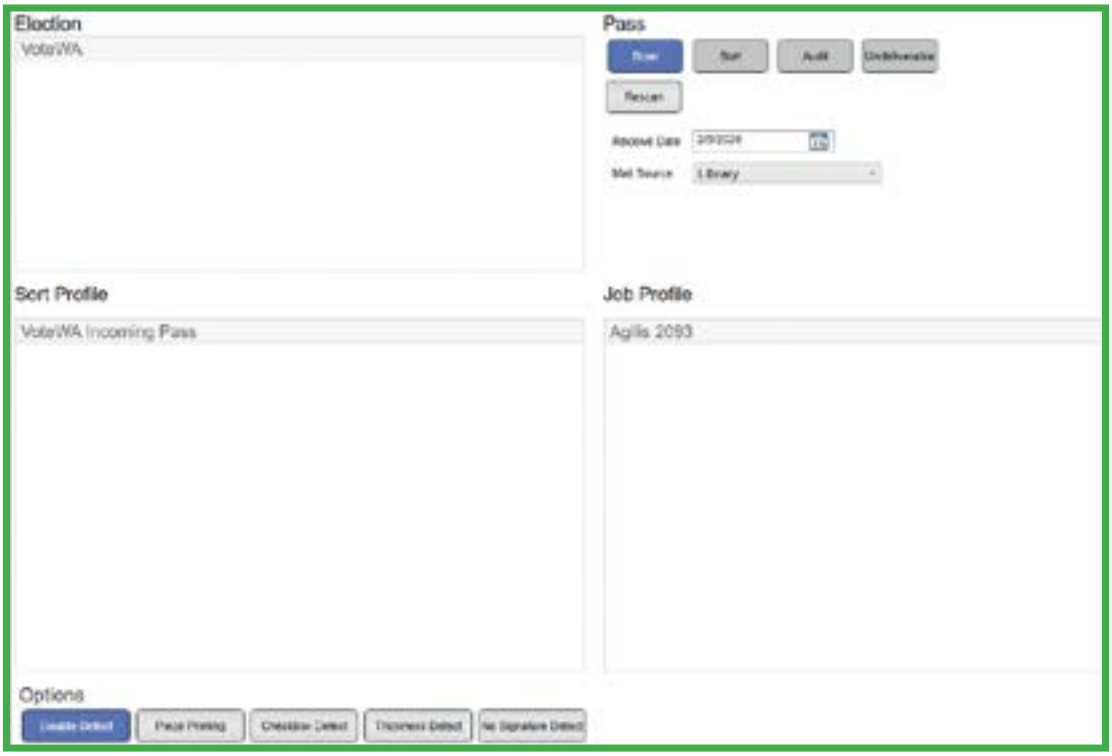
   - **Average**: the total average rate of packets processed since the pass started.

9. **Piece**: displays with individual ballot packet information and minor diagnostic functionality (*see the* **Piece Screen** *section for more information*).

10. **Status:** displays real time information about the packets that Agilis is currently processing (*see the* **Status Screen** *section for more information*).

SETUP SCREEN

The **Setup** screen is where passes are run. Users select the type of **Pass** to be run, pick a **Sort Profile** and **Job Profile** and select **Options** to add to the pass. Agilis will then use the logic built into that type of pass to sort ballot packets when the belts are running.



PIECE SCREEN

The **Piece** screen displays metrics and a magnified image of ballot packets as captured. Every packet's AppID is displayed while it is being processed. To review a specific ballot packet, press its AppID. The packet will be briefly displayed so Operators can audit pieces as the pass is being run. The screen has the following elements:

1. **Piece Viewer**: when pressed during a pass, an image of the ballot packet displays for review.
2. **Piece Counter:** displays the number of ballot packets that have been run. It does not differentiate between packets by barcode or any other element, so it functions as a straight count of packets run.
3. **Agilis Piece section**: displays a grid of ballot packet information such as Dimensions, Camera/OCR and Misc.

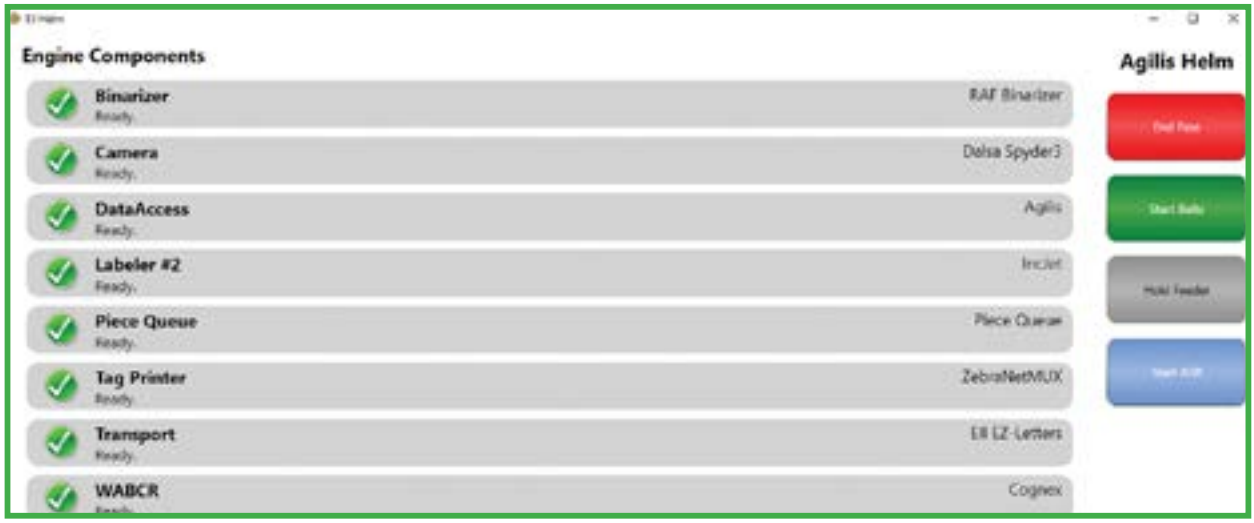
ENGINE COMPONENTS SCREEN

The **Engine Components** screen is a diagnostic tool which displays when a **Start Pass** is pressed. It shows the readiness status of the seven engine components necessary for proper operation of the Agilis. The components include:

- Binarizer
- Camera
- Data Access
- Place Queue
- Tag Printer
- Transport
- WABCR

The Helm assesses each component and provides feedback on its readiness in approximately 30 seconds. The readiness statuses are:

1. A checkmark displays when all components are ready.
2. An "X" icon displays if the Helm was unable to connect or start the component.

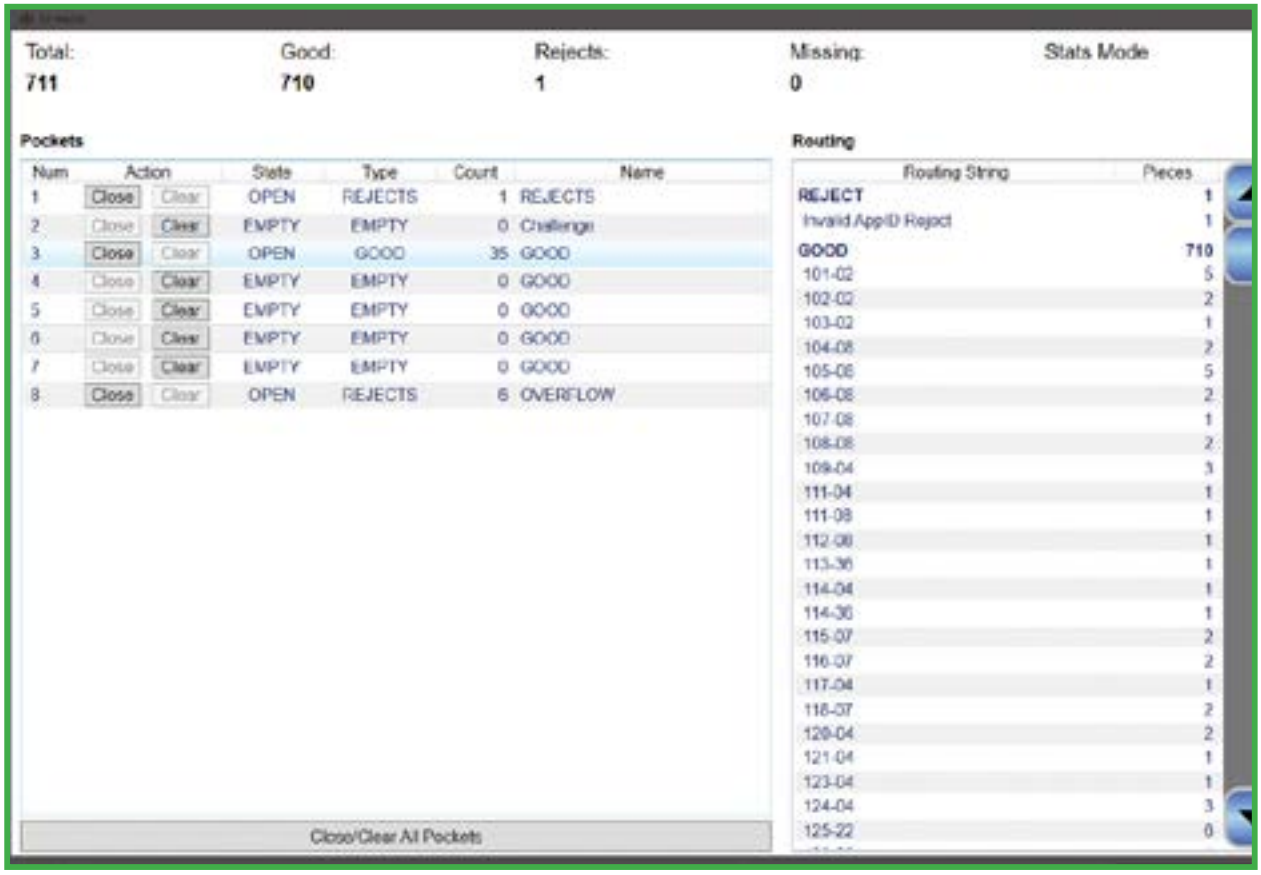


STATUS SCREEN

The **Status** screens gives Users a real-time view of the activity occurring at the pocket-level and the routing that is occurring while a Pass is taking place.

On the left, the **Pockets** section displays the pockets that have been configured to work on the Agilis, their current state, the type of pocket that it is, the number of ballot packets that are currently sorted to that pocket. It also provides functionality to close and clear the pockets.

On the right, the **Routing** section displays the total number of ballot packets in each status type and detail on the packets.



Part 2 :: ELECTION SETUP

BEFORE ELECTION SETUP

At the time of delivery, Runbeck Field Services physically set up and configure the equipment to operate properly. They also provide training on how to use Agilis to process ballot packets. As a complement to the training Users receive, Part 2 of the User Guide steps through the process of setting up an election.

PREPARING TO SET UP THE ELECTION

Part of preparing for the election is to create a setup plan. Field Services staff will work with each jurisdiction to determine such things as election parameters, what sort profiles will be used and which Operators require setup.

POWERING UP THE AGILIS

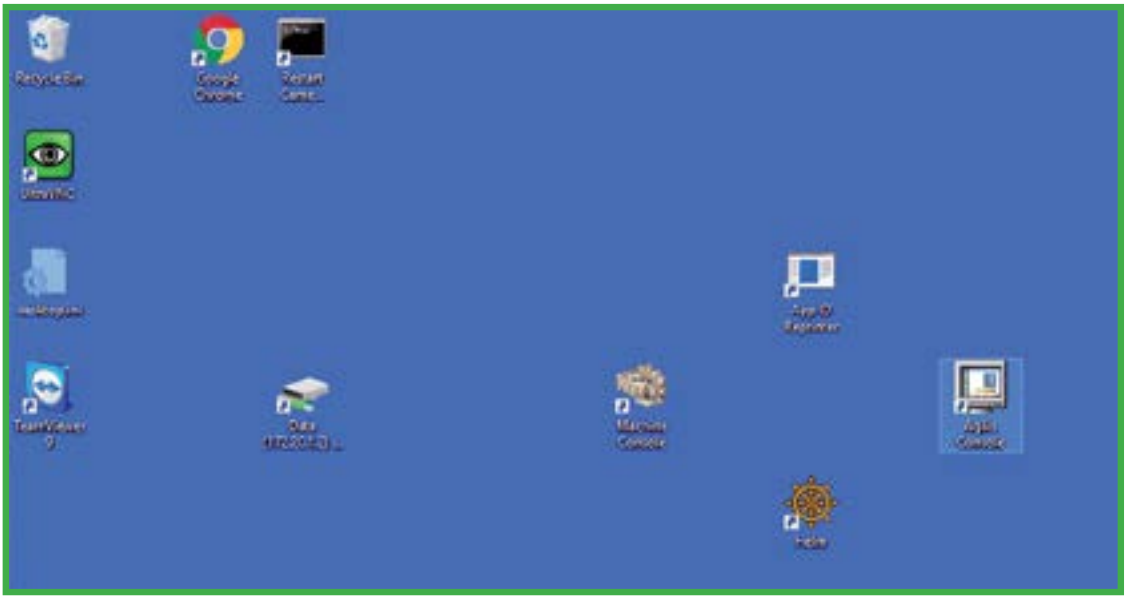
Typically when Field Services sets up the Agilis, it will be powered up. If this is not done or the equipment has been powered-down and stored, it's important to power up the Agilis appropriately.

1. Ensure that all Lexan covers are shut.
2. Unlock and open the lower-right cabinet on the back of the Transport using the key provided when the Agilis was delivered.
3. Verify that the Universal Power Supply (UPS) unit is on. It should always be on, but check that it is not turned off.
4. Flip the four white switches labeled **Main**, **Outlets**, **Motors** and **Aux** to the "On" position.
5. Make sure the green **E-Stop** and **Interlock** indicator lights below the four white switches are lit.
   - If the lights are off, press the blue Reset button on the transport.
   - If the lights are still not on, check if an E-Stop button is depressed. Release any E-Stops and press the blue Reset button again.
6. Make sure that all switches under the magazine are set to the "On" position.
7. Turn on the "Server" computer in the lower cabinet closest to the pockets right of the feeder mechanism.
8. When you hear the computer initialize with a series of beeps, the server has finished with its boot sequence. Turn on the "Workstation" computer.
9. Turn on the computer monitor and wait for all systems to come up.

Note: the "Server" application software can only be displayed by selecting the "Server" icon from the Workstation.

When all systems have initiated, the Workstation's Desktop displays on the Transport's Touchscreen monitor with the necessary applications to set up the election.

There will be various application links on the Desktop. The following are important:

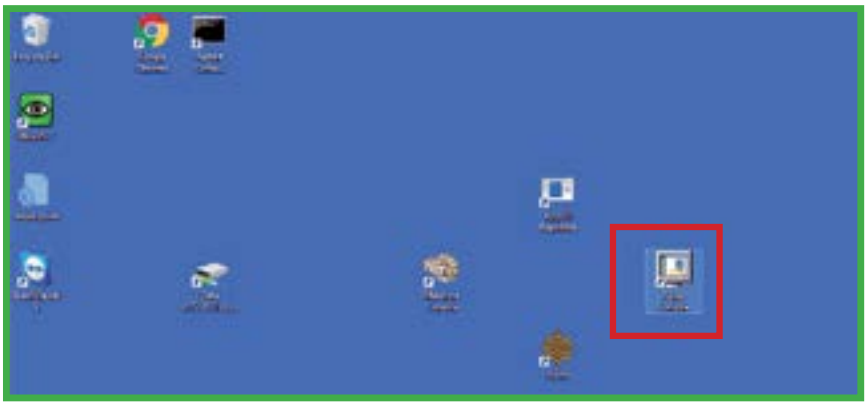


- **App ID Reprinter**: application that prints/reprints a tag with the AppID information for a particular ballot packet.
- **Google Chrome**™: recommended web browser for use with the Agilis. Is used to access the Agilis Console (*see* **Agilis Console** *section for more information*).
- **Helm**: application where scan passes are programed and run (*see* **Agilis Helm** *section for more information*).
- **Machine Console**: application used by Field Services for diagnosing, maintaining and servicing Agilis' equipment.
- **Teamviewer**: third party application used by Field Services to remotely control Agilis' computers for service reasons.

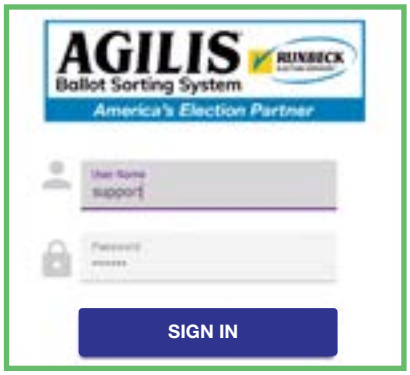
ACCESSING THE AGILIS CONSOLE

To access the Agilis Console:

1. On the Touchscreen monitor's Desktop, double press the Agilis Console icon.

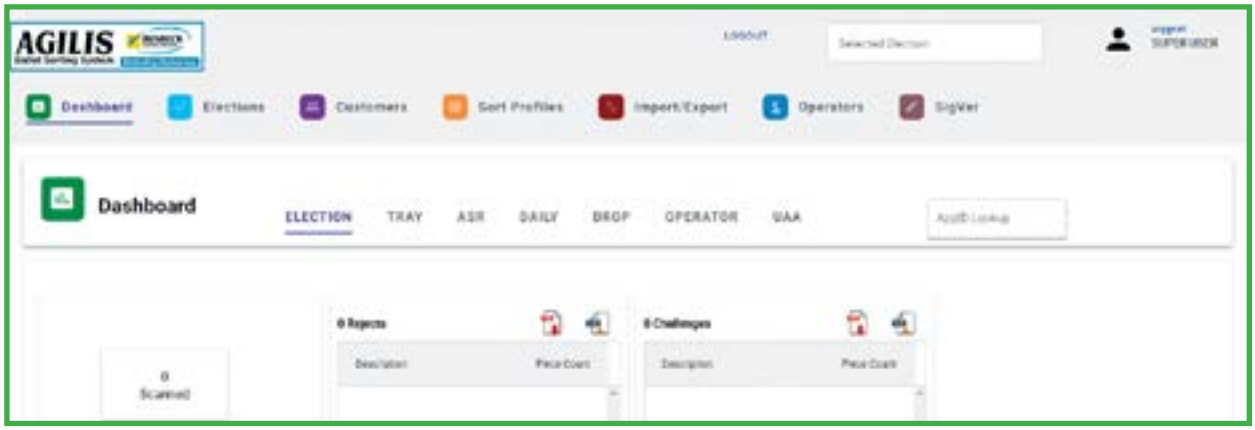


2. When the Google Chrome browser opens to the Console login screen, enter a **User Name** and **Password**. Then click SIGN IN.



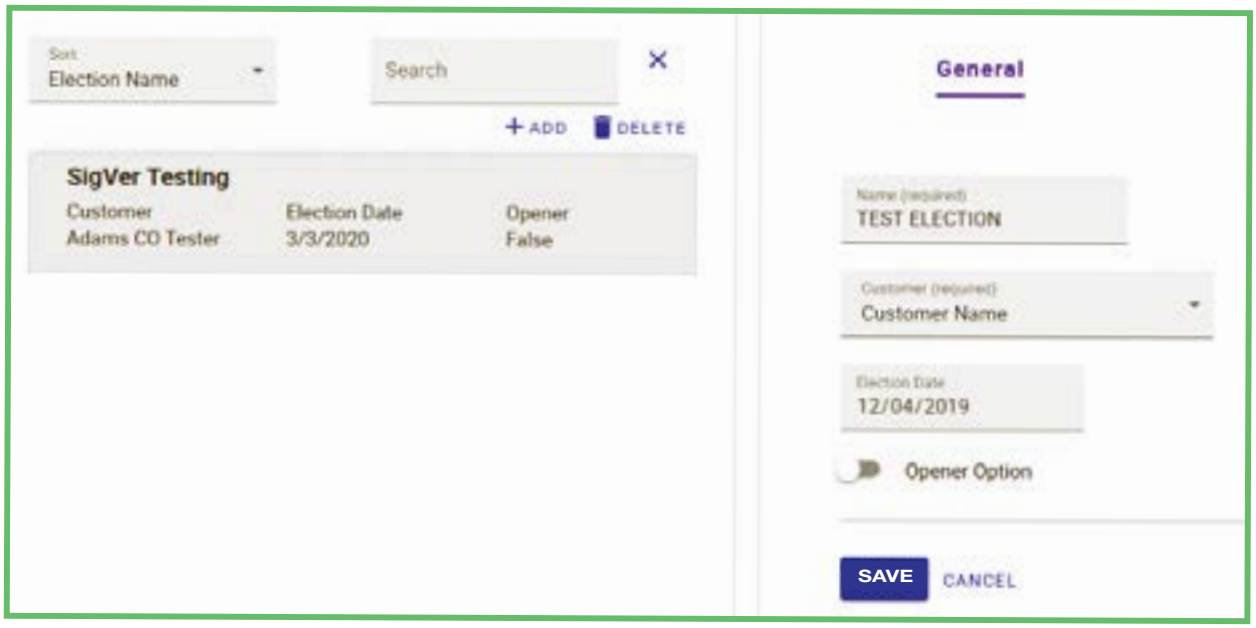
Note: Usernames and Passwords are case-sensitive.

The Agilis Console application opens to the **Dashboard** screen. The election can now be set up.



HOW TO SET UP AN ELECTION

The first step to create or "Add" the election takes place on the **Election** screen.

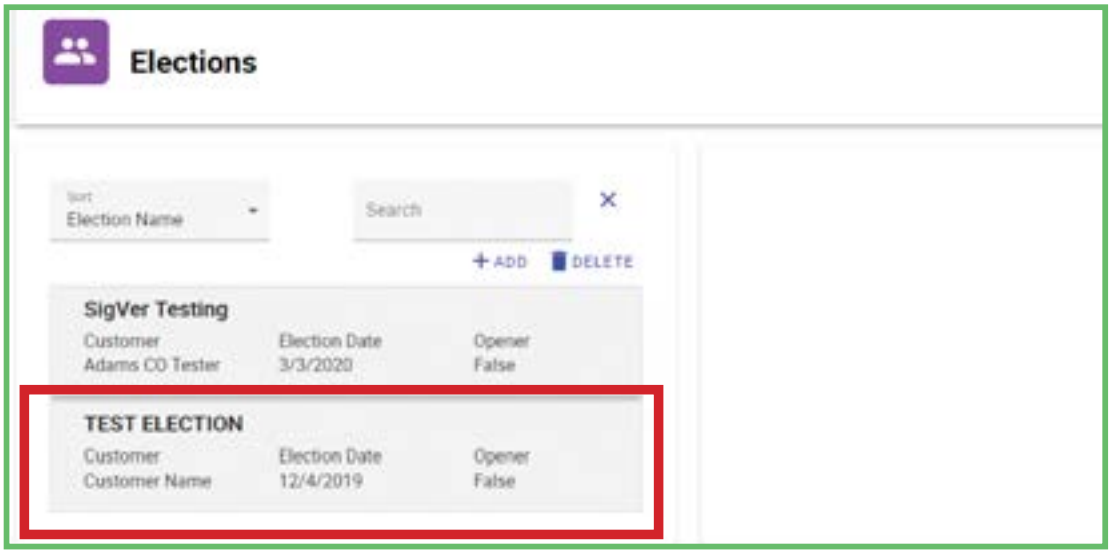


ADDING AN ELECTION

To add an election:

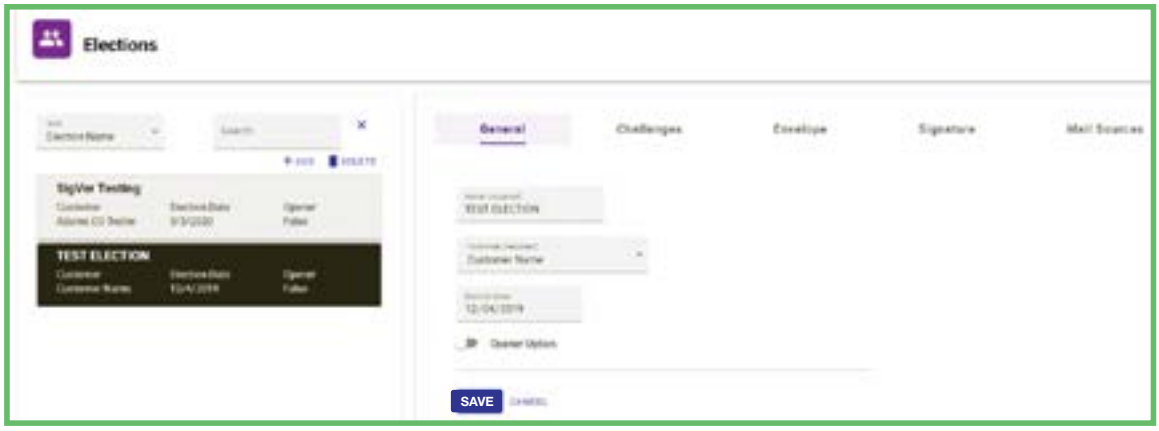
1. Click **+ADD** on the **Election** screen**.**
2. Enter a **Name** for the election.
3. Enter a date on the **Election Date** calendar control.
4. Select a value from the **Customer** drop-down.
5. Click **SAVE**.

The new election is added to the **Elections** screen.



EDITING AN ELECTION

After an election is created on the **Elections** screen, Users can access details. The **General**, **Challenges**, **Envelope**, **Signature** and **Mail Sources** tabs provide the necessary election-related setup functions to prepare to process ballot packets.

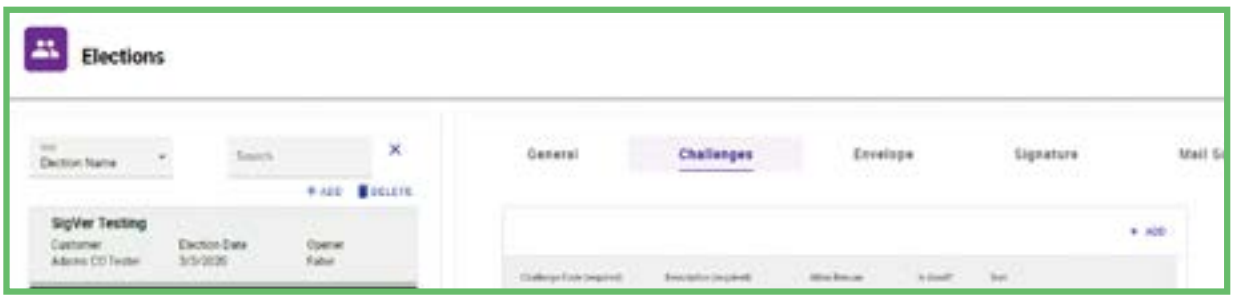


GENERAL TAB

The **General** tab allows Users to edit the **Election Name**, the **Election Date** and **Customer** information. Make the necessary changes and click **SAVE**.

CHALLENGES TAB

The **Challenges** tab provides set-up for processing ballot packets. It has controls to **Add**, **Edit** and **Delete** challenge codes. The first time Users access the **Challenges** tab the grid will display the "GOOD" challenge code by default.



Adding a Challenge Code

To add a challenge code click +ADD .

> **WARNING! NEVER change or delete any challenge code that has been set up prior to the election once ballot packets have been run through the system. This will cause the election data to be corrupted and be unusable.**

A new row is added to the grid:

1. Enter a name for the challenge code on the **Challenge Code** field.
2. Enter descriptive text for the code on the **Description** field.
3. If rescanning is available for the code, select the **Allow Rescan** checkbox.
4. More than one code can be marked as "Good". To mark the added code as Good, select the **Is Good** checkbox.
5. Enter a numeric value for the Sort column. This determines the order of the code in the drop-downs.
6. Click **Save**.

Editing a Challenge Code

To edit a challenge code:

1. Locate the challenge code to be modified and click EDIT .
2. Make the necessary changes to the challenge code.
3. Click **Save**.

Deleting a Challenge Code

To delete a challenge code:

1. Locate the challenge code to be modified and click DELETE .

That code will be deleted.

ENVELOPE TAB

The **Envelope** tab accepts the dimensions of the ballot packets to be processed. The fields in this tab are set to the correct specifications by a Runbeck Field Services at initial setup.

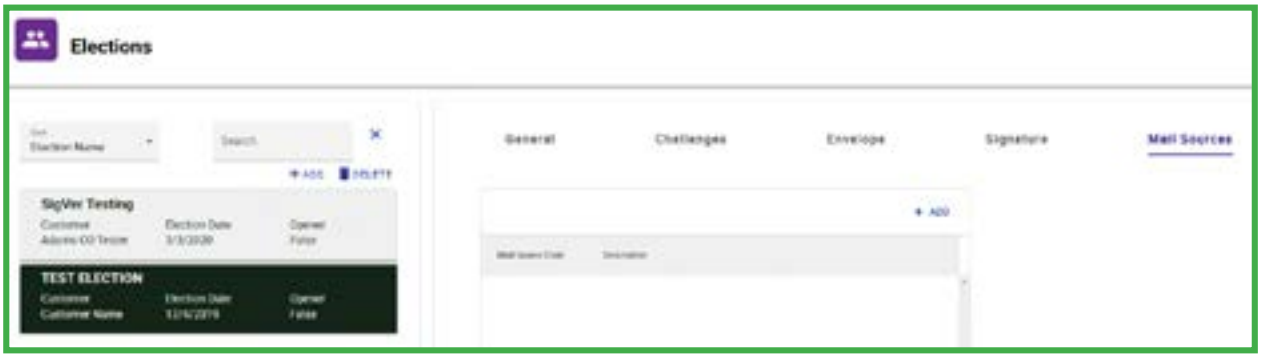
The fields within the Envelope tab represent dimensions of the ballot packet. When making changes ensure that the minimum values are **.5" shorter** than the ballot packet and the maximum values entered are **.5" longer** than the ballot packet.

SIGNATURE TAB

The **Signature** tab allows the image capture of signatures on ballot packets. It has elements to configure the signature. The fields are set to the correct specifications by Field Services during initial setup. If changes are required, contact Field Services.

MAIL SOURCES TAB

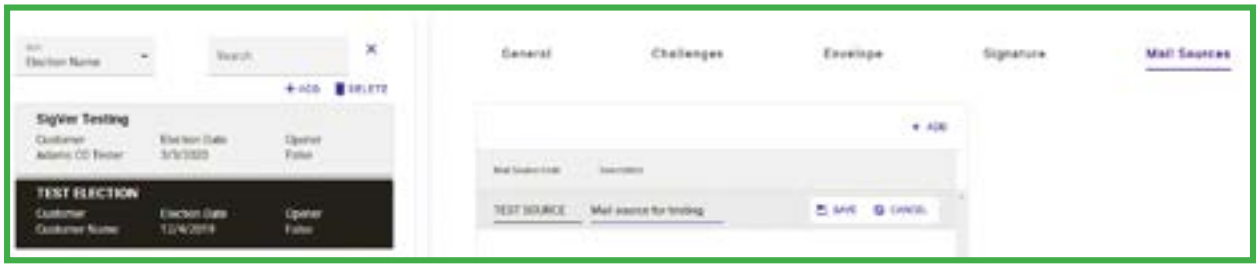
The **Mail Sources** tab is for ballot packet drop-off location set up. When a packet is processed, mail source information and additional details are displayed. The grid is empty by default.



Adding Mail Sources

To add the first mail source:

1. Click **+ADD** on the top-right of the **Mail Sources** grid.
2. Enter the name of the code in the **Mail Source Code** field.
3. Enter descriptive text for the code in the **Description** field.
4. Click **SAVE**.



The new mail source will be added to the grid.

Repeat steps 1–4 to add as many mail sources as necessary for the election in question.

Editing Mail Sources

Any added mail source can be edited. To edit a mail source:

1. Locate the mail source to be modified and click EDIT.

   The Mail Source Code and Description fields will become editable.

2. Make changes as necessary and click SAVE.

The changes are applied to the mail source.

Deleting Mail Sources

Any mail source that has been added to the grid can be deleted. To delete a mail source, locate it in the grid and click DELETE. It will be removed from the grid and will no longer be available.

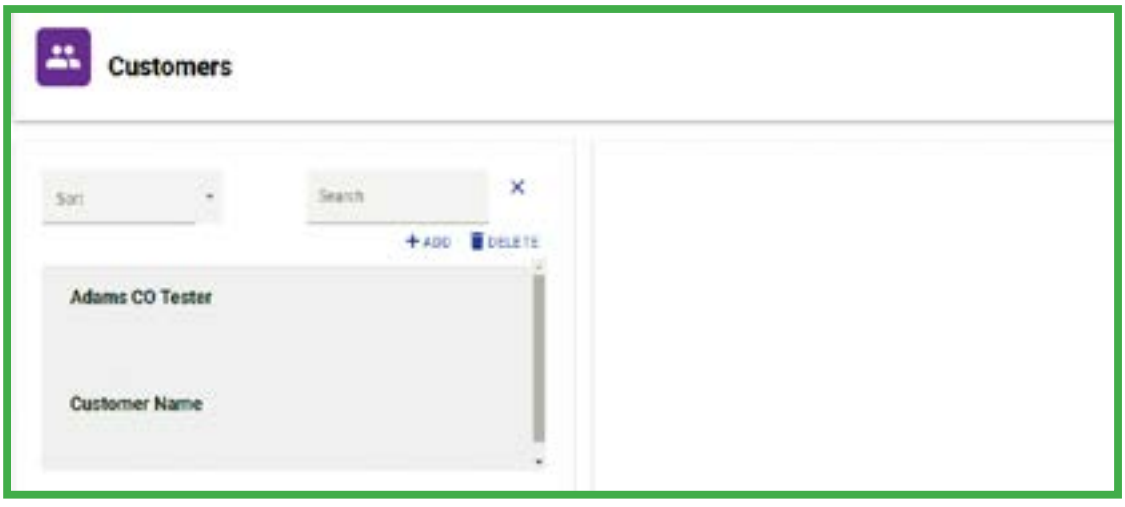
ADDING A CUSTOMER

Important! The Customer screen is used to configure Import and Export functionality based on jurisdiction requirements. It will be configured by Runbeck Field Services at the time of delivery to work for each jurisdiction's requirements. If a change is needed to a Customer setting it is STRONGLY recommended to contact a Runbeck Field Service Representative before changing settings.

To add a customer:

1. Click +ADD.
2. Enter the customer's name in the **Name** field.
3. Select the file type to be used on the **Ballot Import Format**, **Verification Export Format**, **Verification Import Format**, **Audit Export Format**, **Undeliverable Mail Export Format** drop-downs.
4. Click **SAVE**.

The new customer is added.



Important: You must select the newly added jurisdiction in the Customer's screen prior to scanning ballot packets. Failure to do so will cause ballot packets to be processed for the wrong jurisdiction.

EDITING FILE FORMAT SETTINGS

After a customer is created, the file format settings of Step 3 - **Adding a Customer** section can be completed. Some file formats don't have any corresponding setup. File formats that need setup have the ✎ icon. Click it to complete the setup.

Agilis supports Flat File and Web Service file formats.

Flat File Configuration

Flat files are to be used:

1. Upload the files for the Ballot Import, Verification Export, Verification Import, Audit Export and Undeliverable Mail Export to a location in the server computer. Be sure to record the network path for the location where they are placed.
2. On the **Flat File Configuration** dialogue:
   - Click ✎ next to the **Ballot Import Format** drop-down.
     - ✔ **Service Folder** field: enter the path to the folder on the drive that the Ballot Import file is located.
     - ✔ **Package** drop-down: select the menu item that corresponds with the Ballot Import flat file. Packages are sets of Dynamic Link Libraries (DLLs) that contain instructions for Agilis on how to process the file.
     - ✔ Click **SAVE**.

   - Click ✎ next to the **Verification Export Format** drop-down.
     - ✔ **Service Folder** field: enter the path to the folder on the drive that the Ballot Import file is located.
     - ✔ **Package** drop-down: select the menu item that corresponds with the Ballot Import flat file.
     - ✔ Enter a value in the **File Name** field.
     - ✔ Click **SAVE**.

- Click ✎ next to the **Verification Import Format** drop-down.
  - ✔ **Service Folder** field: enter the path to the folder on the drive that the Ballot Import file is located.
  - ✔ **Package** drop-down: select the menu item that corresponds with the Ballot Import flat file. Packages are sets of DLLs (Dynamic Link Library) with instructions on how to process the file.
  - ✔ Click **SAVE**.

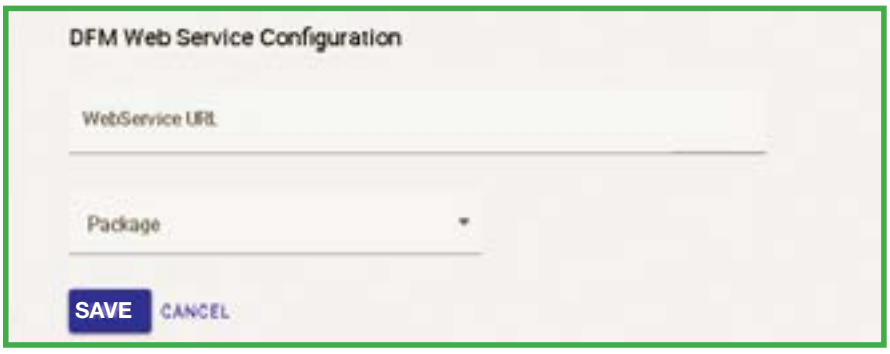
- Click ✎ next to the **Audit Export Format** drop-down.
  - ✔ **Service Folder** field: enter the path to the folder on the drive that the Ballot Import file is located.
  - ✔ **Package** drop-down: select the menu item that corresponds with the Ballot Import flat file.
  - ✔ Enter a value in the **File Name** field.
  - ✔ Click **SAVE**.

- Click ✎ next to the **Undeliverable Mail Export** drop-down.
  - ✔ **Service Folder** field: enter the path to the folder on the drive that the Ballot Import file is located.
  - ✔ **Package** drop-down: select the menu item that corresponds with the Ballot Import flat file.
  - ✔ Enter a value in the **File Name** field.
  - ✔ Click **SAVE**.

Web Service Configuration

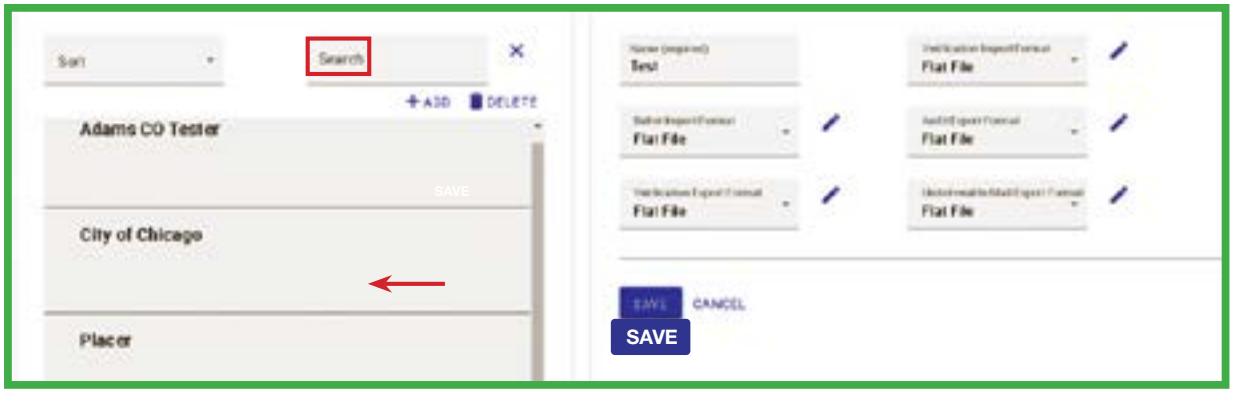
When a web service is to be used:

1. Click ✎ next to each of the file format drop-downs and on the **Web Service Configuration** dialogue:
   - Enter the network path for the web service in the **WebService URL** field.
   - Select a value from the **Package** drop-down.
   - Click **SAVE**.



DELETING A CUSTOMER

To delete a customer, select a value from the customer's list and click 🗑 DELETE.



A confirmation dialogue displays, click **DELETE**.

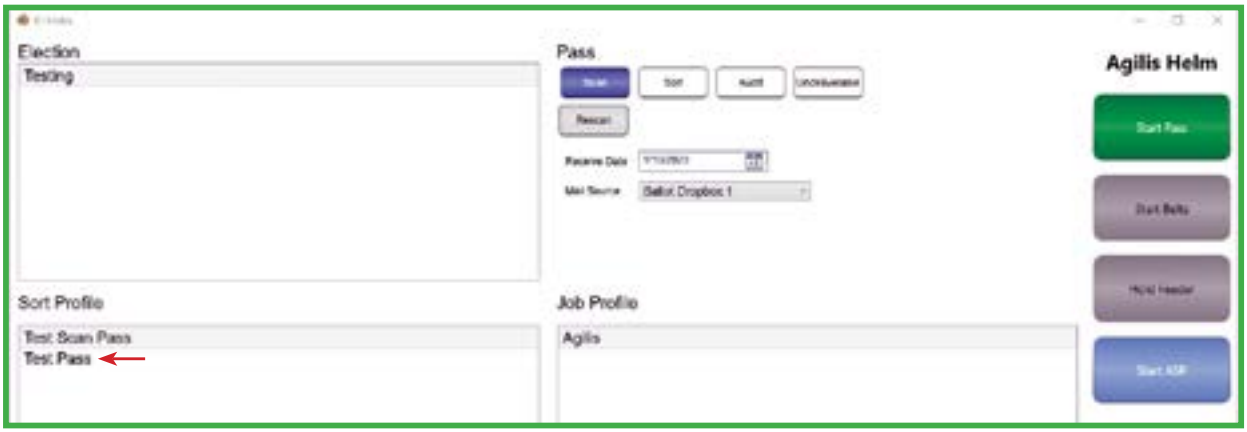
The customer will be deleted.

⚠ WARNING! DO NOT change or delete a customer set up prior to the election. This can cause the election data to be corrupted and be unusable.

ADDING A SORT PROFILE

To add a sort profile:

1. Click **+ADD**. The **General** tab will display on the right of the screen.
2. Enter the new profile name in the **Name** field. This name displays in the Helm on the **Setup** screen under the **Sort Profile** field.

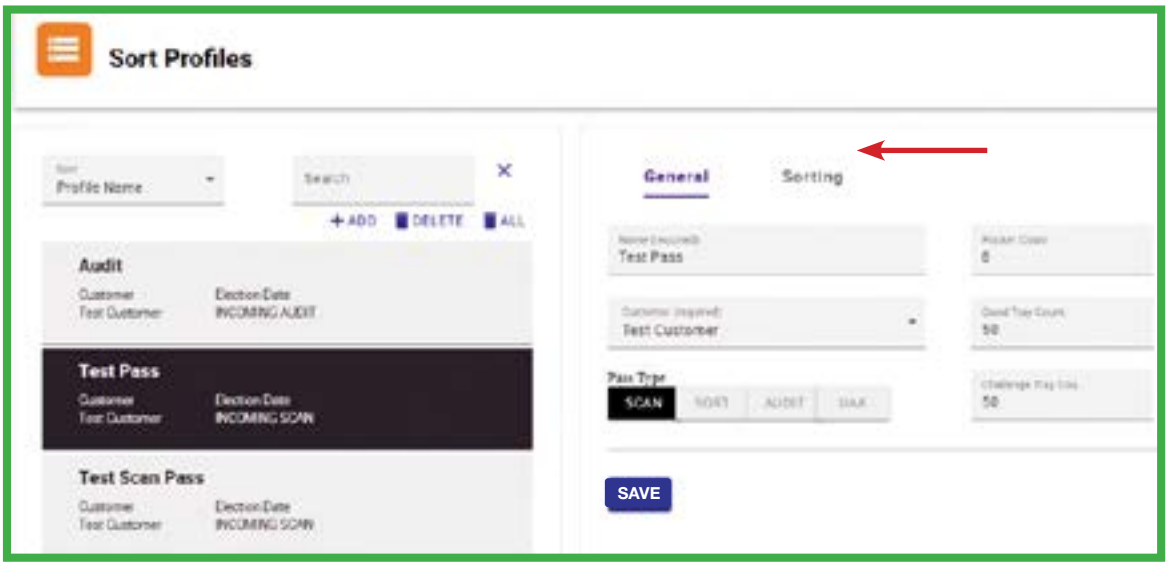


3. Enter a numerical value into the **Pocket Count** field which is the number of pockets used for sorting ballot packets. This is done in increments of four since each section of Stacker equipment comes with four pockets. The number of pockets will always equal the number of physical pockets on the Agilis.
4. Select the customer for the pass from the **Customer** drop-down.
5. Enter a numerical value in the **Good Tray Count** field. This is the number of ballot packets sorted to a pocket designated as a "Good" pocket. After the Good Tray Count number of good ballot packets is reached in the pocket, additional good packets are sorted to the next "Good" pocket. When all "Good" pockets are full, Agilis sorts any remaining packets to the "Overflow" pocket and stops the equipment.
6. Click the button to select the Pass Type which include:

   - **Scan**: sets the sort profile to work on an Incoming Scan pass which is the initial sort and first pass to collect election data. Ballot packets are stamped with "Date/Time" information. The signature on the packet is also scanned for use during SigVer.
   - **Sort**: used when doing precinct sorting. Sort passes can also be used to co-mingle challenges from an Audit Pass into their own groups.
   - **Audit**: occurs after SigVer. Ballot packets are run to sort out any challenged pieces and send all the accepted pieces to "Good" pockets. During this pass the opener is activated and all "Good" envelopes are opened.
   - **UAA**: processes undeliverable ballot packets returned to the jurisdiction by the US Postal Service.

7. Enter a numerical value into the **Challenge Tray Count** field. This is the number of ballot packets sorted to a "Challenge" Pocket.
8. Click **SAVE**.

The new profile will be added to the **Sort Profiles** grid. When at least one sort profile is added, the **Sorting** tab displays as part of the profile and is where a Group or sort pattern is built.



VIEWING A SORT PROFILE

To view a sort profile, select it and click on the **Sorting** tab. The information entered from the sorting profile in the **Pocket Count** field is auto-created to the same amount of boxes on this screen. Each box represents a pocket. Each pocket is comprised of a Pocket Type and Group with its corresponding Rules.

Pocket Types, Groups and Rules

The **Pocket Type** is a status designation assigned to a pocket. All ballot packets sorted to that pocket match the Rules defined in the Group that has been assigned to it. The three pocket types are:

- **Good**: the pocket containing ballot packets meeting all rules for moving into the next election processing scan/step.
- **Challenge**: the pocket containing ballot packets not meeting one or more rules and are to be prevented from being put into "Good" or "Reject" status. Further review is necessary.
- **Reject**: the pocket containing ballot packets not meeting one or more rules. They cannot be marked as "Good" and do not require further review. These ballot packets should be reviewed and processed using the rejection reasons found in the **Rejection Reasons** table.

A **Group** is a set of Rules used to route ballot packets to pockets during scan passes. Groups can be added and applied to one or more pockets.

Rules are reasons why a ballot packet is sorted to a pocket.

The first time that the Sorting screen is accessed for the sort profile, Agilis auto-assigns a Pocket Type and Group to each pocket using the following logic:

- First pocket: Pocket Type of "Rejects" and a Group name of "Rejects"
- Last pocket: Pocket Type of "Rejects" and a Group Name of "Overflow".
- In between pockets: Pocket Type of "Good" with a Group name of "Good" (see Diagram _: *Auto-Generated Groups and Rules* for more detail).

These designations are editable.

EDITING AND DELETING SORT PROFILES

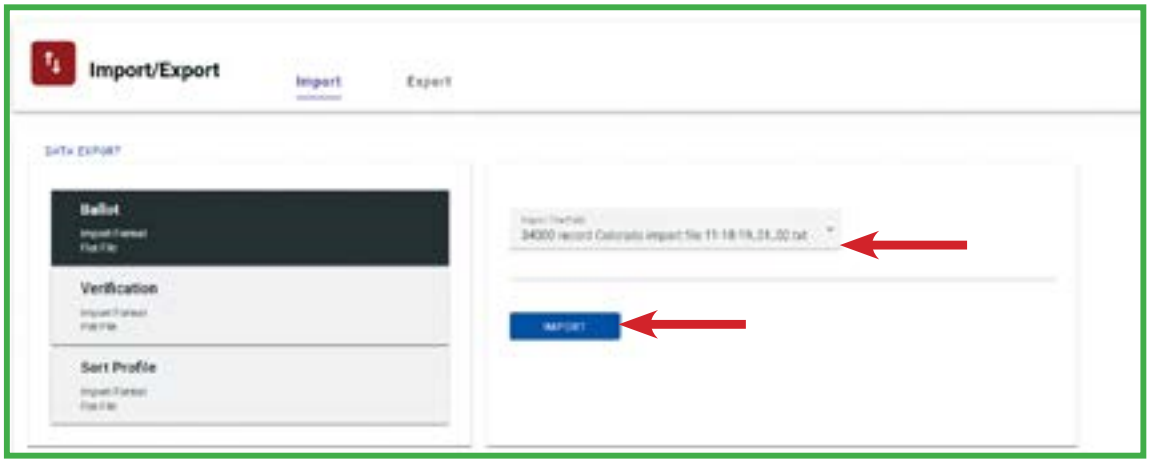
Sort Profiles control many aspects of Agilis' capabilities and should be handled with care. During initial install Runbeck Field Services establishes the jurisdiction's sort profiles. If changes are required, contact a Field Services technician to coordinate those changes using best practices.

SETTING UP IMPORT AND EXPORT

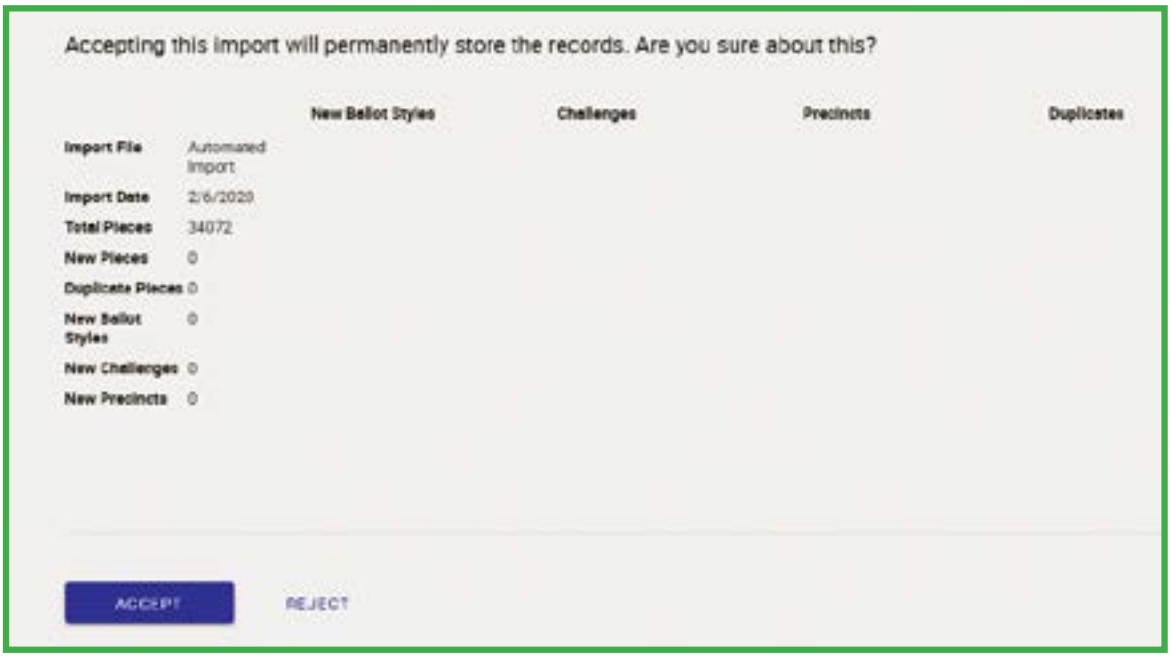
Setting up Imports and Exports is a jurisdiction-specific procedure which, on initial setup, is configured by Runbeck Field Services and seldom requires change. If changes are required, it is highly recommended that election officials consult Runbeck Field Services for assistance.

IMPORTING DATA

To conduct a .txt file import of VR data, the file must be placed in the folder on the Server that corresponds with the election being processed. When the Import file is in the correct folder, go to the Import/Export screen, select the file from the **Import File Path** drop-down.



A confirmation dialogue will display. Check the import information displayed in the dialogue and if it's correct, press Accept.

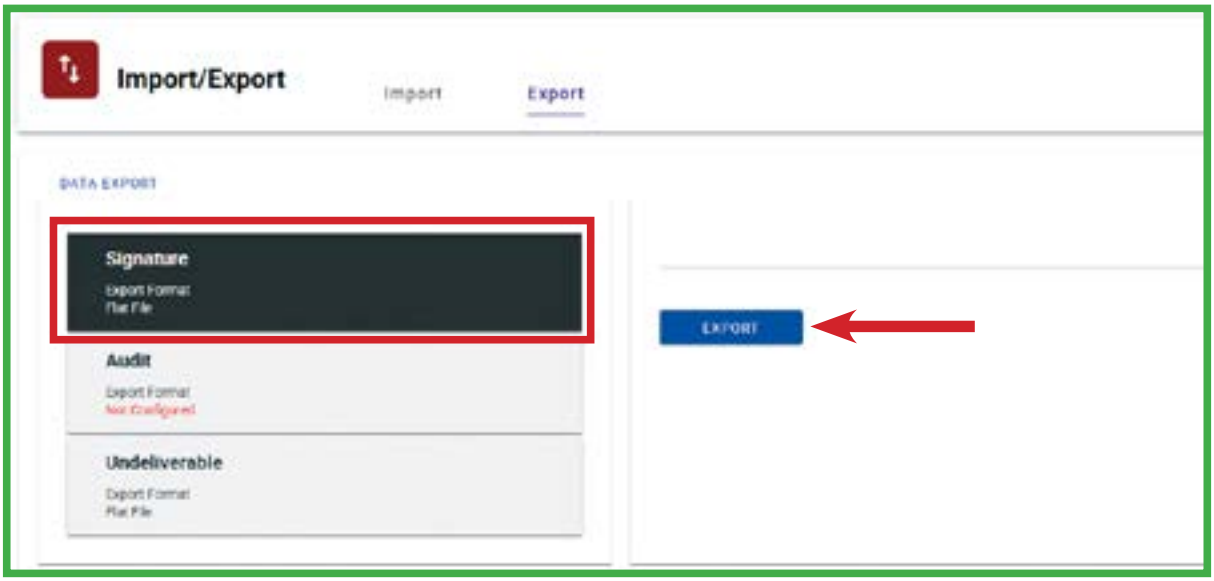


The file will be imported.

EXPORTING DATA

Export files are created by Agilis for upload into the jurisdiction's VR system.

To create an export .txt file or export data to a VR system, select the correct data button from the Data Export list and press **Export**.



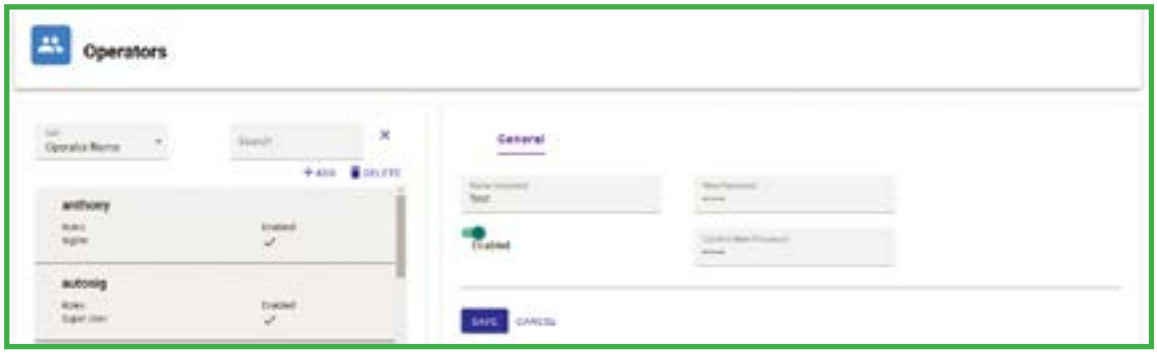
When a file is exported, it will be created and available in the folder on the Server that was configured during the original setup of the election to receive that type of export.

MANAGING OPERATORS

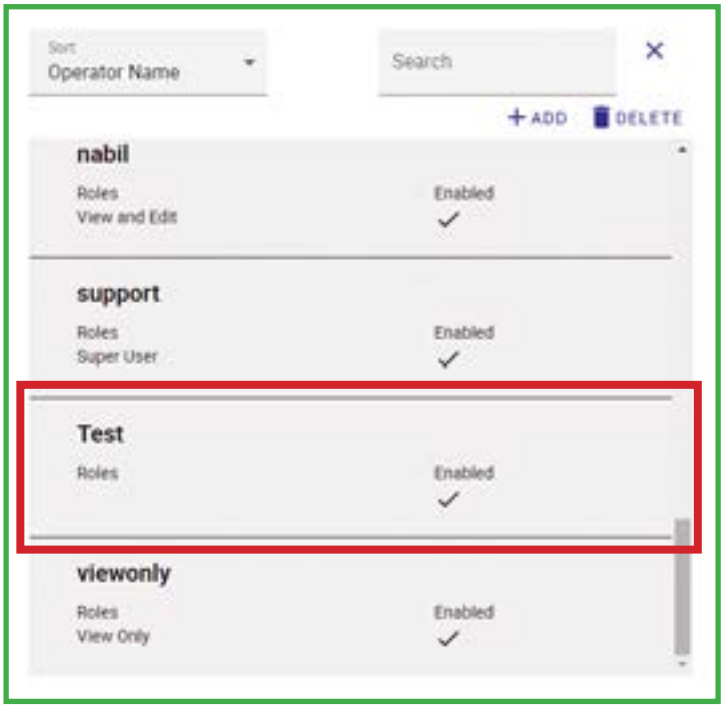
Setting up Operators gives Users access to the Console and its functionality. Users can add, edit and delete Operators.

ADDING AN OPERATOR

1. Click **+ADD** on the **Operators** screen.
2. Enter the new Operator's name in the **Name** field.
3. Create a password for the Operator, enter it in the **New Password** field and enter it again in the **Confirm New Password** field.
4. Make sure that the **Enabled** slider is toggled on. When toggled on it will be green.
5. Click **Save**.



Upon a successful save, the new Operator is added to the Operators list.



EDITING AN OPERATOR

Once an Operator has been added editing functionality is added to assign roles and customers to them. To edit an Operator:

Editing General Information

To edit an Operator's general information:

1. Select the Operator from the Operator's list.
2. Make one or more changes such as:
   - Modify the User's name.
   - Change their password
   - Toggle the Enabled slider
3. Press **Save**.

Editing Roles

To edit a User's role:

1. Select the Operator from the Operator's list.
2. Go to the **Roles** tab.
3. Tap EDIT next to the role that is going to be assigned to the User.
4. Tap the **Is Selected** checkbox for the role.
5. Tap **SAVE**.

Editing Customers

To edit the Customers assigned to a user:

1. Select the Operator from the Operator's list.
2. Go to the **Customers** tab.
3. Tap EDIT next to the Customer that is going to be assigned to the user.
4. Tap the **Is Selected** checkbox for the Customer.
5. Tap **SAVE**.

CONDUCTING SIGVER

SigVer is conducted in two phases: 1st Review and 2nd Review.

> ***Note: Remember always to select the correct election from the* Selected Election *drop-down on the top right of the screen.***

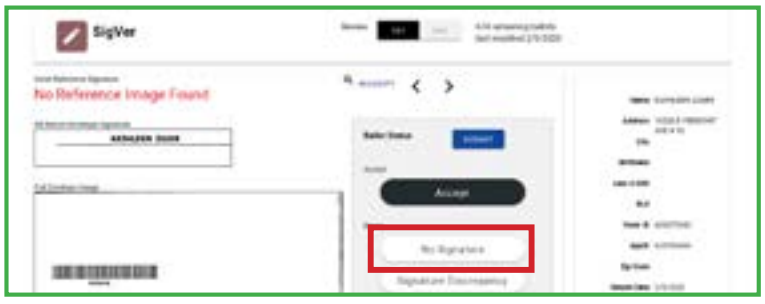
1ST REVIEW

To conduct 1st Review Signature Verification on the SigVer screen:

1. Press **SigVer** on the main menu to access the **SigVer** screen. The next available ballot packet displays.
2. Review all elements of the screen:
   - Voter Reference Signature
   - AB Return Envelope Signature
   - Full Envelope Image
   - VR information (on the right of the screen).
3. Compare the **Voter Reference Signature** with the **AB Return Envelope Signature** to see if they match.
4. Select the proper **Ballot Status** (i.e disposition) and press **Submit**:
   - If the Signature on the **AB Return Envelope Signature** field matches the **Voter reference signature**, and no other issues are found, press **Accept.**

   - If the Signature on the **AB Return Envelope Signature** field does not match the **Voter reference signature**, or other issues are found, press the correct challenge reason based on the jurisdiction's rules.

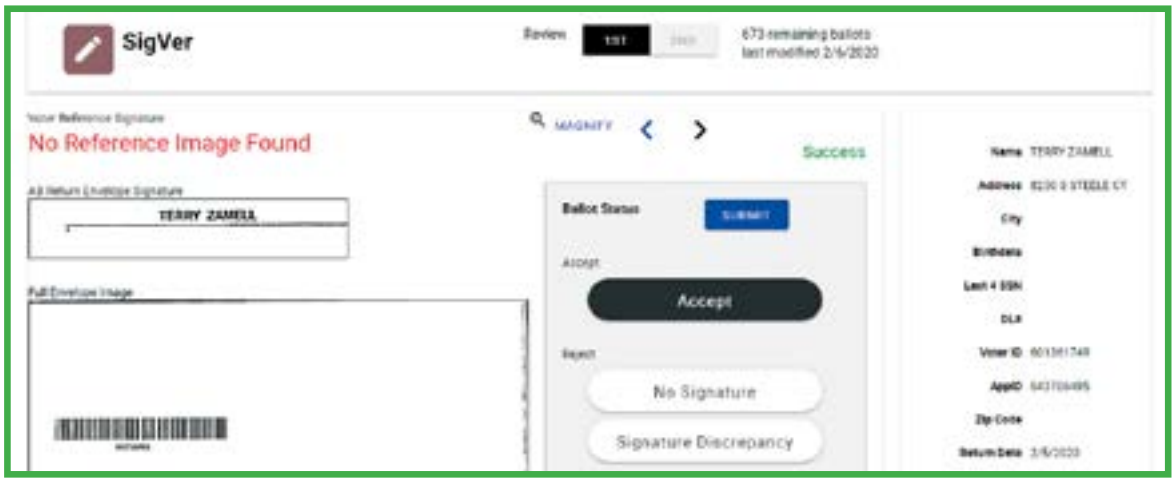
     Note: Disposition statuses vary by jurisdiction depending on the challenge reasons set up on the Challenges Tab. See this section for more information.



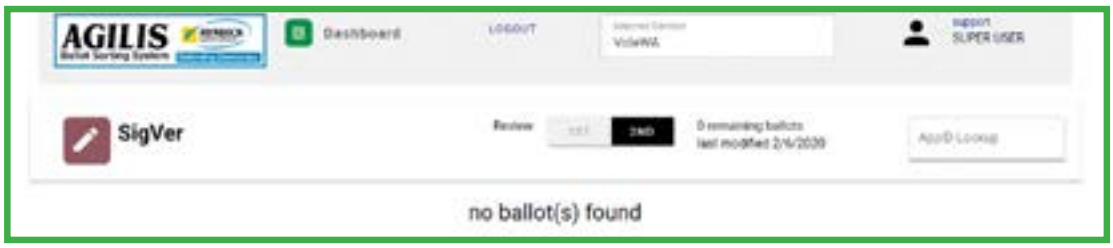
5. Press **Submit**.

   - If **Accept** was selected in step 4 the accepted ballot packet is placed in the **Ready to Sort** report on the Election screen.
   - If a Challenge reason was selected in step 4, the ballot packet will be queued for 2nd review.

A Success message is generated above the top right of the **Ballot Status** section. The next SigVer-eligible ballot packet displays until all packets have been assigned to a User.



When all ballot packets have been assigned to a SigVer reviewer, a "no ballots found" message displays.

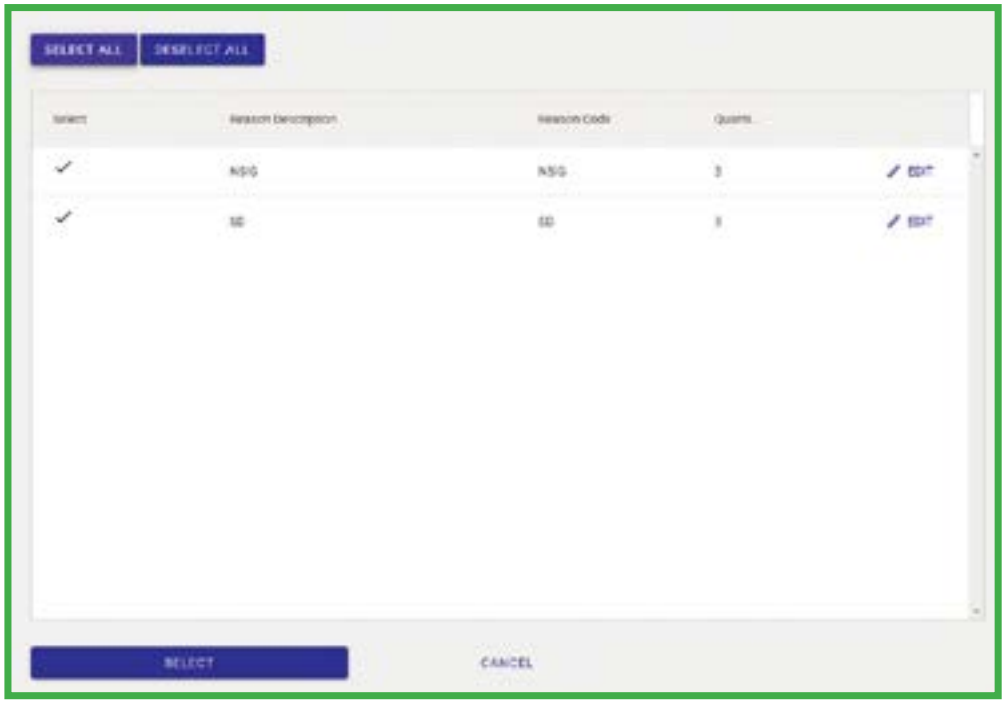


2ND REVIEW

When a ballot packet has been challenged, it is designated by the SigVer client as needing a 2nd Review. Users with 2nd review permissions can conduct the review using the following procedure:

1. Press the **2nd** button on the top center of the SigVer screen to access 2nd review functionality.

A selection grid displays the number of challenged packets by Reject reason. Press EDIT to review the ballot packets that have been challenged. Use **Select All** to review all ballot packets regardless of Reject reason. When finished making selections, press **Select**.



The first challenged ballot packet displays on the SigVer screen.

2. Conduct SigVer as it would be completed in a first review.

- If **Accept** is selected by the 2nd reviewer, accepted ballot packet is placed in the **Ready to Sort** report on the Election screen.
- If a challenge reason is selected by the 2nd reviewer, the packet will be assigned the challenged status. When run again during the Audit pass, it is sorted out.

Part 3 :: OPERATION

USING THE AGILIS

This section describes procedures for using Agilis to process ballot packets for elections.

PLACING BALLOT PACKETS ON THE MAGAZINE

Prior to running any kind of pass, Operators must ensure that ballot packets are placed according to the specifications created when setting up the pass. This is called "facing" the ballot packet, so when it passes through Agilis' camera, the barcode scanning, imaging and stamping of the ballot packet occur in the correct locations.

INCOMING SCAN PASS

The first pass that ballot packets are run through the Agilis is called the "Incoming Scan Pass". During this pass:

- Ballot packets will be scanned.
- A cropped image of the voter's signature will be recorded in the database for use in SigVer.
- An image of the entire ballot packet's signature side will be saved in the IMAGE folder.
- Date information will be printed on the packet.

PERFORMING AN INCOMING SCAN PASS

Note: any imports that will be used prior to the scanning of ballot packets must be performed prior to the incoming scan pass.

1. Import the necessary VR files prior to EACH scan to ensure that the most current voter information is being used.
2. Double-click the Helm button on the workstation to open the Helm application.
3. Select the appropriate election on the **Election** section.
4. On the **Pass** section, click **Scan**.
5. Use the **Receive Date** calendar to set the date that the current batch of ballet packets were received.
6. If the jurisdiction has configured mail sources, select a location from the **Mail Source** drop-down.
7. On the **Sort Profile** section, select *Incoming Scan*.

8. Select the correct option from the **Job Profile** section.
9. On the **Options** section, select the additional functionality to be applied during the pass. The following options are available:
   - Date Printed
   - Thickness Detect
   - No Signature Detect
   - Double Detect. This is turned on by default and cannot be turned off.
10. Load the ballot packets onto the magazine.
11. Press **Start Pass**.

When the pass is initialized, the **Engine Components** screen displays on the workstation. It diagnoses all the connections and sensors throughout the system. If the system is in good working order a green checkmark displays. Otherwise a red x displays.

SWEEPING POCKETS

When the Agilis runs, pockets fill up with ballot packets and require the pockets to be swept when it fills with about 50 ballot packets.

To sweep pockets:

1. Place a hand at the middle of the stack and put slight pressure to keep the ballot packets from falling toward you. With the same hand, maintain pressure against the ballots in the pocket.
2. With the other hand, pull the group of ballot packets closest to you out of the pocket and place it in the front of a mail tray. The paddle will automatically slide back up to rest against the ballot packets being held in place.
3. Continue this process for all pockets making sure to keep the ballot packets placed in each tray in the same order as they were in the pocket.

Note: if the pockets fill completely, the feeder on the Agilis will automatically shut off. The pockets should be cleared before resuming the pass.

INCOMING SCAN AND AUDIT PASSES

- "Good" ballot packets will go to the first designated "good" pocket, then automatically to the next designated "Good" pocket when the first pocket is full.
- Pull the ballot packets and keep them in order when placing them into the mail tray.
- Once the pocket has reached 300 (Incoming Scan Pass) and 100 (Audit Pass), a tray tag will print from the printer located above the pockets, and ballot packets will start going to the next designated pocket.

  Ballot packets should be cleared as the pockets are filling. If the ballot packets reach the sensor at the end of the pocket, the sensor will automatically stop the belts and stop processing ballot packets.

- Place the tray tag in the tag holder in front of the mail tray.
- Push the black pocket button that coordinates with the full pocket to clear the pocket.
- The next "Good" pocket will automatically begin filling after the first "good" pocket is full.
- Begin to pull the ballot packets from the pocket and keep them in order when placing them into the mail tray.
- Once the pocket has reached 200/100, a tray tag will print and ballot packets will start going to the next clear pocket again.
- Place tray tag in tag holder in front of mail tray
- Push the black pocket button that coordinates with the full pocket to clear the pocket.
- Place mail trays on the appropriate cart.
  - ✔ After Incoming Scan Pass > Ready for Sig Ver/Audit
  - ✔ After Audit Pass > Opened (for those pieces that have been processed as "Good").
- Assist Helm Operator with Reject pockets as required.
- Repeat process until all mail has been processed.
- Keep trays in order on the cart.

  Note: Other pockets may also be filling up and should be swept periodically. The process is the same for clearing mail by pressing the black button at the end of the pocket. This allows additional ballot packets to sort to these pockets. If additional storage space is needed during the pass, put the trays on the appropriate cart for further processing.

CLEARING A JAM

A jam can occur anytime ballot packets are passed through the Transport into the Stacker. The most common reasons for jams are:

- Piece fed through the feeder wrong.
- Piece had a rip or tear.
- Pieces were stuck together.
- Fingers were caught in a pocket when removing pieces.

To clear a jam:

1. Troubleshoot what may have caused the jam.
2. Leave unaffected pieces alone. If pieces look fine, they probably are fine.
3. If the jam occurs at a pocket:
   - Sweep the mail pieces that are already stacked in the pockets and place in their proper trays.
   - Correct the jam and place that mail in the overflow pocket also.
   - Start the belts back up to flush out the rest of the mail in transit. Do not start the feeder mechanism from the Helm.
   - After all ballot pieces have been cleared from the entire length of the equipment, stop the belts one more time. This is required to reset the thickness measuring sensor.
   - For any pieces that don't go to the overflow pocket and sorts to another pocket, move those packets to the overflow pocket.
4. Clear the pieces out of the feeder area.
5. Feed pieces a few at time to allow the Agilis to reset.
6. Review the process on how to Rescan/Rerun pieces.

Use caution when removing pieces from the Transport and Sorting Pockets. Do not bump or move sensors or camera unit. Ensure that all loose material has been removed. Avoid pulling the ballot packets straight up from the belts, rotate the belts to move the pieces along manually until you can remove them without affecting the belts.

AUDIT PASS

An Audit Pass functions much like an Incoming Scan Pass. It separates the ballot packets identified as "GOOD" from those that were Challenged during the ASR and SigVer processes.

During the Audit Pass every ballot packet from all trays should be run. When the Audit Pass is complete, every ballot that was not run through or detected by the system will be designated as "Missing" and placed in the Missing Piece report.

Missing ballot packets are those that have already received a disposition during ASR or SigVer. They are processed as missing because the equipment did not capture the ballot packets AppID during the pass.

Once the ballot packet is found, run it through the equipment and it will be routed to its original disposition and be removed from the Missing status.

SORT PASS

A Sort Pass is used to sort ballot packets down to a precinct level. This pass can also be used to sort co-mingled challenges from an audit Pass in their own challenge groups. This occurs when not many pockets are available.

Setting up Sort Passes for precinct sorting can be very complex. It is recommended to coordinate with Field Services to ensure it is set up according to best practices.

TURNING THE AGILIS OFF

To turn the Agilis off:

1. Make sure that all applications on the Workstation are closed correctly. Failure to close all applications correctly before powering down the system may cause data corruption. Check the following areas on the Workstation:
   - Log out of the Helm and Console.
   - Close any file explorer windows that may be open.
2. Select the Server icon from the Workstation screen.
3. The Server screen will appear as a green screen. Left-click on the "Start" button in the lower-left corner and select the "Shut Down" option.
4. Once the server has been shut down, select the "Start" button in the lower left corner of the workstation screen. Select "Shut Down".
5. Turn off the white "rocker" switches in the left cabinet. Start at the far left and work toward the right (i.e. "Aux", "Outlets", "Motor" and last should be "Main").

Part 4 :: MAINTENANCE

CARING FOR THE AGILIS PROPERLY

The Agilis is highly engineered, commercial-grade equipment. Taking proper care of the equipment ensures that the Agilis functions for many years. Adhere to recommendations for daily, weekly, monthly, quarterly, bi-annually and yearly maintenance.

DAILY MAINTENANCE

It is important to keep the Agilis clean and free from debris and paper dust.

It is recommended that the Agilis be cleaned at a minimum prior to a daily scan.

Do not clean or vacuum the camera. Any movement of the camera lens prevents barcodes and signatures from being read properly. Gently blow off dust from the lens.

- Vacuum and dust the inside of the Agilis including the Transport and Pockets prior to beginning a daily scan. Depending on the size of the run, it may be necessary to pause during the Audit Pass to clean area around the opener to ensure accurate processing. Use compressed air to blow out debris and dust around the opener.
- Vacuum and dust around the feeder mechanism and the pocket area.
- Take the Plexiglas guards off the pockets and use low pressure compressed air to blow out debris from around the belts and sensors. Never use high pressure air or it will force dust into unwanted areas and could damage the equipment or reduce performance.
- Wipe off sensors with a lint-free cloth.
- Wipe off all Transport sensors with a lint-free cloth.
- Wipe the ink cartridge using the provided lint-free wipe cloths slightly dampened with water.
- Use Windex wipes to clean the inside covers of the Transport.
- Check Feeder belts and replace if necessary.
- Wipe the rods on the pockets.
- Close the Plexiglas guards. Ensure that the E-Stop buttons have not been depressed.
- Use Windex wipes to clean outside covers of the Transport.
- Check tray tags and label printer and replace supplies as needed.
- Ensure that a supply of mail trays are positioned near the pockets.
- Check compressor drainage bottle.
- Empty Opener dust/residue bottle as needed.

Never use chemical cleaners on any part of the Agilis.

WEEKLY MAINTENANCE

- Check the compressor. It is very important to check the air compressor oil level. Only use compressor oil ordered through Runbeck Field Services when adding oil.
- Check the reservoir to make sure it is draining properly. It may need to be emptied.
- Hit the E-Stop and check the interlocks.
- Check all belts for cracks.
- Examine air supply connection for leakage.
- Examine all rollers for free rotation and excessive play.

MONTHLY MAINTENANCE

- Check all blue belts for wear.
- Rub down the linear shafts with oil which has been provided.
- Empty the water container that the air compressor drains into.
- Vacuum out the filters for the fans installed above the PCs.

QUARTERLY MAINTENANCE

- Camera Calibration check.
- Make sure there are no air leaks. Watch digital pressure gauge on the back of the machine near compressor to see how fast the air pressure drops when ending a pass.
- Inspect kicker assembly for wear.

MAINTENANCE EVERY SIX MONTHS

- Check camera connections.
- Replace the air filter elements and clean filter bowl.
- Check pneumatic tubing for cracks and wear.
- Check UPS.

ANNUAL MAINTENANCE

- Examine all moving parts for excessive wear.
- Make sure that LEDs light up along Stacker and pocket full indicator.
- Open and vacuum out computers.

Part 5 :: TROUBLESHOOTING AND SUPPORT

RESOLVING ISSUES

Review this section when issues arise and for recommendations to keep Users safe.

TROUBLESHOOTING

The list below provides common issues when using the Agilis and the resolution:

Issue	Resolution
All ballot packets are going to "Camera Reject" status	1. Check that the camera's lens cap has been removed from the lens. 2. Stop the belts and restart the Camera Service using the **Restart Camera Service** shortcut on the Workstation's Desktop.
Release Feeder button on the Helm is grayed out	This is a sign that a pocket is full. If this occurs at the beginning of a pass, close and clear all pockets.
"Transport not Ready" warning when starting a pass	Check that both the E-Stop and Interlock (Green) lights are lit in the electrical cabinet. Press the blue Reset button to illuminate the lights.
"Helm failed to connect" warning when starting a pass	Check that both the E-Stop and Interlock (Green) lights are lit in the electrical cabinet. Press the blue Reset button to illuminate the lights.
Cannot log in because the Console opens and immediately closes when trying to launch the application.	Restart the Agilis Console Service suing the desktop shortcut located on the Server Desktop.
All ballot packets are going to the "Reject" pocket.	Check that the following Helm features are set correctly: ■ Check Box Detect ■ No Signature Detect

SAFETY AND COMPLIANCE

- ➔ Read all instructions before operating the equipment.
- ➔ Inspect equipment and follow all safety guidelines on the machine.
- ➔ Use this equipment only for its intended purpose.
- ➔ Place the equipment close to an easily accessible wall outlet.
- ➔ Place the equipment in an accessible location to allow for proper ventilation and easily accessible for servicing.
- ➔ Plug the equipment directly into a properly grounded wall outlet located near the equipment and easily accessible.
- ➔ The equipment has various safety mechanisms designed to protect Users from bodily injury. DO NOT disable them while the equipment is being operated.
- ➔ Keep the Lexan cover which protects all the internal equipment in the closed (down) position when the equipment is in use.
- ➔ Always keep fingers, long hair, jewelry and loose clothing away from moving parts.
- ➔ Avoid touching moving parts or materials while the unit is in use. Before clearing a jam, be sure the equipment's mechanisms come to a complete stop.
- ➔ DO NOT remove covers. Covers protect hazardous parts that should only be accessed by properly trained service personnel.
- ➔ Operation of this equipment without periodic maintenance will inhibit optimum operating performance and could cause the equipment to malfunction.

FCC Statement

This device complies with Part 15 of the FCC Rules. Operation of this product is subject to the following two conditions: (1) this device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation. Changes or modifications not expressly approved by the party responsible for compliance with the FCC Rules could void the User's authority to operate this equipment.

SUPPORT

The User Guide was developed as a tool so Users can quickly resolve issues they may encounter during elections. Please refer to this User Guide to find answers to your questions. If you need further assistance or immediate answers, you may reach out to the Field Services Team.

Reporting Issues

Contact your Runbeck Field Services Technician or call 1-877-230-2737 to consult with Field Services Team.

General Contact for Runbeck Elections Services

1-877-230-2737 or 1-602-230-0510

2800 S. 36th Street, Phoenix, Arizona 85034

www.Runbeck.net

Runbeck Election Services and Solutions

Runbeck Election Services, Inc. has provided election solutions since 1972. Runbeck successfully innovates the process of producing elections for jurisdictions around the country. Our expertise is trusted to deliver customized election solutions. We touch more than 42 million registered voters—that's 22%—and we value every single one.

- Print & Mail - Ballot Production Services
  Technology-driven, accurate and reliable ballot print and mail processing of in/outbound mail ballots completed in one secure location. Services include a 100% chain of custody with full control of the client's data, printing, inserting, mail sorting and final audit paperwork. *Automated systems eradicate errors of manual insertion which lowers costs and increases speeds for successful elections.*

- Agilis® Ballot Packet Sorting System
  The Agilis Sorting System is an innovative ballot packet sorting solution that makes vote-by-mail ballot packet processing quick, easy and affordable. It's a customizable, portable and an ideal inbound packet processing system. Product features include: scalability for sorting needs, automated Image capture and signature verification, time/date stamp and full audit capabilities.

- AgilisDuo™ Tabletop Ballot Packet Sorting System
  The AgilisDuo is an innovative low- to mid-volume ballot packet sorting solution. As a tabletop sorter, it allows counties with lower volumes to reduce costs and get faster tabulation results and immediate updates to VR databases. The AgilisDuo delivers exceptional throughput, scanned image quality for signature image capture. **Do in three hours what would take three days!** Download our AgilisDuo Case Study at www.Runbeck.net/Resources.

- Verus™ & Verus Pro™ Automatic Signature Verification
  This innovative software and computer evaluates current signature images from the sorter folder and compares them to the reference images from the voter registration database. Automated Signature Verification saves time and ultimately prepares ballots for faster tabulation. Verus works with the Agilis Sorting System and the Verus Pro integrates with a client's current inbound sorter.

- Vocem™ Petition Management Software
  Using advanced technology for signature and address recognition, Vocem streamlines the petition process accurately for faster results with automated row count along with name, address and signature comparison. The easy-to-use software integrates with any VR database and places updated petition information into that database. Vocem produces audit trails and reports in expedited time.

- Sentio Ballot Printing System® - Bulk and On-demand Printing
  This Software System provides election officials the ability to produce ballots on-site and on-demand— from individual early voting or counter ballots to vote center and absentee ballots. The software can work with multiple state-of-the-art printers to produce varying quantities. The custom cart option provides convenience in transporting and storage. It's flexible, secure and cost-effective, and jurisdictions print correct ballots with complete accuracy and a full audit trail.

Our equipment, software and production methods provide peace of mind during elections. All hardware, software and printing services are completed in the United States—no offshore resources are used! The best Service along with advanced technology ensures that our partners receive reliable solutions.

Simulo® UOCAVA EBallot Duplication System

Simulo Software is uniquely designed to duplicate live UOCAVA eballots. Election Officials can print tabulation-ready paper ballots that match the voter's electronic selections. It can be coupled with the Sentio Ballot Printing System to print UOCAVA ballots in minutes. The Simulo/Sentio compatibility is the perfect on-site solution to save time and money and eliminate human error.

Novus® Ballot Duplication Software

Officials can recreate damaged ballots onscreen within a secure and transparent environment. Novus software allows jurisdictions to process up to 150 ballots/hour vs. 30 ballots/hour with traditional methods. It features full audit and faster tabulation reporting, duplicate ID to eliminate errors, a time-stamped processing queue window and screen compatible with touchscreen.

Sollus™ - In-house Ballot Printing

Sollus Software along with the Sentio printer gives small to midsize counties control of their own ballot printing in-house. Sollus allows Users to save time by printing when their schedule allows instead of waiting behind large print jobs. Several features include: reprinting of damaged ballots, easy-to-use software and installation support, control over distribution and long-term ROI.

Service -

✓ Client Services Management

Runbeck's Client Services Management process begins with a face-to-face requirements session and is followed by comprehensive "backward pass" scheduling. Production is adjusted and customized to your needs to ensure that all printing and mailing services are completed on or before scheduled dates.

✓ Customer Service

Support is available for all of election or specific project needs. The Field Services team provides services and support. Our Field Services team members work with Client Services Managers to coordinate support and service. We use a support model that includes telecommunications and in-person service. Runbeck works to deepen the understanding of our partner's operation and environment to build and deliver quality support.

Cybersecurity - Guidance, Security, Training and Support

Runbeck provides safety through securing the highest level of cybersecurity to ensure clients are prepared to address all cybersecurity challenges. The range of services include guidance and assessment, full issue mitigation, full security monitoring, incidence response and preparedness tabletop exercises and Cyber Academy.

NOTES

Defending Democracy since 1972

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