NATIONAL EBALLOTING- QUICK START GUIDE

This "quick start guide" covers the main features of the National eBalloting to help you get started.

Note that a full *User guide* explaining all of the features of the application. References to the full *User guide* are shown on the top right hand corner of each page in this document.

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For further questions and assistance on the National eBalloting, please contact the ISOlutions at helpdesk@iso.org.

Benefit:

Simpler consensus building, better voting performance, increased efficiency

The National eBalloting is a voting tool which manages two kind of national ballots:
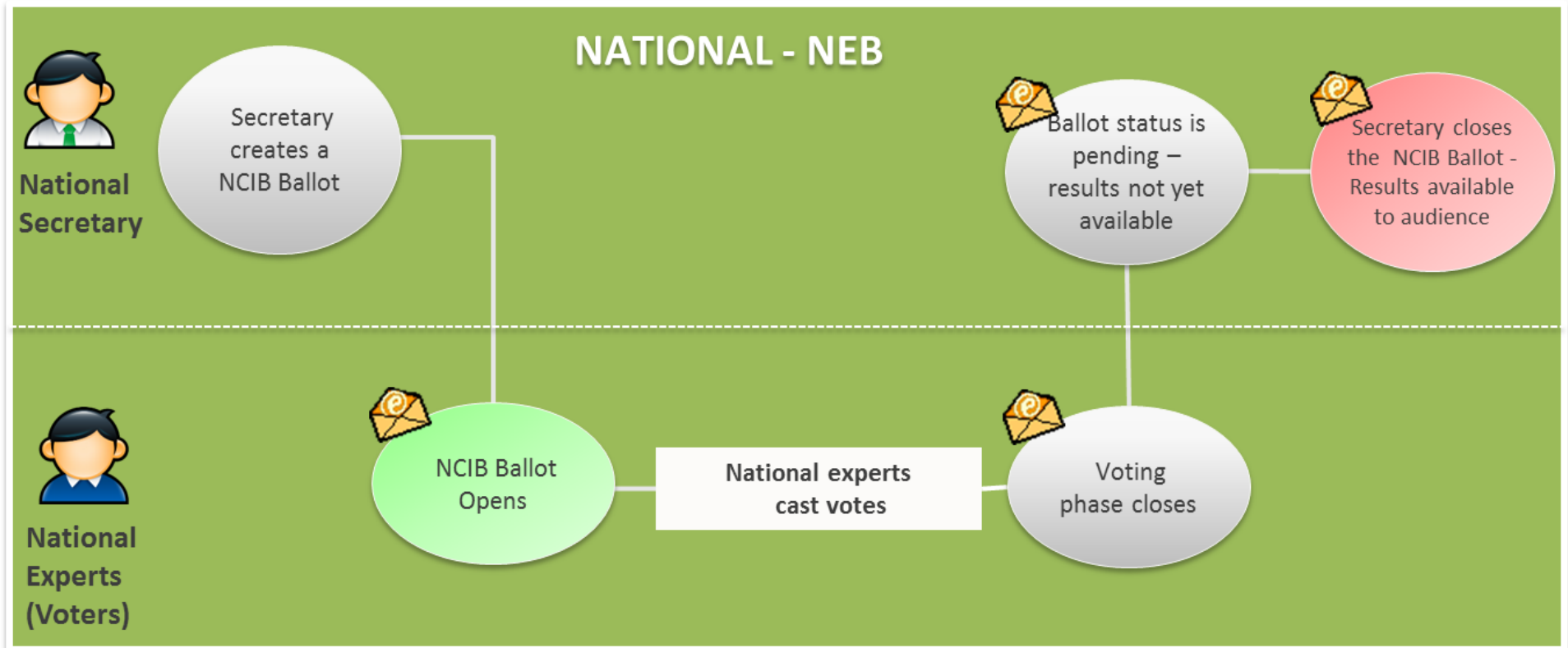

1. **National Committee Internal Ballot (NCIB)**

   Aim: Voting on national standards

2. **National Positioning Ballot (NPOS)**

   **Aim:** Gaining national consensus before voting on an international or regional standard.

It provides information about ISO and/or CEN ballots relevant to each national committee.

Summary of Key features:

- ✓ Ballots created manually by Secretaries of national committees (NC)
- ✓ Possibility to create questionnaires with multiple questions and possible answers
- ✓ Possibility to upload documents for vote
- ✓ Possibility to use pre-defined templates
- ✓ Automatic notifications sent to the ballot audience
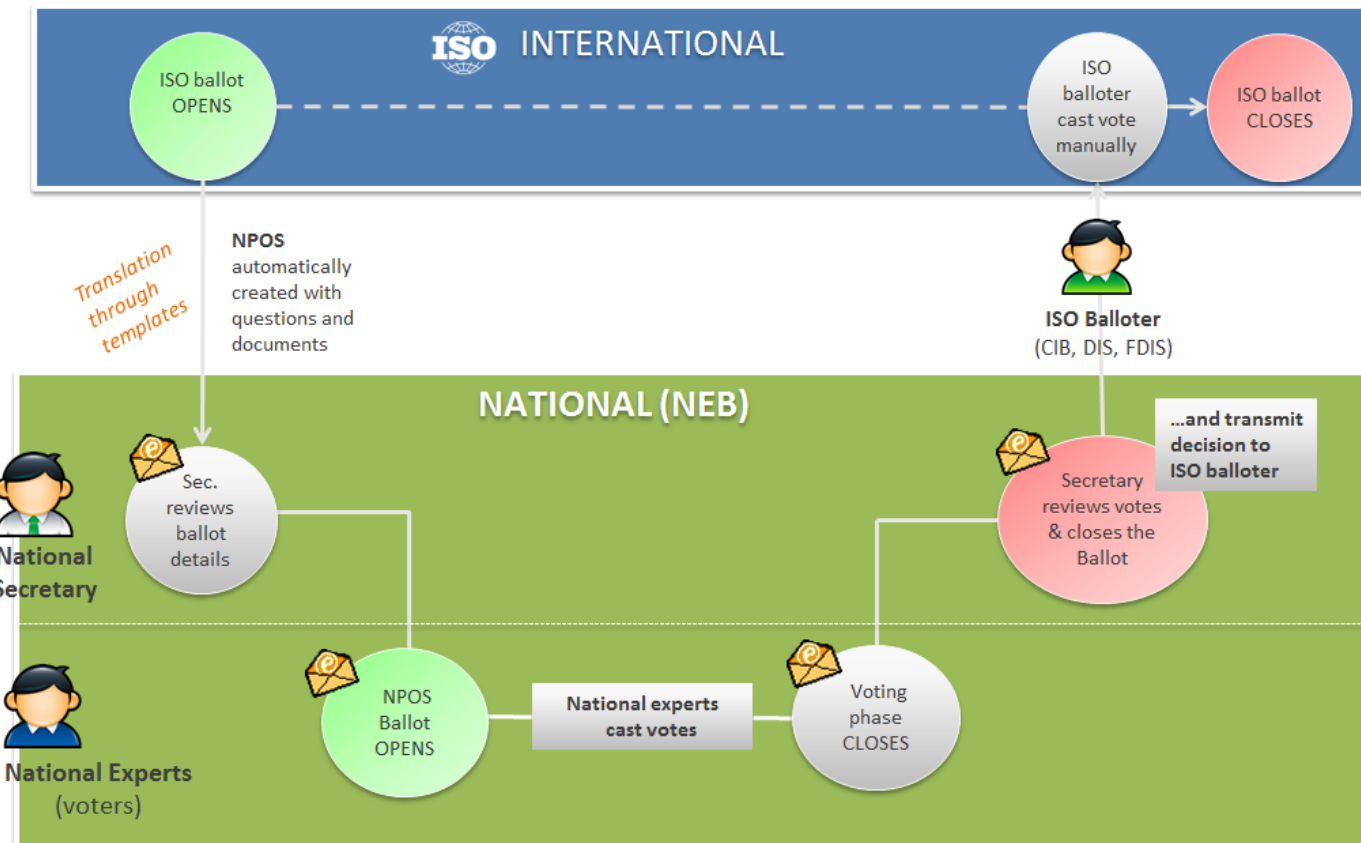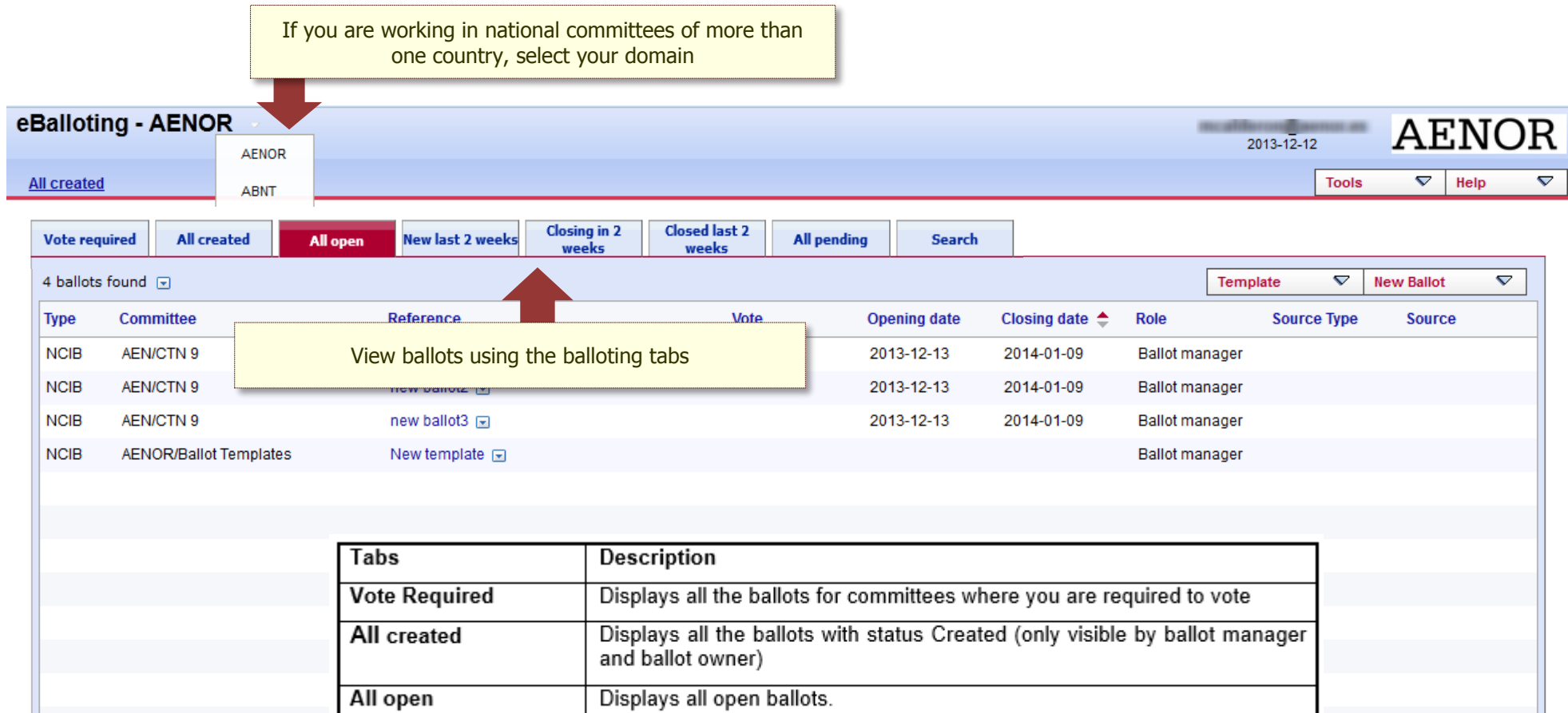
Summary of Key features:

- ✓ Mapping between national and international/regional committees is set in the Global Directory (via NMC)
- ✓ Manually or automatically create new ballots
- ✓ Questions and possible answers and reference documents of source ballot are automatically copied
- ✓ Possibility to use pre-defined ballot templates to translate international or regional English ballots into locale language
- ✓ Automatic notifications sent to the ballot audience

The **Home page** displays a list of all ballots, which you are allowed to view depending on the roles assigned in the ISO Global Directory.

If you are working in national committees of more than one country, select your domain

eBalloting - AENOR   AENOR
                                            2013-12-12

AENOR
ABNT

All created   Tools ▽   Help ▽

| Vote required | All created | All open | New last 2 weeks | Closing in 2 weeks | Closed last 2 weeks | All pending | Search |

4 ballots found ▾   Template ▽   New Ballot ▽

Type	Committee	Reference	Vote	Opening date	Closing date ⬍	Role	Source Type	Source
NCIB	AEN/CTN 9			2013-12-13	2014-01-09	Ballot manager		
NCIB	AEN/CTN 9	new ballot2 ▾		2013-12-13	2014-01-09	Ballot manager		
NCIB	AEN/CTN 9	new ballot3 ▾		2013-12-13	2014-01-09	Ballot manager		
NCIB	AENOR/Ballot Templates	New template ▾				Ballot manager		

View ballots using the balloting tabs

Tabs	Description
Vote Required	Displays all the ballots for committees where you are required to vote
All created	Displays all the ballots with status Created (only visible by ballot manager and ballot owner)
All open	Displays all open ballots.
New last 2 weeks	Displays all ballots which were opened within the last 2 weeks
Closing in 2 weeks	Displays all open ballots which will close during the next 2 weeks.
Closed last 2 weeks	Show all the ballots which closed during the last 2 weeks.
All pending	Displays all the ballots with status Pending (only visible by ballot manager and ballot owner)
Search	Opens the search screen which allows to search with user defined values

The **Ballot search screen** allows you to enter parameters into the search fields to find the ballots which match those criteria.

This functionality is useful for specific requests, e.g. to find all ballots of a particular committee, a ballot based on its reference number or ballots open or closed within time periods which are not covered by the predefined queries executed through the tabs.

Enter your **Search criteria** here and click **Search**

Search Fields	Explanation/Function of the fields
Type	**All** – Search for all ballot types (NCIB, NPOS (M) and NPOS(A))
	NCIB – National Committee Internal Ballots
	NPOS (M) – Manual National Positioning Ballots
	NPOS (A) – Automatic National Positioning Ballots
Status	Ballot status (created, open, pending, closed)
Ref/Title	Ballot reference number or document title element.
	Note: A search by reference or title is a free text search that matches in any part of the ballot reference number or the title (e.g. searching for "smit" will match "smith").
Committee	Only those national committees to which your profile is registered will be displayed.
Source ballot type	Search for NPOS ballots according to the source ballot type
Source committee	Search for NPOS ballots for a specific source committee (ISO/CEN)
Opening date	Specifies that the date in the range between "From" and "To" is an opening date
Closing date	Specifies that the date in the range between "From" and "To" is a closing date
From	Range Opening/Closing date
To	Range Closing/Closing date

From the **search screen**, click on the ballot reference to open the ballot details screen.

List of ballots

Click on the ballot reference name to open a specific ballot

The ballot contains tabs with the following information:

➢ **Information:** Lists of the ballot attributes, the reference documents or hyperlinks, questions an votes values
➢ **Participation:** Lists of ballot owners and votes.
➢ **Audience:** List the complete ballot audience.

Notes: The Participation and audience tabs are only visible by the Secretary and SST)

CREATE A BALLOT

User guide - sections 4.1, 4.2

STEP 1: Click on **Ballot** and select the type of ballot you want to create

⚠️ Ballot templates are managed by your National Member Body

STEP 2: Follow the 4-steps wizard to create your ballot

Committee selection > **Ballot Information** > **Questions & Answers** > **Reference Documents**

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The ballot metadata and reference documents and links can be modified as long as the ballot is not closed. The ballot questions and answers can only be modified when the ballot is in status Created

⚠️ No notifications are sent after a change has been made

AEN - National Positioning Ballot

secretary_test@
2012-10-19

All created > ISO 105-D01:1993/CD Amd 1   Tools ▽   Help ▽

Information	**Participation**	**Audience**

Reference: ISO 105-D01:1993/CD Amd 1 ▽

> To **modify the ballot information**, click on the function menu (▽) next to the ballot Reference

Committee: AEN/TC test 1
Status: Created
Opening date: 2012-10-21   **Closing date:** 2012-12-15

(Automatic National Positioning Ballot)

Title: Textiles -- Tests for colour fastness -- Part D01: Colour fastness to dry cleaning -- Amendment 1

Pending phase: yes

Ballot source information

Reference: ISO 105-D01:1993/CD Amd 1 - test if template doc are added to source ballot   **Type:** ISO/CD (Committee Draft (ISO))
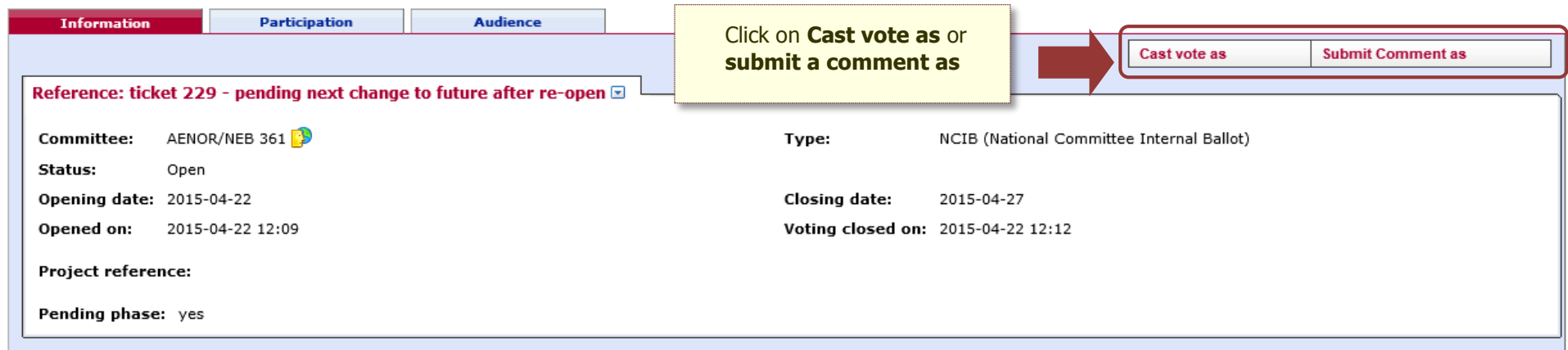**Committee:** ISO/TC 38/SC 1

Reference documents and links ▽

> To **modify the ballot documents**, click on the function menu (▽) next to the ballot Reference documents and links

📄 CIB ballot document ▽   📄 test1 ▽

Questions and answers ▽

> To **modify the ballot questionnaire**, click on the function menu (▽) next to the ballot questions and answers

No.	Questions	Possible Answers
1	¿Está de acuerdo con la distribución del proyecto como una DIS?	Si * No * Nos abstenemos

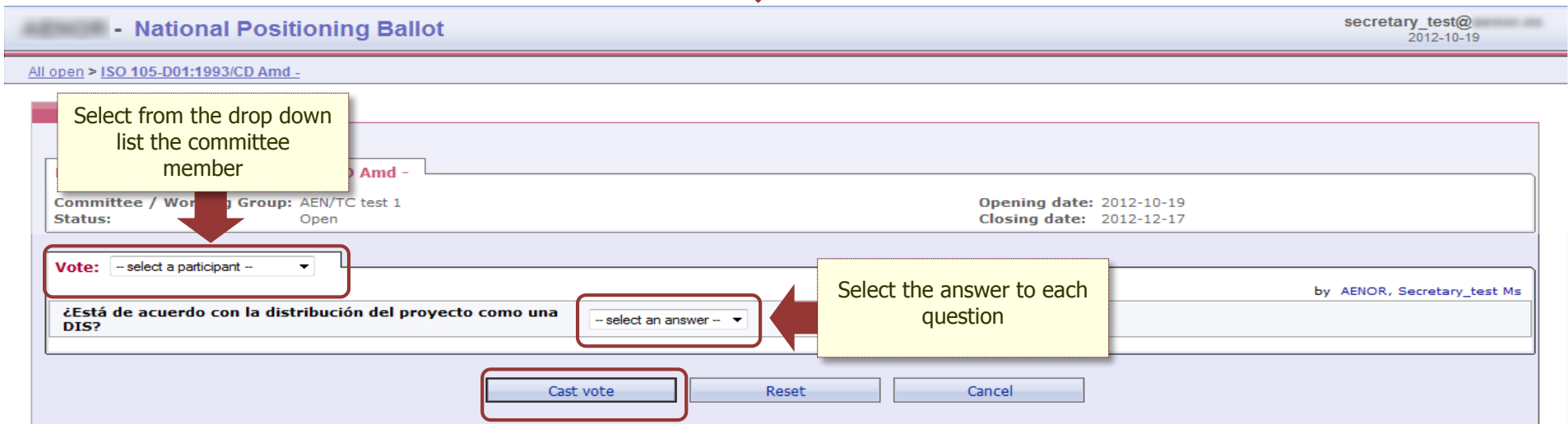(*) A Comment is required for this answer value.

[Back to list of ballots]

To cast a vote /submit a comment on behalf of a voter, open the ballot and click on **Cast a vote as** or **submit a comment as**

Information	Participation	Audience

Click on **Cast vote as** or **submit a comment as**

Cast vote as	Submit Comment as

Reference: ticket 229 - pending next change to future after re-open ▾

Committee:	AENOR/NEB 361	**Type:**	NCIB (National Committee Internal Ballot)
Status:	Open		
Opening date:	2015-04-22	**Closing date:**	2015-04-27
Opened on:	2015-04-22 12:09	**Voting closed on:**	2015-04-22 12:12

Project reference:

Pending phase: yes

- National Positioning Ballot

secretary_test@
2012-10-19

All open > ISO 105-D01:1993/CD Amd -

Select from the drop down list the committee member

Committee / Working Group: AEN/TC test 1	**Opening date:** 2012-10-19
Status: Open	**Closing date:** 2012-12-17

Vote: -- select a participant -- ▾

by AENOR, Secretary_test Ms

¿Está de acuerdo con la distribución del proyecto como una DIS? -- select an answer -- ▾

Select the answer to each question

Cast vote	Reset	Cancel

The Secretary or SST **approves/disapproves or abstain the ballot results manually** once the ballot has reached the pending phase or, if there is no pending phase, when the ballot is closed.

STEP 1: Open the ballot you wish to approve/disapprove:

OR

STEP 2: Go to the **Action** section at the bottom of the page and:

1. Select the ballot result approval as appropriate
2. Enter your explanation
3. Close the ballot
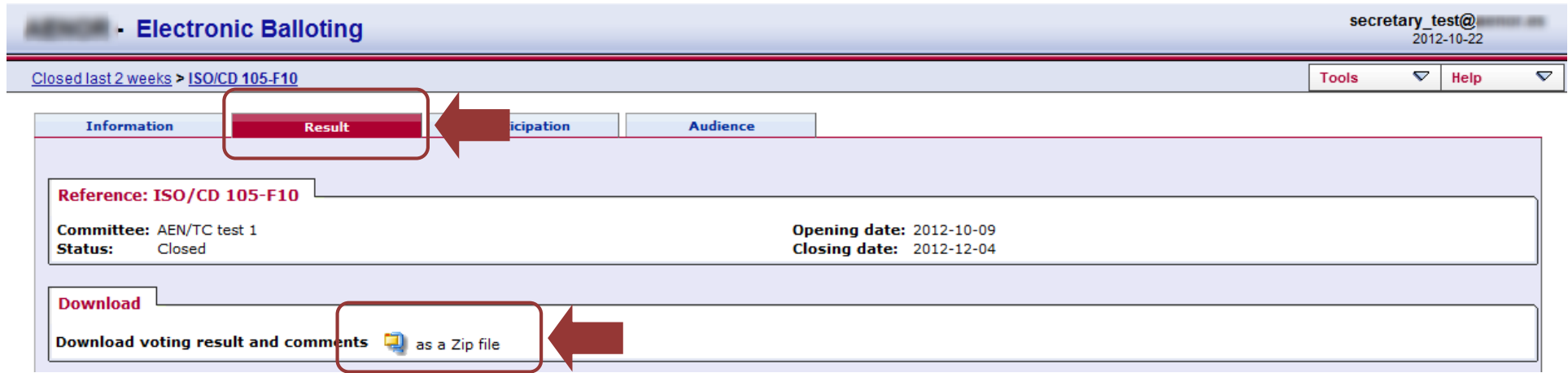
Open the closed ballot for which you wish to download the results.

In the **Result** tab, click on voting result and comments as a zip file (click on the Zip icon)

There are two cloning functionalities:

Simple Cloning

➢ Copy the ballot questionnaire only

Full Cloning

➢ Create an exact copy of the ballot. Copy the ballot reference, title, opening and closing date, project reference, pending phase, questionnaire and ballot documents.

STEP 1: Open the ballot you wish to clone and select **Clone this ballot** for simple cloning or **full cloning of this ballot**.

⚠️ Ballots can be cloned in any committees for which you are allowed to create ballots depending on the role assigned in the ISO Global Directory

STEP 2: Follow the 4-steps wizard to create your ballot