myES&S

Customer Self-Service Web Portal

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What is myES&S Portal?

With our customers' needs in mind, ES&S has developed an online portal called *myES&S* to help election officials prepare for elections. This portal is a convenient way to access election tools online any time. Access is secured with the use of a username and password authentication.

What's in this guide?

This guide explains the features of the portal. It also provides step-by-step instructions on each task in the portal.

What can I do in the portal?

•Complete Election Forms
- º   Pre-Election Questionnaire
- º   Contest and Candidate Forms
- º   Coding and Audio Forms
- º   Printing Quantities and Specification Forms
- º   Balotar Forms
- º   Vote-by-mail Forms

•Set up notifications sent by email when new product documents
are released

•Submit return materials authorization requests (RMAs)

•Access helpful documents, bulletins, and manuals about ES&S products

Why use myES&S?

The *myES&S* portal provides you a convenient way to manage elections. You don't need to hassle with sending forms and notifications through email, faxes, or mail. It provides an easy way to complete and submit election forms.

ES&S asked users why they appreciate myES&S Portal:

•One site holds all the important documents, news, and information about ES&S products, services, and upcoming elections

•Forms from previous elections are stored in the portal, giving the capability to copy previous information into the new form to avoid the repetition of entering the same information

•Order tracking available for audio programming along with ballot printing and coding

•Able to simply view account information, including contacts and address

•24/7 access to the Online Supply Store

Request Access

- ① • Visit www.essvote.com
- ② • Click *myES&S* **Portal** at the top of the page
- ③ • In the "Request Portal Access" section, enter all required fields and click **Register**

  Note: After clicking **Register**, an email message will automatically be sent to the account's manager. You will be notified with your username and password through your provided email. Eligibility is verified with the County or State before the account is created.
  All requests are not guaranteed eligibility.

  •
  You may also contact Customer Support at:
  CustomerSupport@ESSVote.com
  1-877-377-8683, Option 6
  •

Log In

- Open the IE web browser
- Visit www.essvote.com
- ① Click *myES&S* Portal at the top of the page
- ② Click **Login** under "Already Have An Account?"
- ③ Windows Security dialog box prompts you to enter User Name and Password
- Browsers may also require Domain
  - ○ If browser requires Domain, preface the user name with the domain. It will look like: 10.0.2.152\username
  - ○ If Domain does not change to 10.0.2.152\, select "Use another account"

Note: Password is case sensitive

Customer Portal Home Page

Go to Election Forms

① • Click **Election Forms** on *myES&S* homepage
  • Election List page opens
② • Select the relevant election date
③ • Click **Forms Guide** for specific instructions on completing election forms

Note: If the election date is not listed, please call **877.377.8683, option 6** or email **customersupport@essvote.com**

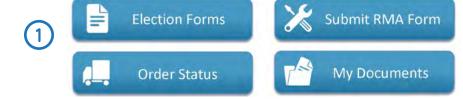| Election Date	Election Type
01/05/2017	City General
09/01/2016	General
08/29/2016	City General
08/04/2016	Primary
08/02/2016	Primary
08/01/2016	Primary
07/15/2016	Special
07/01/2016	Primary
06/22/2016	Primary
06/01/2016	City General
05/16/2016	Special
05/16/2016	Special
03/08/2016	Primary
03/01/2016	Primary
02/13/2016	City General
02/06/2016	Primary
11/19/2015	City General
08/11/2015	General
08/10/2015	General
08/05/2015	Special
08/04/2015	General
07/14/2015	City General

① [Election Forms]   [Submit RMA Form]
   [Order Status]   [My Documents]

   [My Account]

Election - 01/05/2017 - Pre-Election Questionnaire

Created: 01/05/2017 10:00   Modified: 01/05/2017 10:00

[Save] [Forms Guide] [Printable] [Form Complete] [Go Back]

* Please note. The dates in red reflect the day you will hold the following tests, only fill out the ones that apply

General Information

Account	State of Independence
Contact	
Election Date	01/05/2017
Election Title	
Election Type	City General
Election Day Time Polls Open	
Election Day Time Polls Close	
UOCAVA Date	/ /
Public Test	/ / *Public review of coding materials*
Pre-Test	/ / *Pre-Election review of coding materials*
L&A Test	/ / *Logic and Accuracy test of coding materials*
Early Vote Open Date	/ / *Date that Early Voting begins*
Early Vote Close Date	/ / *Date that Early Voting ends*
Early Vote Time Polls Open	
Early Vote Time Polls Close	
Absentee Date	/ / *Date that absentee ballots must be delivered to client.*
Candidate Certification Date	/ / *Date that finalized list of candidates is available*
Number of Precincts	0

ES&S Services Requested

Paper Ballot Layout	
PDF Extracts (optional)	
Publication Ballot (optional)	
Sample Ballot Modification (optional)	
Sample Ballot Instructions (optional)	
Printing	
Vote-By-Mail	
Is this an all-mail election?	
Coding	
Audio Files	
Pollbook	
Site Support	
Additional Languages	
Additional Languages Used	
Ballot-On-Demand Files	
Ballot Online (UOCAVA)	
ExpressPass Sample Ballot	
Election Night Reporting	
Ballots Printed By	
Tabulation Software	
ERM Delivery Method	
Additional Notes	

Shipping and Billing Information

Coding Shipping Contact Info (If information is different from the previous election)	
Coding Billing Contact Info (If information is different from the previous election)	
Printing Shipping Contact Info (If information is different from the previous election)	
Printing Shipping Contact Info (If information is different from the previous election)	
Alternate Shipping Contact Info (If separate shipping arrangements are required)	

Election Equipment

[Add Equipment] [Delete]

Equipment	Count

View Election Status

To view the status of Ballot Layout, Ballot Printing, and Coding:

① • Click **Election Status** on the *myES&S* Customer Portal home page

• Click the Election date related to the order status inquiry

• Status information about ballot layout, ballot printing and coding is listed on Election Status Information page

② • Click [Milestone Definitions] to understand what is completed as stages progress (see Page 8 for definition list)

Note: Expected completion timeline in the absence of an Election Calendar:

•**Ballot Layout** requires five to seven working days from the completion of forms to first proof to finalize.

•**Ballot Print** needs seven to ten working days to complete after proofs have been signed off

•**Coding** requires five to seven working days to complete from the receipt of test ballots

View Order Status

Milestone Definitions

Ballot Layout

In-Process	Layout work is underway and initial proofs will be sent to the client shortly
Initial Proofs Sent	First set of ballot artwork proofs have been sent to the client for review and approval
Sign Off	Ballot artwork proofs have received final approval by the client

Ballot Printing

Files Sent to Printer	Final ballot artwork has been forwarded to the Print Services department
Ballots Printed	Ballots have been printed and readied for shipment
Absentee Shipped	Absentee Ballots have been shipped from the printer and are en route to the client
Official Shipped	Official Ballots have been shipped from the Printer and are en route to the client

Coding

In-Process	All necessary coding materials (media, forms, etc.) have been received and an ES&S associate has initiated work on this account
Test Ballots Received	Test ballots have been received from the printer, and testing of the election definition will be started shortly
Testing/QC/Media Burned	The election definition is under review and will be shipped upon completion
Shipped/Files Transfered	The election definition has been tested and coding media and/or the results database has been sent to the client
Tracking #	The tracking number that identifies the shipment containing the election materials is included here. Use the appropriate vendors website to find up-to-date information on the status of this shipment

Check Your Account Information

To view your account information and check alerts:

① • Click **My Account** on the *myES&S* Customer Portal homepage

② • Your customer profile page allows you to view general information (e.g., name and address) and content information

③ • Click [Alerts] to go to the **Document Alerts** page. From there, you can see which product alerts you have subscribed to and to designate who receives the alerts.

④ ◦ On the **Document Alerts** page, designate the recipient of the alerts by clicking the check box next to each name

② **Customer: State of Independence**
Created: 06/05/2006 By: Ann Roos Hayner Modified: 09/23/2013 By: Mary Leigh Jensen

General

Name	State of Independence
Address	11128 John Galt Blvd Map (4)
City	Omaha
State / Postcode	Arkansas 71630
Country	United States of America (US)
County	Douglas
Phone / Extension	402-111-2222
Fax	402-123-4565
E-mail	dwmblek@essvote.com
Web site	www.essvote.com

Contacts All New

Mr.	ALERTS ALERTS - --
Ms.	Erin Amos - CSM
Ms.	Steph Berry - OE
Mr.	Jeb Cameron - CSM
Mr.	Glenn Foote - --
Ms.	Nikki Greguson - Customer Support Coordination Manager

Monitor

Items	Projects	Documents
③ Alerts	Election Status	Election Forms
Return & Repair Forms	Customer Files Upload	My Documents

Picture

Mktg/Addnl Info

Type / Since	Customer	06/05/2006
Status / Since	Active	10/28/2011
Security level	10	
Classification	Other	

Relations

Manager	Alexia C Scott Morrison (Employee)
Reseller	847 - Test Reseller
Parent account	
Subsidiaries	(1) Balance list

Activity

Read - Recent
Log: Application

Financial

Division	Election Systems & Software
Debtor code	123456838
Currency	USD - US Dollar
Credit line	USD 11,111.00
Payment condition	NET 90 DAYS
Shipping via	test ship via code
Sales order confirmation	No
Back order	✓
Partial delivery allowed	✓
Payee name	
Cost center	Customer Srvcs-Fulfilmnt
Accounts Receivable	Balance

④ **Document Alerts**
Customer : Cuyahoga County, Ohio

Alert

Alert for AutoMARK
Alert for DS200
Alert for ERM
Alert for Model 650
Alert for Unity

Subscribers

Save

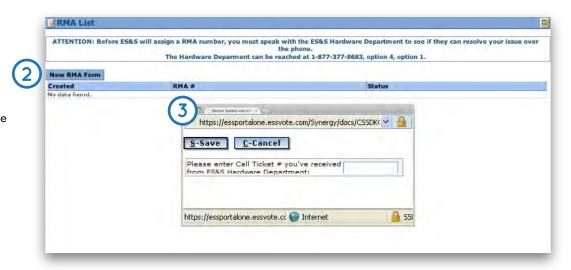|	Contact Name	Job Description	Email	Alerts?
1	Brian Cleary	Assistant Manager of Ballot Department	bcleary@cuyahogacounty.us	☐
2	Jane Platten	Director	jplatten@cuyahogacounty.us	☑
3	Marvin Davies III	Manager of Fiscal Services	mdavies@cuyahogacounty.us	☐
4	Patrick McAlea	Assistant Manager of Ballot Department	pmcalea@cuyahogacounty.us	☐
5	Patrick McDonald	Deputy Election Director	pmcdonald@cuyahogacounty.us	☐
6	Shachel Soeder	Manager of Ballot Department	ssoeder@cuyahogacounty.us	☐

Submit RMA Form

To begin the return material authorization (RMA) process, customers must speak with a certified hardware specialist from the ES&S Hardware Department. This provides an opportunity to resolve the issue over the phone. Call the Hardware Department Direct Line: 877.377.8683, option 4, then option 1
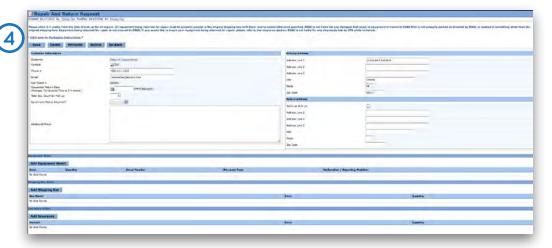

If the issue requires an RMA:

- ① · Click **Submit RMA Form** on the *myES&S* Cusotmer Portal homepage
- · **RMA List** page opens
- ② · Click [New RMA Form]
- ③ · Call **Ticket #** dialog box opens
- · Enter the call ticket number received from the call with the hardware specialist
  - ◦ Click [S-Save] to continue creating the RMA Form
  - ◦ Click [C-Cancel] to cancel creating the RMA Form
- · **Repair And Return Request** page opens
- · Complete the fields in Customer Information, Pick-up Address and Return Address
- ④ · Click [Save]

All equipment being returned for repair must be properly packed in the original shipping box with foam inserts unless otherwise specified. ES&S is not liable for any damages that occur to equipment in transit to ES&S that is not properly packed as directed by ES&S, or packed in something other than the original shipping box. Equipment being returned for repair is not insured by ES&S. If you would like to insure your equipment being returned for repair, please refer to the insurance section. ES&S is not liable for any shipments lost by UPS while in transit. For instructions, click **Click here for Packaging Instructions** on the current page. Please allow 3-4 weeks from the date of pickup for all repairs.
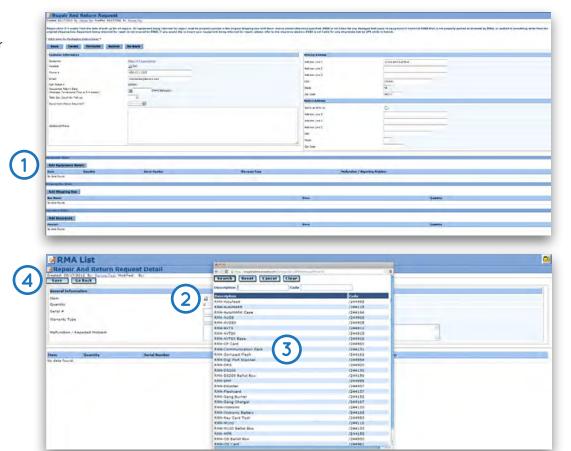
Submit RMA Forms

Repair And Return Request page expands to include: Equipment Detail, Shipping Box Order and Insurance Order

(1) • Click [Add Equipment Detail]

  (2) ◦ Click 🔍 to look up the item being sent into ES&S for repair

  (3) ◦ Select item

  ◦ Enter the item's serial number
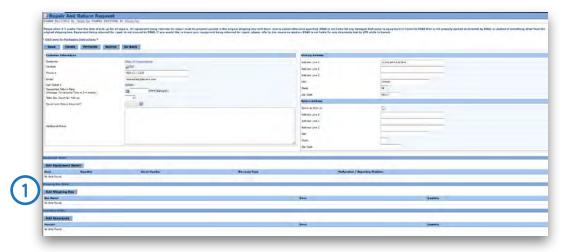
  Note: Not all items require serial numbers.

  ◦ Select warranty type from the dropdown list

  ◦ Enter description of the item's issues into "Malfunction/Reported Problem" field

  (4) ◦ Click [Save]. The information entered will be populated in a table below the fields

  ◦ To enter a second item for repair, repeat the steps above and click [Save]

  ◦ Click [Go Back] to return to **Repair and Return** page after completing equipment detail

Submit RMA Forms

① • Click [Add Shipping Box] under Shipping Box Order section
   ② ◦ Click 🔍 to look up the box model for RMA item
   ③ ◦ Select item
      ◦ Enter the quantity needed
   ④ ◦ Click [Save]
      ◦ By clicking Save, the request is saved and you are
        returned to the Repair and Return Request page

   Note: The only authorized shipping option for the M100
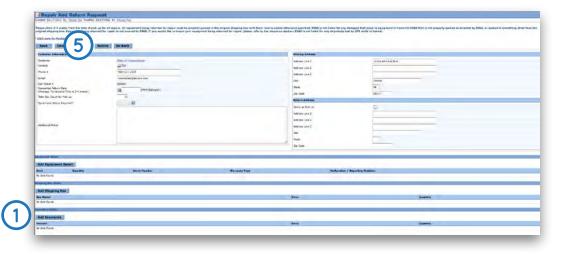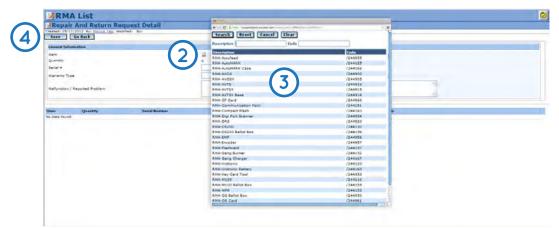   *is to ship it in the hard case.*

Submit RMA Forms

① • Click **Add Insurance**

  ② ◦ Click 🔍 to look up the item being sent for repair

  ③ ◦ Select item

  ◦ Enter the quantity of items requiring insurance

  ④ ◦ Click **Save**

  ◦ By clicking Save, the request is saved and you are returned to the **Repair And Return Request** page

*Note: Insurance is offered on select equipment and only to equipment that is packaged in the original custom shipping box with foam inserts. For instructions on how to properly package RMA, Click **Click here for Packaging Instructions**.   Listed cost covers round trip insurance for ONE unit. Insurance will only be applied to the shipment if you request and pay for it. All claims are subject to approval by ES&S. Approved claims will receive a like replacement unit.*

⑤ • Click **Submit** after the RMA form is complete and the request is ready for submission
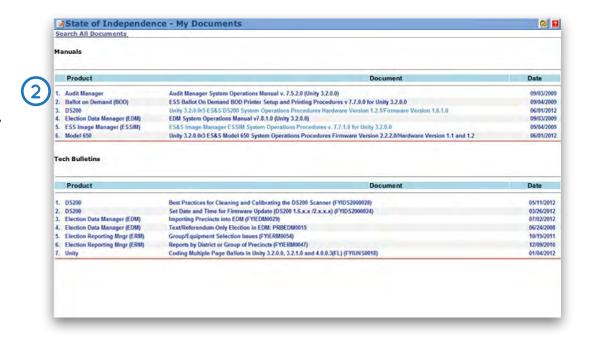
Find My Documents

ES&S is determined to keep customers up-to-date with the latest information notices and election news. To do this, documents about technical updates or product information can be found in the customer portal. This provides an easy outlet for customers to view data without emails about each time new information is available.

To Enter "Find My Documents":

- ① • Click **My Documents** on your *myES&S* Customer Portal home page
- • The **My Documents** page contains an alphabetized library of all User Manuals and Tech Bulletins that pertain to the equipment and software you use.
- ② • Click the document title to download the document view, print, and save.

It's just that easy!

Find My Documents

Manually Search for Specific Documents

(1) • On the **My Documents** page, click **Search All Documents**

• The **Find Documents** page will open

(2) • Click **Manuals** or **Tech Bulletins** to search based on the following

categories:

- Central Count Scanners
- Precinct Count Scanners
- Election Management Software
- Disability Devices
- Electronic Poll Books

• Products within the selected category are listed

• Select the product category

• A list of documents will be organized by post date

• Select the title of the document from the list

• Click **Download** to retrieve the document or click the title of the document to open it in the web browser

Perform Advanced Searches for Documents

(3) • Click "Advance Search" to enter more specific information (e.g., Date) to narrow the search

(4) • After entering the information, click **Search**

• To furhter narrow the search, enter keywords into the field and click Search

• Click **Reset** to remove secondary searches and return to the original search