

eCounting 2022 – Q&As

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COUNTDOWN TO LOCAL GOVERNMENT ELECTION ON 5 MAY 2022

Project Status Update: Summary

PROJECT GOVERNANCE

- The Project is proceeding well and everything that should be in place at this point is already delivered or on track.
- Bulletins which are sent to the Council User Group are available on the EMB website at [eCounting Bulletins 2022](#)
- The EMB met on Thursday 28 October 2021 and a subsequent email was sent to Councils on Thursday 4 November 2021 attaching a letter from the Convener of the EMB, Directions and the Print timetable available at [link](#). As required by legislation the Directions have been the subject of formal consultation with the EMB, which includes both ROs and EROs, and with the Electoral Commission. The final Directions reflect comments from those consultations.

QUESTIONS AND ANSWERS

eCount - Questions and Answers

EasyPrint

Q. What do I use EasyPrint for?

- A. EasyPrint is an online portal which allows users to order and proof all election materials. Some Councils will already be Idox customers and be familiar with EasyPrint and others will not. EasyPrint training has been ongoing for the month of December to ensure your Council details, data uploads, proofing of print materials all runs smoothly.

Q. What is the naming convention for Ballot Boxes within eCount for 2022?

- A. To distinguish between Station and Postal boxes it has been agreed to prepopulate all station boxes with the word 'Box' and all postal boxes with the prefix 'PV'. The key benefits of this are that station and postal boxes will be immediately distinguishable to observers and it will also enable the automated production of national results broken down into polling station and postal votes.

To ensure all Councils conform to this, Idox's Easyprint will prepopulate all station boxes with 'Box' and all postal boxes with 'PV' this will ensure the National Results Data can be collated (see National Results section of this Q&A).

Q. How do I get labels for Ballot Paper Trays and Ballot Paper Accounts?

- A. Labels are produced from the data you provide to Idox for all ballot boxes. Idox produce the labels and they are stored on EasyPrint. You can print these labels as many times as you wish for whatever purpose you would find them useful, however, a label should be attached to each ballot paper account tray and the Ballot Paper Accounts. Advice on this, from the Ballot Paper Account Working Group supported by the User Group, is detailed in the eCount Process section of this Q&A.

Q. What size of labels should I order for printing the barcode labels for trays and the Ballot Paper Accounts?

- A. Please order AVERY L7173-100 – 10 per sheet.

Printing for the Election

Q. What's the timetable for the various print items?

- A. The timetable was circulated to the User Group on 9 November 2021 and a copy of the [Print Timetable](#) is available on the EMB website.

Q. What are the arrangements for print materials for those who are not currently Idox customers?

- A. The Idox team are currently working with contractors and customers to ensure appropriate arrangement are in place. More information on this will follow shortly.

Q. What are the arrangements for print inspection?

- A. The print inspection options are:
- Visit to the Printer
 - Live Inspection Box – costs previously provided
- Quality Control Checklists emailed to User Group on 25.1.22

eCount Team

Q. What are the roles for eCounting?

- A. **Registration/Verification Operator** – To register each tray and then verify the number of ballot papers scanned matches the number of ballot papers registered.
- Scanning Operator** – Scan ballot papers for processing by the eCounting system
- Marshal** – moves ballot paper trays from awaiting scanning racking to Scanning Operators and then to scanning complete racking.
- Scanning Supervisor** - Will solve any issues at a scanning station and will be required to use their credentials in order for scanning to continue when the issue has been resolved.
- 1st Level Adjudicator** – To adjudicate on ballot papers which cannot be processed by the system. Acceptance only or defer to RO adjudication.
- RO Adjudicator** – Adjudicate on ballot papers which cannot be processed by the system and 1st level adjudicators.
- Count Centre Manager** – responsible for operational delivery of the electronic Count, escalation management and direct interface with the RO/DRO.
- RO/DRO** - responsible for the overall election, has the final decision on doubtful Ballot Papers, ensures the Count is administered in accordance with the rules and declares the results or they may appoint one (or more) of their team to act as a Depute Returning Officer.

Q. How many Operators should there be at each Workstation?

- A. This varies from Council to Council, however, the following is recommended as a minimum:
- Registration/Verification - 2 per workstation – one for keying and the other for checking
 - Scanning Operators – one per workstation
 - Scanning Supervisors – one for small Councils and two for larger Councils
 - 1st Level Adjudicators/RO Adjudicators – one per workstation, some Councils opt for two Adjudicators per workstation – one for keying and the other for checking.
 - Count Centre Manager – one as a minimum, more for larger Councils. This role can be undertaken by the Returning Officer, their Depute or Election Manager/Co-ordinator/Officer – usually someone who is key to the election team with knowledge of the poll, postal votes and Count arrangements.

eCount Training

Q. What have been/are the training/familiarisation opportunities for eCounting Teams?

- A. There have been/are a number of training opportunities provided as follows:

- Software changes demonstrations (online) – August/September 2021
- Drop-In Sessions – September 2021
- End to End Count Demonstration (online) – September 2021
- Performance Testing – November 2021
- eCounting System Videos are available at <https://vimeo.com/showcase/9004620> (password is available from your User Group member). The videos must not be made publicly available.
- eLearning for Roles – January 2022 - Link to eLearning and password for eLearning emailed to ROs and User Group on 18.1.22.
- Face to Face Training scheduled for:
 - ✓ P&J Live, Aberdeen – Monday 14 February – Friday 18 February 2022
 - ✓ Silvan House, Edinburgh – Monday 21 February – Friday 25 March 2022
 - ✓ Lagoon Leisure Centre, Paisley – Thursday 24 February – Friday 11 March 2022Training Manuals will be made available to Councils shortly, and these should be used to support knowledge following your training session.
- Familiarisation Session at Council Count Venues – Wednesday 4 May 2022

Q. Can eCount staff who don't have a Council email address access eLearning?

A. Yes. eLearning has been set up to allow anyone on your eCount team who has the link and the password (which obviously is only shared with your eCount Team) to access eLearning. The reason we had asked for Council emails to be used was so that users could be tracked for what they are accessing and we could automatically group this per council using the email address. However, any user will be able to access with any email, if they don't have a Council email. To allow us to track users we will use the completed 'Councils allocation and staff details' workbook (sent to the User Group on 11 January 2022). This workbook will allow us to reconcile all private email addresses with the appropriate Council for reporting purposes, but we don't need this in advance of them accessing eLearning.

Q. Are there training materials available following the Face to Face eCount Training?

A. Yes, training materials are available using the links below, please share these links with your wider eCount Team.

[F2F presentations](#)

[Manuals \(PDFs\)](#)

Count Centre Venues and Equipment

Q. What arrangements need to be in place in preparation for the eCounting system set up and removal of equipment?

A. The following should be in place:

- Count Venue Availability – the set-up of the eCounting system will commence at 9am on Monday 2 May 2022. Councils must ensure that power, tables, chairs and racking are available by 9am on Monday 2 May 2022.

- End of Election – we expect that in almost all circumstances the eCounting equipment will be removed from the premises by 10pm on Friday 6 May 2022. Council are asked to ensure their premises are available until that time.
- Contingency days – You should consider whether to include any addition/ contingency days in your booking in case of unforeseen delays or where it is unlikely your eCounting equipment can be removed by 10pm.
- Delivery of equipment – an appropriate delivery schedule for your equipment should be discussed and agreed with your Regional Manager
- Count Centre Security – as a general rule, we would advise that your Count venue should have one of the following security arrangements in place for the whole of Count week when the Count venue is unoccupied:
 - ✓ A monitored CCTV/intruder alarm system; or
 - ✓ An external security guard presence/patrols; or
 - ✓ Internal security guard/patrols.
- Please advise the Project Team or your Regional Manager if these requirements cannot be met and we will aim to agree a practical alternative with you.
- Additional Equipment – where a Council has agreed to provide their own additional equipment e.g. large screens, these should be in place in the Count Venue on Monday 2 May 2022.

Q. What power needs to be in place at Count Venues?

- A. It is the responsibility of each Council to ensure that power supplies are sufficient to support your Count. Your Regional Manager will provide support to work out the power requirements for the eCounting system. If you have any concerns about power, please let your Regional Manager or the Project team know.

Q. What do Councils need to provide for eCounting?

- A. Councils provide the following:
- Venue for the count
 - Operator staff
 - Power to each of the workstations
 - Tables
 - Any table covers necessary
 - Chairs
 - Trays for ballot papers (one per ballot box with barcode labels on them)
 - Racking to store ballot papers (One set for awaiting scanning. Another set for scanning complete)
 - Signage for trays and desks
 - Ballot Paper Account folder(s)
 - Scotch Removable tape
 - Paper for printer

Q. How much paper will be provided by Fujitsu?

- A. There will be one kit box per Count Centre which will contain 2 reams of A4 paper, one ream for each printer supplied. (**Note:** some Councils have 2 or 3 Count Centres and will receive a kit box for each Count Centre.)

Q. Is there a recommended supplier for the ballot paper trays?

- A. There is not a recommended supplier for the ballot paper trays. The trays used at Silvan House were purchased from <https://www.kbins.com/> (Normal – L40cm*W20cm and Larger L60cm*W40cm), however, there are many other suppliers of these types of trays.
- Q. Can the Postal Vote Management System be in the same location as the eCount set up?**
- A. Yes. There is no problem in principal with setting up PVMS/doing opening sessions in the same hall that the count centre is located in, so long as the 2 activities can be fitted into the space. We suggest that rope/tape barriers or similar should be used to separate the Count area from the PVMS area wherever possible. But please bear in mind that candidates and agents may be present at PVMS opening sessions, so they need to be kept away from the count centre itself.
- Q. Can a Polling Place be run in the same building at the Count Venue?**
- A. Yes. However, if you have a Polling Place in your Count Venue you must ensure separate entrance/exits are in the place with tight security at the count venue and no permissible access from the Polling Place to the Count Venue.

eCount Process - General

- Q. What are the agreed recommendations by the User Group for dealing with Ballot Paper Accounts at the eCount?**
- A. The User Group supported the Ballot Paper Account Working Group's recommendations which were as follows:
- A full set of Ballot Paper Accounts should sit with Registration/Verification Operators in addition to any other copies of the Ballot Paper Account at the Count venue.
 - Returning Officers to choose how they record their discrepancies and ensure discrepancies are available to the Registration/Verification Operator.
 - A copy of Ballot Paper Account should be placed in Ballot Paper Trays as per arrangements for eCounting in 2017.
 - The Returning Officer's team are responsible for ensuring barcodes are on the Ballot Paper Accounts in the Folder for Registration/Verification (and also on the Ballot Paper Trays).
 - Checking Barcodes - in terms of checking the barcodes are accurate, whether this is from the label or from the Ballot Paper Accounts the process is the same as it has always been i.e. you can scan the barcode in notepad or excel (if you have a handheld scanner) and the information will be displayed OR if you use Idox PVMS this check can be done at that point using the Idox equipment OR on the week of the poll once your eCount is set up the labels can be checked at that point.
 - Note that barcode labels are available from Easyprint for download and printing from Monday 4 April 2022.
 - Printing barcodes on documents – if you wish to print your barcode directly onto your Ballot Paper Account the following may be of assistance to you:
 - ✓ Good tutorial here with a link to download the font - https://www.majorgeeks.com/content/page/barcode_word.html

- ✓ Alternative download link - <https://www.barcodesinc.com/free-barcode-font/>
- ✓ Online Code39 barcode generator - <https://www.barcodesinc.com/generator/index.php>
- Registration/Verification Operators should be provided with as much poll and count info as possible and is helpful.

Q. Is there a way to use the scanner glass light to check for marks/dirt?

A. No. The Scanners we are using do not have that feature.

Q. What happens in the event of a re-count?

A. In the event of a re-count the system needs fully cleared down, and the count for that ward would need to start again from Registration. A factsheet explaining the process which can be shared with candidates and agents if required will be available in due course.

Q. What Factsheets have been produced so far?

- A. The following 3 factsheets have been produced and are available for the SLGE 2022 on the EMB website at <https://www.emb.scot/downloads/download/160/scottish-local-government-elections-2022>
- **eCounting Overview and STV Factsheets** - These general 'Factsheets' have been produced in a way to share with anyone with an interest in eCounting.
 - **eCount Reports Factsheet** – This Factsheet will assist all RO teams with the agreed process. Information about report production is included in the Q&A document but the factsheet supports this in more detail.

Q. What documents will be in the Count Centre folder?

- A. Some of the documents in the Count Centre folder will include:
- eCount Reports Factsheet (including Preference by Ballot Box merge doc)
 - Tied Votes
 - Re-Counts
 - Process/Task List for system recover for Fujitsu Team

Q. How will the eCount Centre Information Pack assist ROs?

A. The purpose of this pack is to equip ROs with some answers/actions to issues which arise infrequently eg tied votes, requests for re-counts, recovering/restarting a contest and also remind ROs of the Count Reports (including how to merge the Preference by Ballot Box report).

eCount Process - Users

Q. What do I need to do to get my eCounting Team set up as Users?

A. All staff who require to access the Idox eCounting software to perform a role need to have a smartcard allocated to them. Idox have created a User account request facility in EasyPrint that makes it very easy for Councils to input the name of each person a smartcard needs allocated to against a particular role. This will save Councils from

having to compile lists of staff and give these to the Fujitsu teams in Count week and should also make the staff enrolment session during Count week much easier. Idox will provide the staff/roles lists for all 32 Councils to the central support team who will in turn distribute these to each of the Count Centre set-up teams.

Q. What steps do I need to take if I have more than one Count Centre (Glasgow, Fife, Edinburgh only)?

A. In the user guide it details how the sites with more than one count centre can add additional sites as you need to add the users for each site.

Q. What is the deadline for setting up Users?

A. You have from **now until 4pm on 22 April 2022** to set-up your users in EasyPrint. All staff lists will be exported from EasyPrint on the evening of the 22 April and sent to the central support hub for processing.

Q. What are the User Type (Roles) options in Easyprint?

A. The User types you can select from are as follows:

Council Count Centre Manager – you can only have one person with this User type. This person is the only one who can authorise the verification of ballot boxes which have a discrepancy of +20 or -20 or have zero ballot papers. They can also access the Count (for private preview by the RO/DRO), Management screens, Reports and the RO App.

Manager – If you have additional Management roles with a need for access to the Count, Management screens, Reports and the RO App, select this User type. Please do not use this role for any person who will be using an outward facing or dual screen. We strongly recommend limiting the number of Manager Users, including the CCM, to no more than 3 per Count Centre to minimise the risk of more than one person going through the same Count at the same time and to limit access to the RO App.

RO Adjudication – Select this User type for your RO, DRO or other person who will operate the workstation for the purpose of going through the public facing RO adjudication. RO adjudication and request ballot paper are the only Idox software functions which this User type will be able to access as a default. Please note that in the training more functions were available at the RO Adjudication workstation but for the live Counts we have separated the public facing activities like RO Adjudication from the internal/private activities such as going through the Count in private or using the RO App to preview the RO adjudication queue. This is to ensure that internal/private information is not accidentally displayed to observers and will align with your Count layouts and intended workstation purposes.

Adjudication – Select this User type for all Adjudication staff who will require to use a workstation to undertake adjudication. These users have access to Adjudication and to the request ballot paper function.

RegVerify - Select this User type for all Registration and Verification staff who will require to use a workstation to undertake their role. These Users have access to all Registration and Verification functions as well as to Reports and the Management tab and can generate and print verification related reports. Please note that in training these users had access to the RO App but will not have access to this at the live Count.

Scanning Supervisor – This User type is for supervisors who may require to log onto a scanning workstation to resolve scanning issues. They will be issued with a scannable barcode which can be used to access a scanner in the event of e.g. a paper jam.

Scanner – This User type is for scanning operators and only gives access to the scanning function.

Display Only – This User type provides access only for the purpose of setting up/changing the public facing information that is displayed – First preference and Count Progress for the contests you wish to display. You can choose to set Display Users up with e.g. User 1, User 2 etc instead of a person's name. The PIN for Display only smartcards can be shared if required. The number of Users you require should be the same as the number of Large Display screens you have, including for any RO Display screens which are being used to display Count Progress when RO adjudication is not taking place.

Supplier Manager – this is a Fujitsu role and you do not need to complete this.

Admin – this is a Fujitsu role and you do not need to complete this.

Q. What if I don't know everyone's name by 22 April 2022?

A. If you know you need a role to be filled but you do not know who by, you should simply select the relevant User profile in EasyPrint and enter the name as e.g. Manager 01, or Adjudicator 03. This will enable your Count Centre Team to set up a smartcard and account and the person who will take on that role can provide their name to the Team at the enrolment session.

Q. Should I add people as Users if they are contingency staff?

A. If you plan to have a few contingency staff attending your Count in case they are needed as substitutes you should add them to your user list. For example, you might wish to re-deploy some of your ballot box opening staff to eCounting roles when they have finished ballot box opening tasks. At the enrolment session in Count week, any person who is replacing a member of Count staff already named in your User list should inform the Fujitsu Count Team and the original name can be changed to the substitute's name.

Q. Is there a limit on the number of Users or on the number in each Role?

A. Yes, there are limits on certain roles for security and audit reasons. The following Manager roles have restrictions:

- **Count Centre Manager:** This person has special system permissions which allow them to verify ballot boxes which have a discrepancy of +20 or -20 against what

has been registered or to verify that a box has zero ballot papers. Only one person can be given this role. This is because the Idox software is set up to allow only one person to have those specific authorisation permissions. In addition, the Count Centre Manager role can access these functions: Count, Management (internal view of Count progress), Reports and the RO App.

- **Manager:** This role will have access to the Count (for private preview by the RO/DRO), Management, Reports and the RO App, the same access as the CCM. We strongly recommend limiting the number of Manager Users, including the CCM, to no more than 3 per Count Centre, because:
 - These Users can access the Count for the purpose of going through the results in private with the RO/DRO. Care must be taken to ensure that more than one Manager does not access the same Count at the same time.
 - All Manager Users can access the RO App. Access to the RO App should be very limited for privacy reasons. The RO App should only be used on workstations where observers cannot see it and must never be used on a workstation with an outwards facing/public display screen.

eCount Process: RO Preview App

Q. How can the RO privately preview ballot papers requiring RO adjudication?

- A. Returning Officer Application – All RO users will have access to a browser which provides them with the functionality to preview/inspect all the ballots in the RO queue on a contest by contest basis. This is a viewer only and no actions can be taken in it. ROs will need to go through all doubtful ballot papers in their queue using the eCounting system as normal.

eCount Reports – please also see the Reports Factsheet

Q. What reports do I have to publish once the Count is completed?

- A. The reports that require to be published as soon as possible after completion of all Contests, as directed by the EMB, are:

- Candidate Votes Per Stage
- Declaration of Results
- Preference Profile (.blt file)
- Transfers
- First Preference
- Preference Summary

Q. When does the Preference by Ballot Box report get published and what needs done with it before publishing?

- A. The report will be available in a separate 'Preference by Ballot Box' zipped folder in the portable drive containing all your eCount data. There are a few steps which must be carried out as follows:
- The folder contains a .csv file for each contest.
 - This folder must be uploaded to easyprint (a user guide is available on EasyPrint which will provide step by step instructions for this). Print Controllers will be in

touch to provide online training/demo on how to merge the information in this report. **Note:** Your team member(s) may need their credentials created for Easyprint.

- Each contest report must be checked to ensure that any ballot boxes which are under 200 ballot papers are highlighted they must be merged with another ballot box.
- When all contests have been checked and merged if required you will export the reports from Easyprint and publish them with all the other reports required to be published for each contest.
- Detailed instructions on how to do merging will be provided.

This Report must be published within 7 days of the election.

Q. How do I access the Preference Profile report which is a .blt file?

A. Open the .blt file in 'notepad'.

Q. Which reports are run before the start of the eCount?

- A. Before the start of the eCount, confirmation is given by the Count Centre Manager to the Fujitsu Technical Engineer to run the following 2 reports from the management workstation:
- System Readiness Report
 - Master Clear Down Report

These reports will be printed and passed to the RO.

Q. Which reports are run during the eCount (on demand)?

- A. During the eCount you (Registration/Verification Operators) can generate the following 3 reports for each contest:
- Registration report
 - Percentage Turnout report
 - Reconciliation report

These reports can be printed.

Q. Which reports are run at the end of each contest (after all pre-count checks are successful and the Count has been run)?

- A. On completion of each contest, the RO/Count Centre Manager will request the Fujitsu Manager to run the pre-count checks in private, on the management workstation. The Count tab will be enabled when the Pre-Count completes successfully, and the RO can then run the Count. The RO/Count Centre Manager should instruct the Fujitsu Manager how many copies of each report they require to be printed to hand out to Candidates, Agents and other Observers:
- Candidate Votes per Stage (pdf)
 - Declaration of Results (pdf) (Note: *EMB Direction 11 – read first page only and second page for electronic or printed versions only*).

As soon as each Contest is declared, PDF copies of these reports will be transferred onto an unencrypted USB device (unless an alternative arrangement for your Count

has been agreed, such as emailing the reports to a nominated member of Council staff) which will be handed to the agreed Council Official and can be used for publication. A separate USB will be used for every Contest and you do not need to return these devices.

Q. Which reports are run at the end of election (ie all contests have been completed and declared)?

A. When **all** contests have been completed and declared, the Fujitsu Technical Engineer will prepare a full suite of eCount reports. These reports will be saved onto 2 separate encrypted portable devices which will be passed to the RO (or DRO) for the Council's use/retention. Again, you do not need to return these devices.

The reports will be grouped into the following folder structure:

- Reports-For-Publication
- Preference-By-Ballot-Box-Easyprint-Upload (zipped)
- Reports-For-Council-Use-Only
- All-Contests-reports-for-council-use-only
- National-Results (zipped)

Q. How long does it take to run the end of election reports?

A. In most cases, the full set of reports will be available for Councils, on their portable drives, within 1 hour of the Election being completed.

Candidates and Agents

Q. Will candidates and their agents get an opportunity to review the e-counting system before the actual elections?

A. Yes. In each of the Count Centres there will be a Candidates and Agents demonstration of eCounting on Wednesday of election week (i.e. 4 May 2022). However, if you feel that any of your prospective candidates might like an earlier opportunity to see the eCount system and are willing to come to Edinburgh, we will be arranging 1 or 2 demo days in Silvan House during the training period in February/March, subject to demand being sufficient. We will provide further information on general demo days in due course.

National Results

Q. In 2017 each Council had to complete and submit a data collection form to Scottish Government for the purposes of collating National Results - will Councils be required to do this again in 2022?

A. The information requested in 2017 i.e. candidate, turnout, party affiliation, postal voting, etc will now be taken directly from the Results Reports by Fujitsu staff once your election is complete, so you will no longer be required to do anything after your election to support the collation of National Results. The new naming convention for ballot boxes is key to enabling the publication of National level data on postal voting (see Easyprint Section of this Q&A). Once all elections have been completed the National Results data will be published to the EMB website.

Payment to Fujitsu for eCounting

Q. What are the payment arrangements for eCounting?

- A. Councils are responsible for payment all elements of print and this will be invoiced directly by Fujitsu to each individual Council based on order quantities. Contract print prices were advised in an email to the User Group on Friday 10 September 2021 to allow Councils to forecast costs for printing.

Q. When will Fujitsu invoice me?

- A. Fujitsu will invoice each council on conclusion of the election in May 2022 for all print material.

Q. I don't have Fujitsu as a supplier on my system – what do I need to do?

- A. Speak to your Regional Manager who can help you (with support from the Fujitsu Project Management Office team) complete your supplier form with all the relevant details. Fujitsu is currently working through adding all Councils as Customers and will check the details held to make sure this is correct before adding you to the system.