ISOlutions - National eBalloting

User guide for MBUA and Member Body Staff

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1 Introduction

This guide is aimed at Member Body User Administrators (MBUAs) and Member Body Staff whose responsibility is to manage ballot templates (NCIB and NPOS) for the NSB.

There are two different types of ballot templates:

National Committee Internal Ballot (NCIB) templates

- Used to create questionnaire templates for specific national ballot stages. (e.g national committee draft)
- Those templates are available to ballot owner in the "new ballot" drop down to create new ballots

National Positioning Ballot (NPOS) templates

- Used to automatically translate source ballot questionnaire.
- Those templates are not available to ballot owner in the "new ballot" drop down
- The templates are used automatically by the system when a specific ballot type is recognized

For further information on National eBalloting, including processes and how to navigate, search, create ballots etc… please refer to the National eBalloting User Guide for Secretaries.

1.1 Template ballot life-cycle

Ballot templates are created by the Ballot Manager (MBUA or NSB staff)

The template ballot life-cycle is as follow:
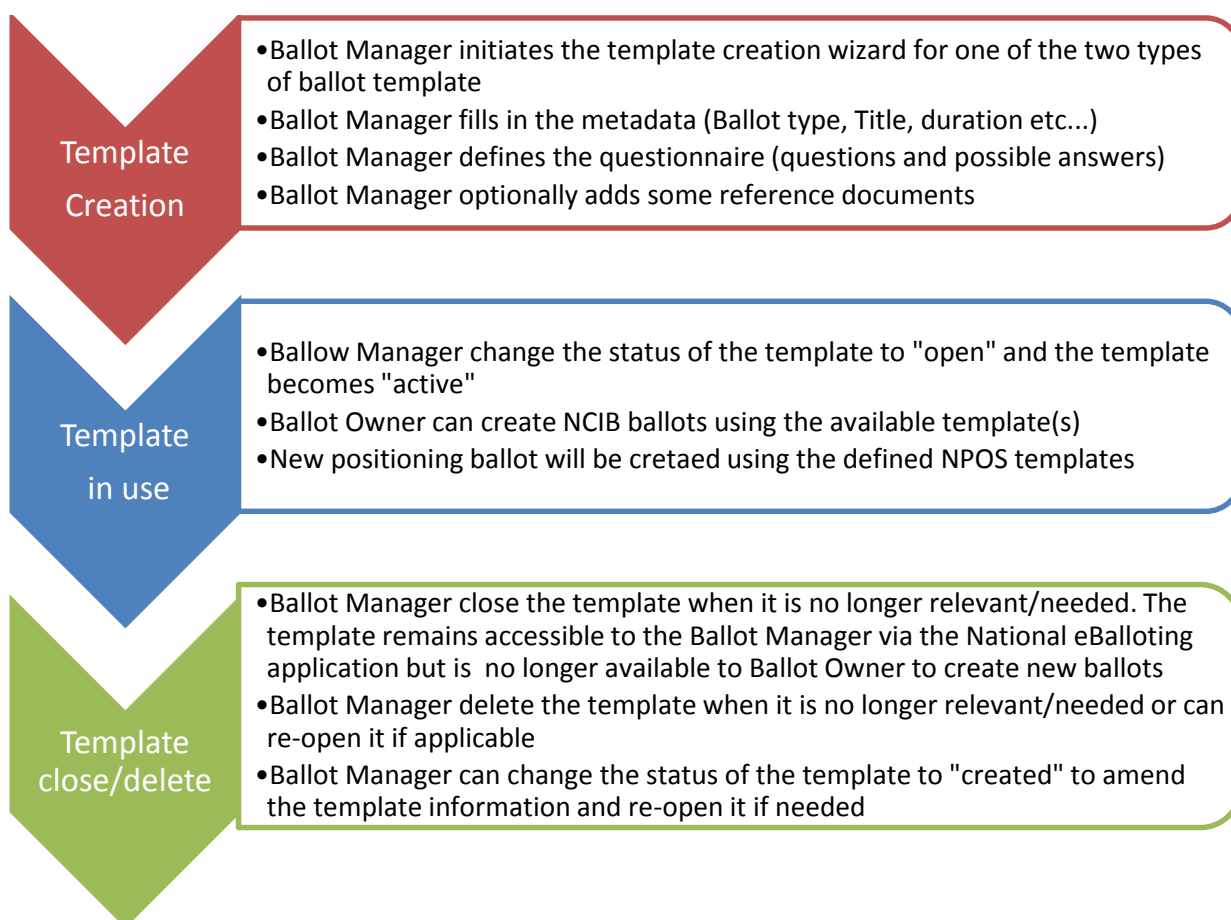
Template Creation
- Ballot Manager initiates the template creation wizard for one of the two types of ballot template
- Ballot Manager fills in the metadata (Ballot type, Title, duration etc...)
- Ballot Manager defines the questionnaire (questions and possible answers)
- Ballot Manager optionally adds some reference documents

Template in use
- Ballow Manager change the status of the template to "open" and the template becomes "active"
- Ballot Owner can create NCIB ballots using the available template(s)
- New positioning ballot will be cretaed using the defined NPOS templates

Template close/delete
- Ballot Manager close the template when it is no longer relevant/needed. The template remains accessible to the Ballot Manager via the National eBalloting application but is no longer available to Ballot Owner to create new ballots
- Ballot Manager delete the template when it is no longer relevant/needed or can re-open it if applicable
- Ballot Manager can change the status of the template to "created" to amend the template information and re-open it if needed

Figure 1 – Template ballot life-cycle

⚠️ *Currently the balloting application does not allow to manage different version for the same template. For example, it is not possible to have two templates for ISO/NP ballots*

2 Roles and Permissions

> *Users and their roles are registered and maintained by the Member Body User Administrators (MBUA) of the National Member Bodies in the ISO Global Directory.*

On various screens and explanations some terms are used in relation to roles in the balloting process with which you may not be familiar. The table below gives an overview and explanations of these terms and relates it to business functions in ISO.

Balloting roles	Permissions	Business role (Global directory)
Ballot Owner	Can create and modify ballots of the respective committee(s). Can cast vote/comment on behalf of any voters/comments Receive opening and closing notifications as well as notifications when a ballot is created and reaches the pending phase*	Secretary and Secretary Support Team
Ballot Manager	Has the same permissions of Ballot Owner but can also create NCIB and NPOS ballots templates. Receive notifications when a ballot is created and reaches the pending phase*	MBUA and Stand Process
Voter	Can vote on all ballots inside a particular national committee. Receive opening, reminder and closing notifications*	Committee member *The business role associated with this balloting role may differ from one National Member Body to the other according to individual settings*
Commenter	Can comment on all ballots inside a particular national committee. Receive opening, reminder and closing notifications*	*The business role associated with this balloting role may differ from one National Member Body to the other according to individual settings*
Ballot monitor	Cannot cast votes, nor submit comments. Can view all votes/comments on close ballots Receive opening and closing notifications*	Observer *The business role associated with this balloting role may differ from one National Member Body to the other according to individual settings*
Surveyor	Can see votes/comments casted by all committee members on open and close ballots but cannot cast a vote Receive opening and closing notifications *	Chair *The business role associated with this balloting role may differ from one National Member Body to the other according to individual settings*

Table 1 - Balloting roles

* Notifications setting may be different from one National Member Body to the other according to individual settings

2.1 Assign a role of Member Body Staff in GD

The MBUA can assign users that he/she administer in the Global Directory as "Member Body Staff". Member Body Staff have the same permission as MBUAs in the National eBalloting application.

To assign a role of Member Body Staff to a user in GD you simply need to create an organisation called "NSB stand process" (for example AENOR stand process) and assign the user as employee of this organisation.

For more details on how to create an organisation and how to assign role to users in GD please refer to the GD3 – Guide for User Administrators

3 Setting up automatic positioning ballot

The National Positioning (NPOS) aims at gaining national consensus before voting on an international or regional standard. There are two types of NPOS:

Manual Positioning Ballot (NPOS (M))

- Ballots are created manually by the Secretary or SST

Automatic Positioning Ballot (NPOS (A))

- Ballots are created automatically in the National eBalloting platform when an ISO / CEN ballot opens

National positioning ballot (NPOS) can only be created for ballots of active ISO/CEN committees that are mapped to the national committee (NTC) in the Global Directory. This mapping is maintained by the Ballot Manager (MBUA)

> ⚠️ ***Automatic National Positioning Ballot - NPOS(A)***
> *Automatic National Positioning is only possible if the mapping of the ISO/CEN committee to the national committee has been set in the Global Directory with the option **"With automatic positioning".***
>
> *For further information on editing committee mapping please view the GD3 – Full Guide for User Administrators - page 66*

> ℹ️ *National Positioning Ballot (NPOS) is available for the following ballot types:*
>
> ***ISO ballots:*** *NP, CD, DTR, DTS, DCOR, CIB ad Hoc, DIS, FDIS and SR*
>
> ***CEN ballots:*** *CIB ad Hoc, CIB-9mth Tol, CIB-ActivPWI, CIB-ADOPPWI, CIB-NWI, Enquiry, FV/UAP and SR*

4 Searching for existing templates

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.

To initiate a search, click on **Search** after having entered the search parameters. To clear the screen and remove search parameters, click on **Reset**.

Figure 2 -Search functionalities

Search criteria
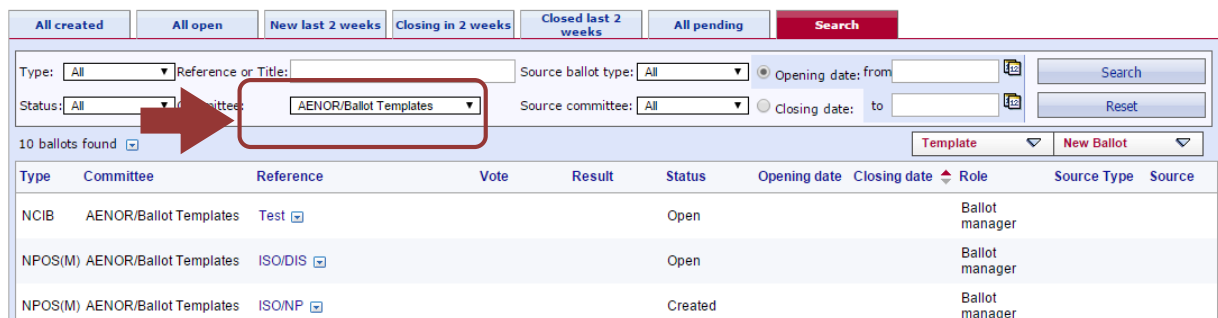
Enter your search criteria here and click "Search"

The Search screen allows to enter or to select parameters in the following search fields:

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

Table 2 -Search parameters

To view all templates select the committee "NSB/Ballot template" and click on **Search**

Figure 3 -Search for templates

All ballot templates are created in a committee called "NSB name/Ballot template"

5 Creating Ballot templates

5.1 Template for National Committee Internal Ballot (NCIB)

In the **National Committee Internal Ballot** section, click on **Template** and in the drop-down menu that appears select **National Committee Internal Ballot**
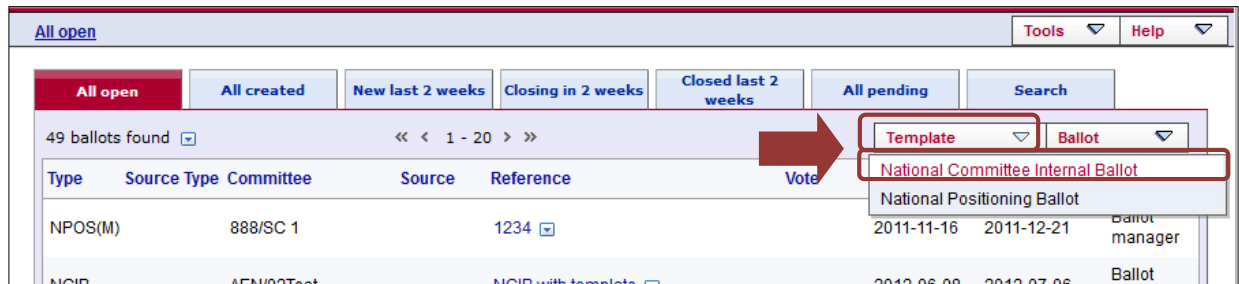
Figure 4 -Create a New template for National Committee Internal ballots (NCIB)

This will launch a 4-step wizard that will help you create the NCIB ballot.
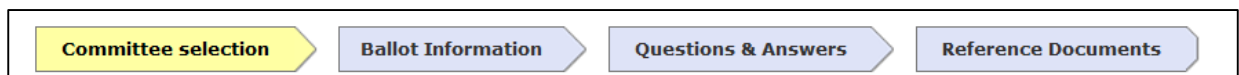
Figure 5 - 4-step wizard

Step 1 – Template Wizzard

The template is automatically created in the fake committee "**NSB/Ballot Templates**" and therefore you do not need to select any committee at this stage

Click the **Next** button at the bottom of the page to move to Step 2.

Step 2 – Ballot information

This step allows you to enter the template metadata. Fill in all the required fields:

Figure 6 – Ballot information

Fields	Description
Ballot type	The type of NCIB ballot (e.g. CD, NP, etc…)
Title	The title of the template. This is the title that will be shown to ballot owner when creating a new ballot
Pending phase	Tick to create by default a pending phase before closure of the ballot. The ballot will not close automatically
Default ballot duration	The default duration for a ballot using this template. Can be defined in years, Months, Weeks or Days. Ballot owner can amend as necessary at the ballot creation
Notes	Any notes relevant to the ballot.

Table 3– Ballot information description

Click the **Next** button.

Step 3 – Questions & Answers

In this step, you will define the set of questions and answers for the template

- ❖ **Define questions**
  - ▪ Define the question in the textbox.

Figure 7 - Define question

- ❖ **Define answers**
  - ▪ Define a possible answer in the textbox. (1)
  - ▪ For each answer, you can select if no **comment** is allowed, if a comment is compulsory by selecting one of the option in the drop-down list at the right of the answer. (2)
  - ▪ To add another answer, click on the **Add Answer** button. (3)
  - ▪ To delete an answer, open the function menu ( ) of the corresponding answer and select **Delete**.
  - ▪ To move an answer up or down in the list of answers, open the function menu ( ) of the corresponding answer and select **Up** or **Down**.

Figure 8 - Define Answers
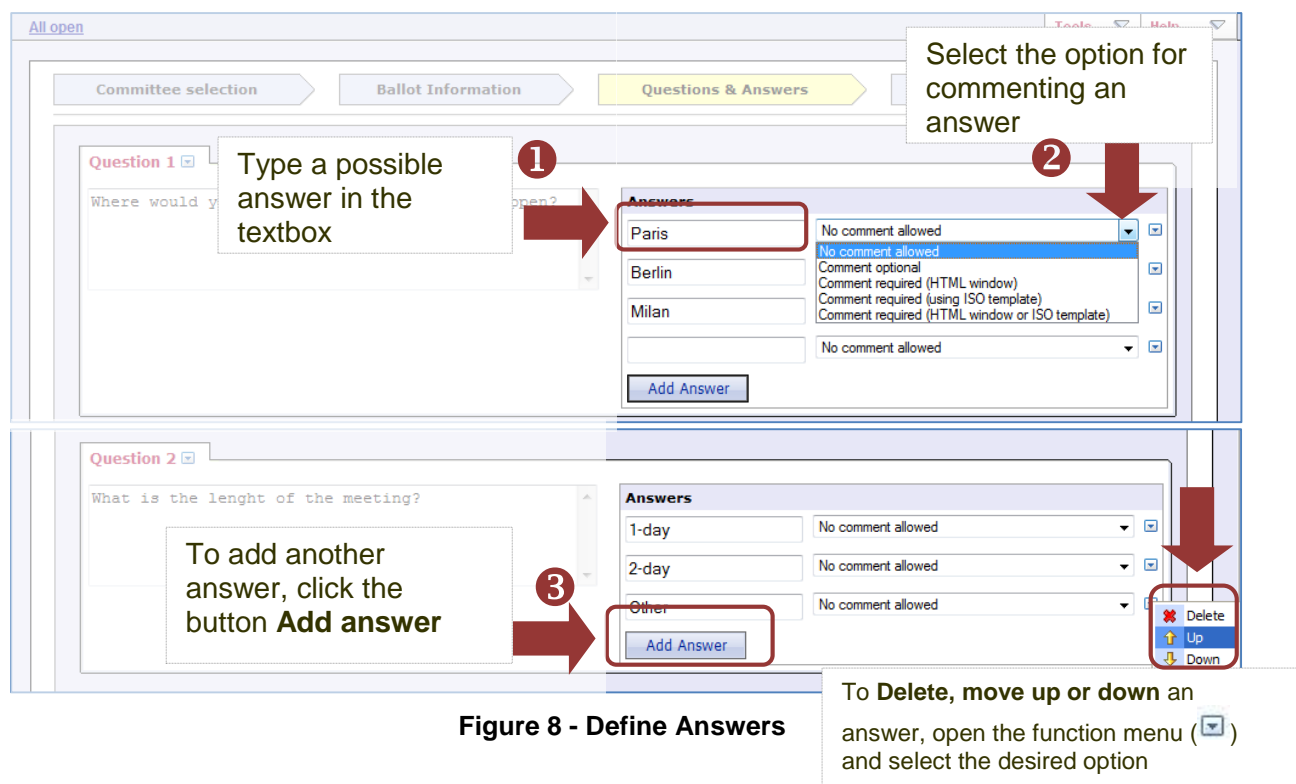
Some information about the different types of comment options available:

Comment options	Description
No comment allowed	Voter cannot add comment on selected answer
Comment optional	Voter can add comment on selected answer. Comment option include HTML window and/or document upload
Comment required (HTML window)	Voter must add a comment to selected answer. Comment option include HTML window only
Comment required (using commenting template)	Voter must add a comment using an commenting template. Comment option include document upload only
Comment required (HTML window or ISO template)	Voter must add a comment using an ISO template. Comment option include document upload and HTML window

Table 4- Comment field options

❖ **Add more questions**
- To add a new question, click on **Add question**
- To delete a question, open the function menu (⬇) of the corresponding question and select **Delete**.
- To move up or down a question in the list of questions, open the function menu (⬇) of the corresponding question and select **Up** or **Down**.
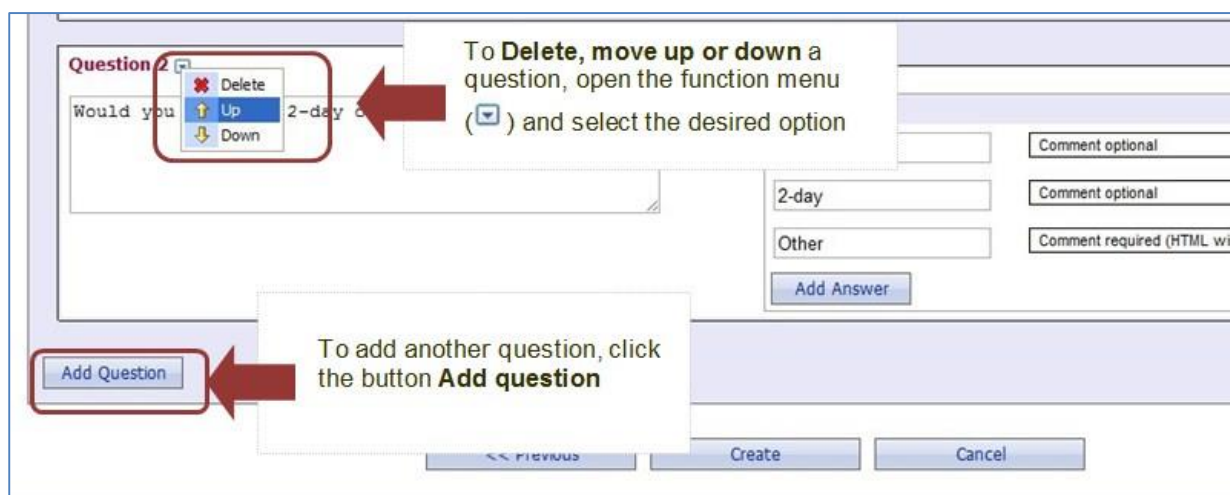
Figure 9 - Add more questions

Once ready, click the **Create** button. The ballot creation is confirmed by a pop-up window as soon as you clicked **Create.**
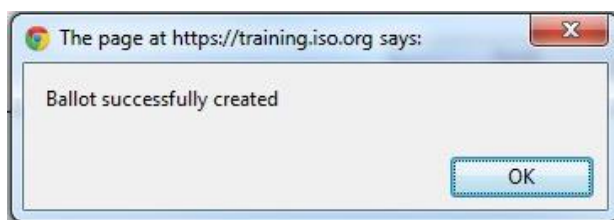
Step 4 – Reference documents

This step allows you to link to the template any reference document(s).

> The Secretary/SST will also be able to add more documents to the ballot if required

Open the function menu (▼) next to **Reference document and links** and select one of the three options: **Add new reference document, Add new reference document from Livelink** or **Add new link**.

Uploading options	Description
Add new reference document	Add a document that is on your computer
Add new reference document from Livelink	Add a document from the National eCommittee (NTC)
Add new link	Add a link

Table 5- Add more questions

– Add new reference document:

Allows you to add a new document to the ballot from your desktop

❖   select the option **Add new reference document**

❖ select a file by clicking on the "Browse" button and click Upload

Figure 10 - Add new reference document

– Add new reference document from Livelink

To attach a document from Livelink, do as follows:

❖ select the option **Add new reference document from Livelink**

Figure 11 - Add new reference document from Livelink

❖ Browse the NTC library to select the documents to be uploaded and click on **Load**

Figure 12 – Browse NTC library

– Add new link

To add a link, do as follows:

❖ select the option **Add new link**
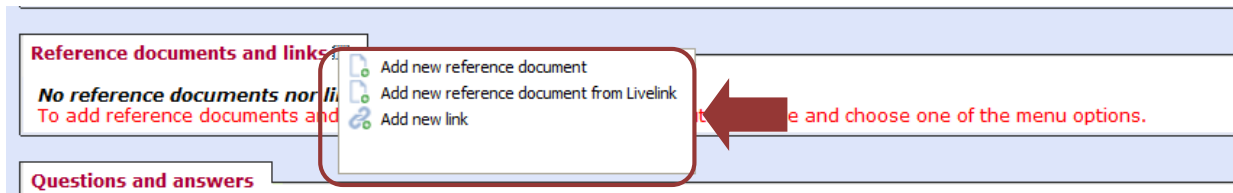
Figure 13 - Add new link

❖ Give a name to the URL and paste the link into the URL field

Figure 14 - Add URL Reference

❖ Click on **Submit**.

The NCIB ballot has been successfully created, with the reference document and will open automatically on the defined Opening date.

Click on the **Finish** button to terminate the wizard. The NCIB template has been successfully created. You need to open the template manually to make it available to Ballot owner.

> *While the ballot is in status **created** you can change all the information of the template, including the questionnaire.*
>
> *Once a template is **open**, you can modify the template metadata and reference document if needed but the amendments will only affect ballots that will be created in the future. All ballots already created, using the template, will not be modified.*

5.2 Template for National Positioning (NPOS)

In the **National Positioning ballot** section, click on **Template** and in the drop-down menu that appears select **National Positioning Ballot.**
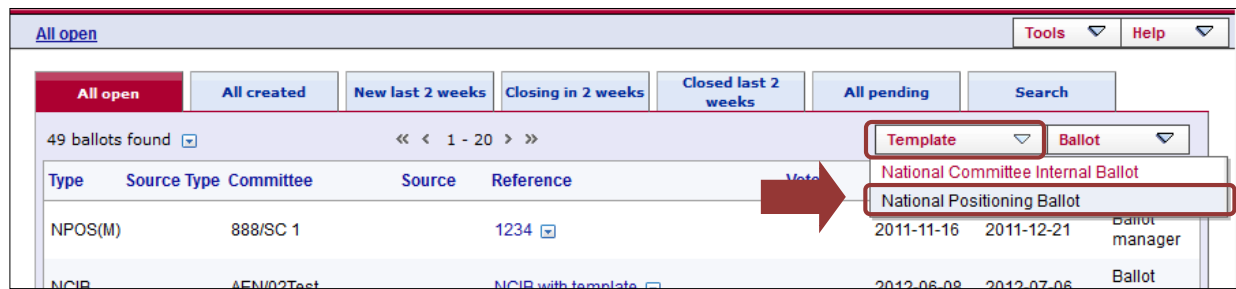
Figure 15 -Create a National Positioning template

This will launch a 4-step wizard that will help you create the NCIB ballot.
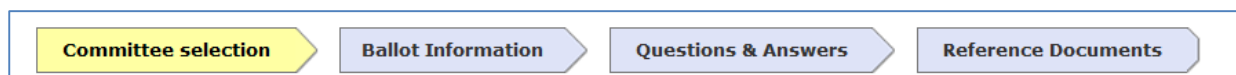
Figure 16 - 4-step wizard

Step 1 - Template Wizzard

The template is automatically created in the fake committee "**NSB /Ballot Templates**" and therefore you do not need to select any committee at this stage

Step 2 - Ballot information

This step allows you to enter the template metadata. Fill in all the required fields.

Figure 17 –Ballot information

Fields	Description
Ballot type	Select the source ballot type to which the template will be associated. For example, if you select ISO/DIS, the system will use the template each time a NPOS ballot is created for an ISO DIS source ballot
Title	This is a description of the ballot you are creating- this information will not show in the ballot
Pending phase	Tick to create by default a pending phase before closure of the ballot. The ballot will not close automatically
Open date delay	Positive delay in days according to source ballot opening date
Close date delay	Negative delay in days according to source ballot closing date
Notes	Any notes relevant to the ballot.

Table 6–Ballot information description

Click the **Next** button.

Step 3 – Questions & Answers

This step allows you to define the questions and answers for the template

> If the ballot template is found/used at NPOS(M) and NPOS(A) ballot creation, the template questionnaire will be used instead of the source ballot questionnaire.

❖ **Define questions**
- Define the question in the textbox.
- To add another question, click on the **Add Question** button.
- To delete a question, open the function menu ( ) of the corresponding question and select **Delete**.
- To move up or down a question in the list of questions, open the function menu ( ) of the corresponding question and select **Up** or **Down**.

Figure 18 –Define questions

❖ **Define answers**
  ▪ Define a possible answer in the textbox.
  ▪ To add another answer, click on the **Add Answer** button.
  ▪ For each answer, you can select if no **comment** is allowed, if a comment is compulsory by selecting one of the option in the drop-down list at the right of the answer.

  ▪ To delete an answer, open the function menu (▾) of the corresponding question and select **Delete**.

  ▪ To move an answer up or down in the list of answers, open the function menu (▾) of the corresponding answer and select **Up** or **Down**.

Figure 19 –Define answers

Once ready, click the **Create** button. The ballot creation is confirmed by a pop-up window as soon as you clicked **Create.**

Step 4 - Reference documents

This step allows you to link to the ballot its reference document(s).

> If the ballot template is found/used at NPOS(M) and NPOS(A) ballot creation, the template reference document will be merged with the source ballot reference document.

Open the function menu ( ) next to **Reference document and links** and select one of the three options: **Add new reference document, Add new reference document from Livelink** or **Add new link**.

Uploading options	Description
Add new reference document	Add a document that is on your computer
Add new reference document from Livelink	Add a document from the National eCommittee (NTC)
Add new link	Add a link

Table 7- Add more questions

– Add new reference document:

Allows you to add a new document to the ballot from your desktop

- ❖ select the option **Add new reference document**
- ❖ select a file by clicking on the "Browse" button and click Upload
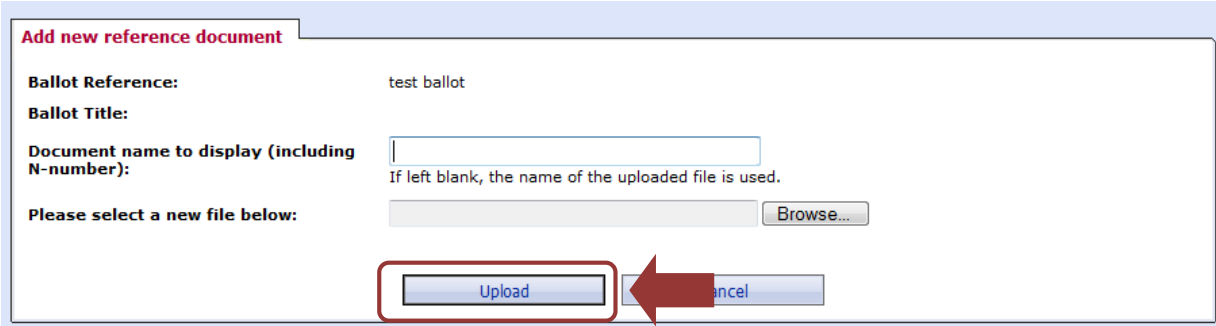
Figure 20 - Add new reference document

– Add new reference document from Livelink

To attach a document from Livelink, do as follows:

- ❖ select the option **Add new reference document from Livelink**
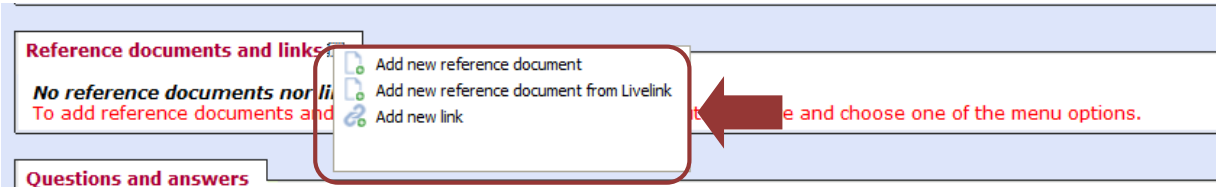
Figure 21 - Add new reference document from Livelink

❖ Browse the NTC library to select the documents to be uploaded and click on **Load**

Figure 22 – Browse NTC library

– Add new link

To add a link, do as follows:

❖ select the option **Add new link**

Figure 23 - Add new link

❖ Give a name to the URL and paste the link into the URL field

Figure 24 - Add URL Reference

❖ Click on **Submit**.

The NPOS template has been successfully created. You need to open the template manually to make it available to Ballot owner

6 Editing existing Templates

Existing templates can be modified by the ballot manager.

> Once a template is open, you can modify the template metadata and reference document if needed but the amendments will only affect ballots that will be created in the future. All ballots already created, using the template, will not be modified.
>
> To amend the template questionnaire you need to change the template status to **Created.**

6.1 Modify template metadata

To update template metadata, i.e. ballot reference, title, opening date, and closing date, click on the function menu (little blue arrow) next to Reference and select **Edit.**

Figure 25 - Editing template information

Modify any of the template information as appropriate and click Submit to finish editing:

Update the information as appropriate and click on Submit

Figure 26 - Update ballot metadata

6.1.1 Modify template status

Below is the list of status for the template and its explanation:

Ballot Status	Explanation	Visibility of the template
Created	The template has been created by the ballot manager (MBUA). All elements of the template (metadata, reference documents and questionnaire) can be modified	Template is visible to Ballot Manager only
Open	The template has been opened by the ballot manager and is now available for the ballot owner to use to create new ballots The template metadata and reference documents can be modified	**Ballot Owner:** Template is available to create new ballots **Ballot Manager**: the same, plus can amend the template if required
Closed	The template has been closed by the ballot manager. The template is no longer available to ballot owner to create new ballots. A closed template can be re-opened at any time by the ballot manager	Template is visible to Ballot Manager only

Table 8– Template Status

6.2 Modify attached files

To update reference documents and links, click on the function menu (little blue arrow) next to Reference documents and links and select one of two options:

Figure 27 - Update Reference documents and links

Add new reference document:

Allows you to add a new document to the ballot from your desktop

- ❖ select the option **Add new reference document**
- ❖ select a file by clicking on the "Browse" button and click Upload

Figure 28 - Add new reference document

– Add new reference document from Livelink

To attach a document from Livelink, do as follows:

❖ select the option **Add new reference document from Livelink**

Figure 29 - Add new reference document from Livelink

❖ Browse the NTC library to select the documents to be uploaded and click on **Load**

Figure 30 – Browse NTC library

– Add new link

To add a link, do as follows:

❖ select the option **Add new link**
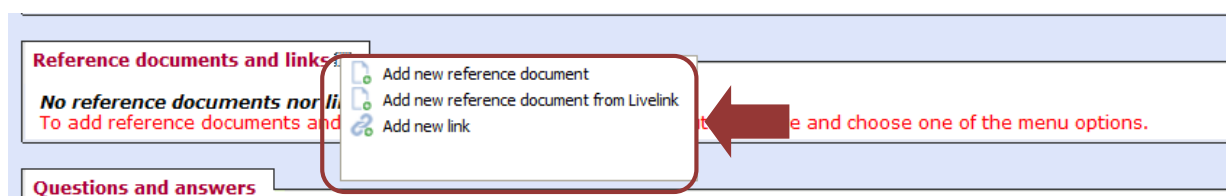
Figure 31 - Add new link

❖ Give a name to the URL and paste the link into the URL field

Figure 32 - Add URL Reference

❖ Click on **Submit**.

.

6.3 Modify the template questionnaire

To update the questionnaire of a template you first need to change the status of the ballot to **Created**. To do this, click on the function menu (little blue arrow) next to Reference and select **Edit.**
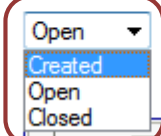
Figure 33 - Editing template information

Change the status to **Created** and click on **Submit**

Figure 34 - Editing template status

click on the function menu (little blue arrow) next to Questions and answers and click on **Edit.**

Figure 35 - Edit Questions and answers

For detailed instructions on how to edit questions and answers, please refer to step 3 in the above 4.1 and 4.2 sections.

6.4 Delete a template

To delete a template, click on the function menu next to the template and select **Delete.**

Figure 36 – Delete a ballot

Once deleted, the template will no longer be available in the National eBalloting application.

7 Helpdesk information

For further questions and assistance when creating template in the national eBalloting application and managing users and National committees in the ISO or CEN Global Directories, please contact the ISO Helpdesk at helpdesk@iso.org.

The MBUA team is responsible for the first level helpdesk support for national experts and secretaries and should therefore provide them a single point of contact with a least an email address.