ISOlutions - National eBalloting

User guide for Secretaries and support team

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1 Introduction

1.1 Definitions and Workflow

1.1.1 National Committee Internal Balloting (NCIB)

National Committee Internal Ballots (NCIB) are created by the National secretaries and/or national secretaries support team (SST) to gather votes on national projects. The NCIB balloting process are characterized by the following main stages:
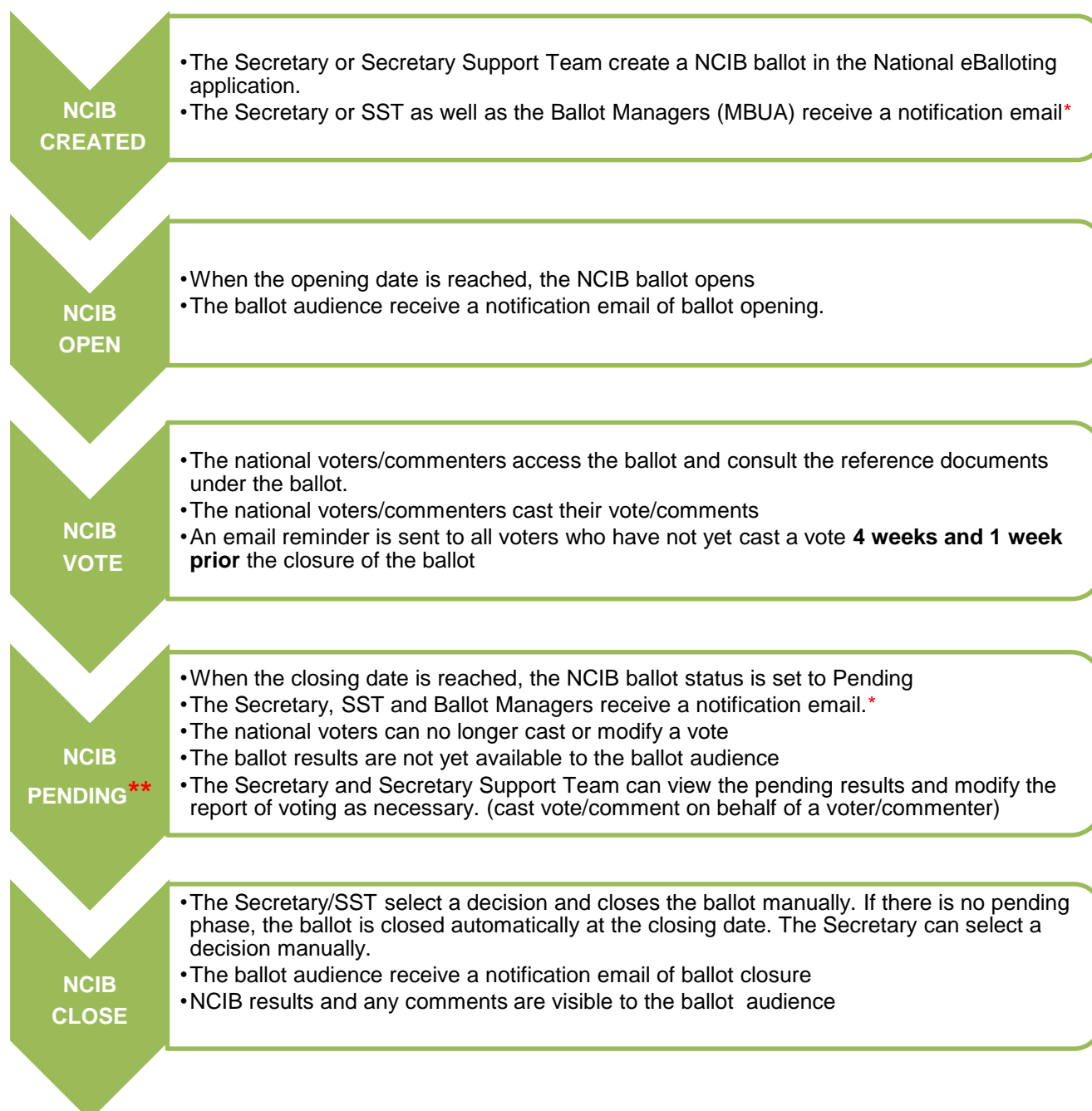
NCIB CREATED
- The Secretary or Secretary Support Team create a NCIB ballot in the National eBalloting application.
- The Secretary or SST as well as the Ballot Managers (MBUA) receive a notification email*

NCIB OPEN
- When the opening date is reached, the NCIB ballot opens
- The ballot audience receive a notification email of ballot opening.

NCIB VOTE
- The national voters/commenters access the ballot and consult the reference documents under the ballot.
- The national voters/commenters cast their vote/comments
- An email reminder is sent to all voters who have not yet cast a vote **4 weeks and 1 week prior** the closure of the ballot

NCIB PENDING**
- When the closing date is reached, the NCIB ballot status is set to Pending
- The Secretary, SST and Ballot Managers receive a notification email.*
- The national voters can no longer cast or modify a vote
- The ballot results are not yet available to the ballot audience
- The Secretary and Secretary Support Team can view the pending results and modify the report of voting as necessary. (cast vote/comment on behalf of a voter/commenter)

NCIB CLOSE
- The Secretary/SST select a decision and closes the ballot manually. If there is no pending phase, the ballot is closed automatically at the closing date. The Secretary can select a decision manually.
- The ballot audience receive a notification email of ballot closure
- NCIB results and any comments are visible to the ballot audience

Figure 1 – Workflow National Committee Internal Balloting

* This may vary according to your local setting. In doubt please contact your MBUA
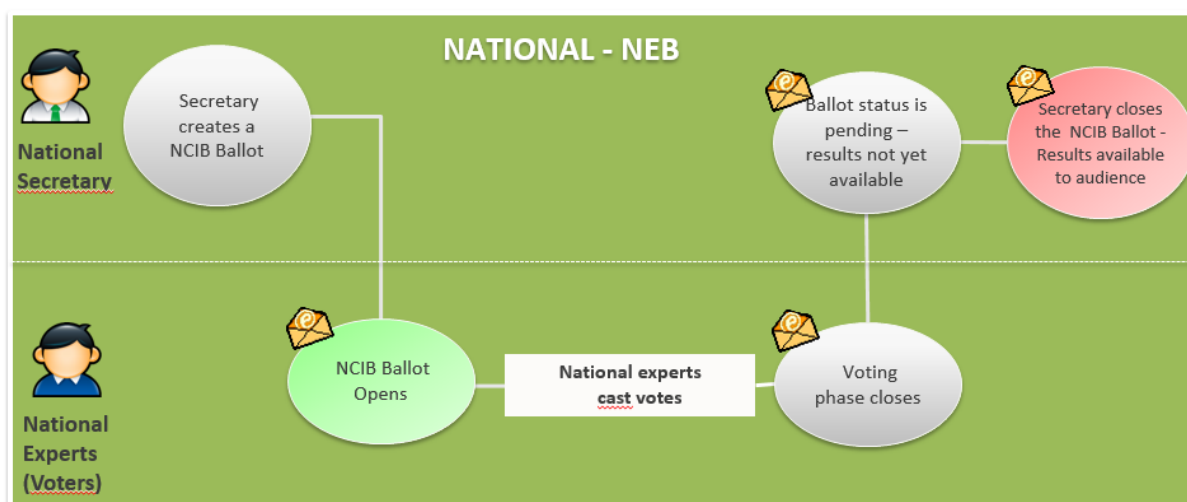
** Pending phase is optional

Figure 2: NCIB ballot life cycle

1.1.2 National Positioning ballot (NPOS)

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".***
>
> *Please contact your MBUA for further information*

> 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*

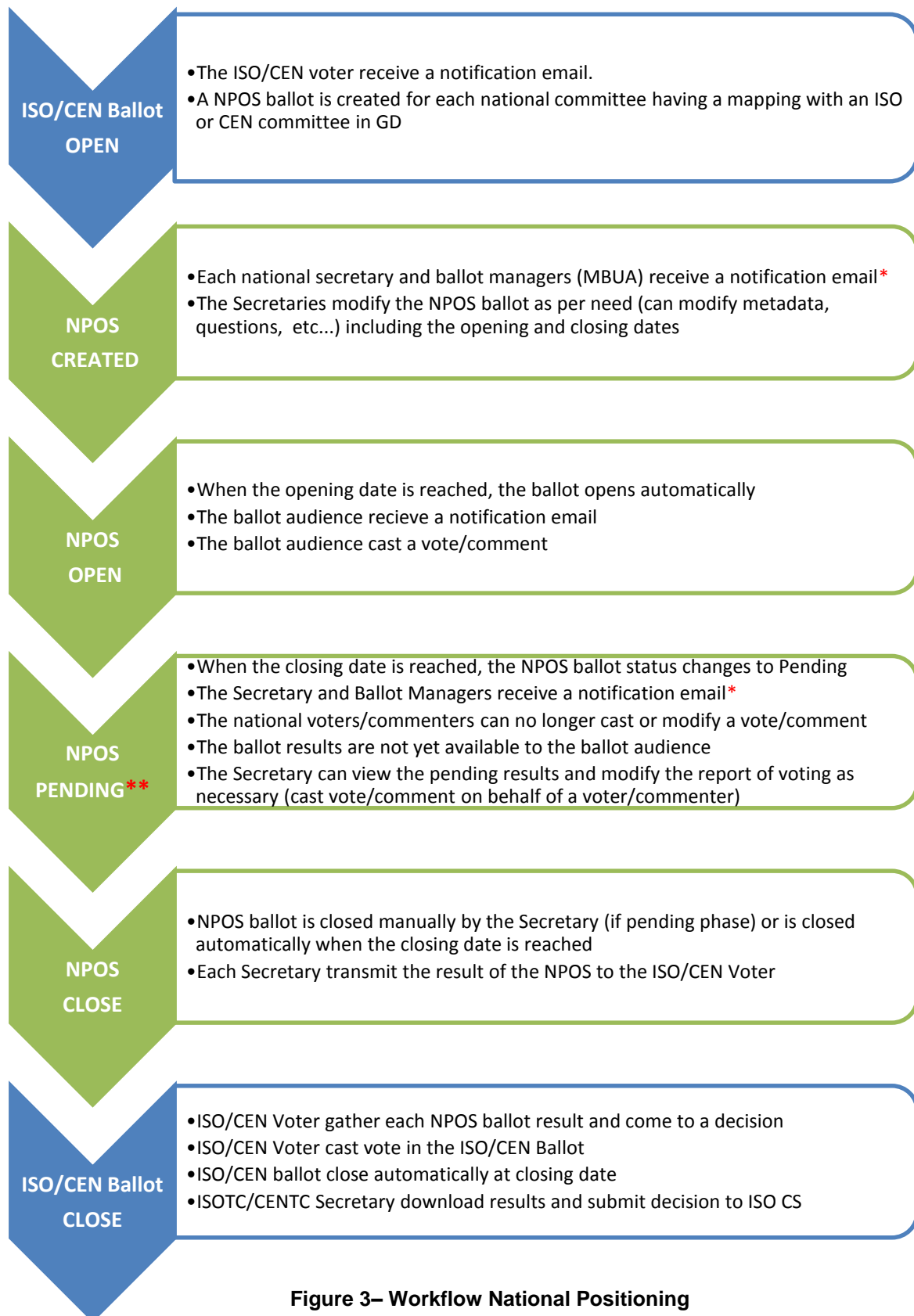The NPOS balloting process and its follow up are characterized by the following main stage

ISO/CEN Ballot OPEN
- The ISO/CEN voter receive a notification email.
- A NPOS ballot is created for each national committee having a mapping with an ISO or CEN committee in GD

NPOS CREATED
- Each national secretary and ballot managers (MBUA) receive a notification email*
- The Secretaries modify the NPOS ballot as per need (can modify metadata, questions, etc...) including the opening and closing dates

NPOS OPEN
- When the opening date is reached, the ballot opens automatically
- The ballot audience recieve a notification email
- The ballot audience cast a vote/comment

NPOS PENDING**
- When the closing date is reached, the NPOS ballot status changes to Pending
- The Secretary and Ballot Managers receive a notification email*
- The national voters/commenters can no longer cast or modify a vote/comment
- The ballot results are not yet available to the ballot audience
- The Secretary can view the pending results and modify the report of voting as necessary (cast vote/comment on behalf of a voter/commenter)

NPOS CLOSE
- NPOS ballot is closed manually by the Secretary (if pending phase) or is closed automatically when the closing date is reached
- Each Secretary transmit the result of the NPOS to the ISO/CEN Voter

ISO/CEN Ballot CLOSE
- ISO/CEN Voter gather each NPOS ballot result and come to a decision
- ISO/CEN Voter cast vote in the ISO/CEN Ballot
- ISO/CEN ballot close automatically at closing date
- ISOTC/CENTC Secretary download results and submit decision to ISO CS

Figure 3– Workflow National Positioning

* This may vary according to your local setting. In doubt please contact your MBUA

** Pending phase is optional
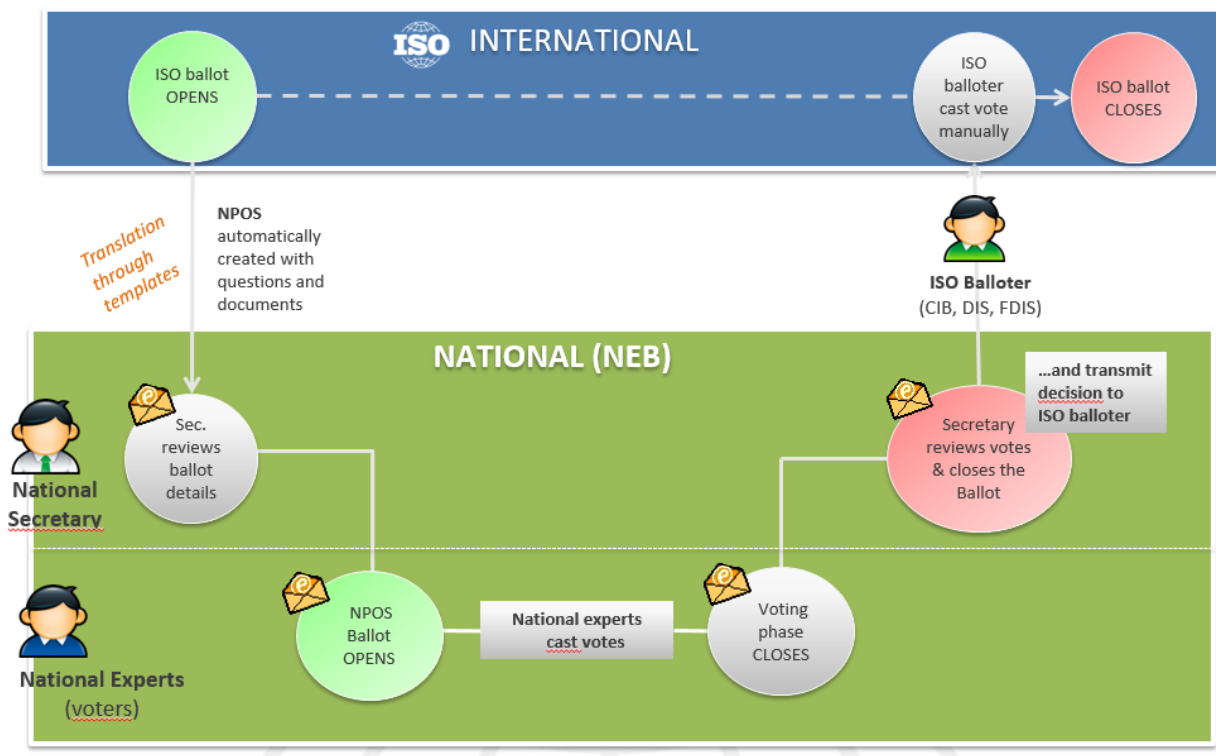
Figure 4: National Positioning – sequence diagram

Note: Pending phase is optional

⚠ *If the metadata or questionnaire of the source ballot changes after the creation of the NPOS, those changes will not be reflected in the national ballot except for the reference documents.*

1.2 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

1.3 Notifications

Notification Type & Function	Name	Ballot Stage	Description	Recipients*
For Your Information	Open & close notifications	Open and closed	Notification email sent when the opening and closing date are reached	Ballot Owner Ballot Manager Voter Commenter Monitor Surveyor
Action required	reminders to vote	4 week and 1 week before closure of ballot	Reminder email on all ballots for which the voter has not yet voted	Voter
Action required	administrative action	Created and Pending	Notification email sent when a Ballot (NCIB, NPOS(A) and NPOS(M)) has been created but is not yet open and when a ballot went to "Pending state"	Ballot Manager Ballot Owner

Table 2 - Notifications

The recipients of each type of notification may differ from one National Member Body to the other according to individual settings

An event (open, close etc...) is automatic only once! When an open ballot is moved back to created, it will have to be reopen manually. It's the same for the closing.

2 Logging in and logging out

2.1 Logging in

Your username will be sent to you by e-mail after your initial registration by your National Member Body in the ISO Global Directory and will contain a link to choose a password and activate your account. Please follow the instructions in the email to activate your account and choose a password.

After activating your account, follow these steps to login:

a) Start your Internet browser and open the following URL: https://isolutions.iso.org

b) Click on **National eBalloting**
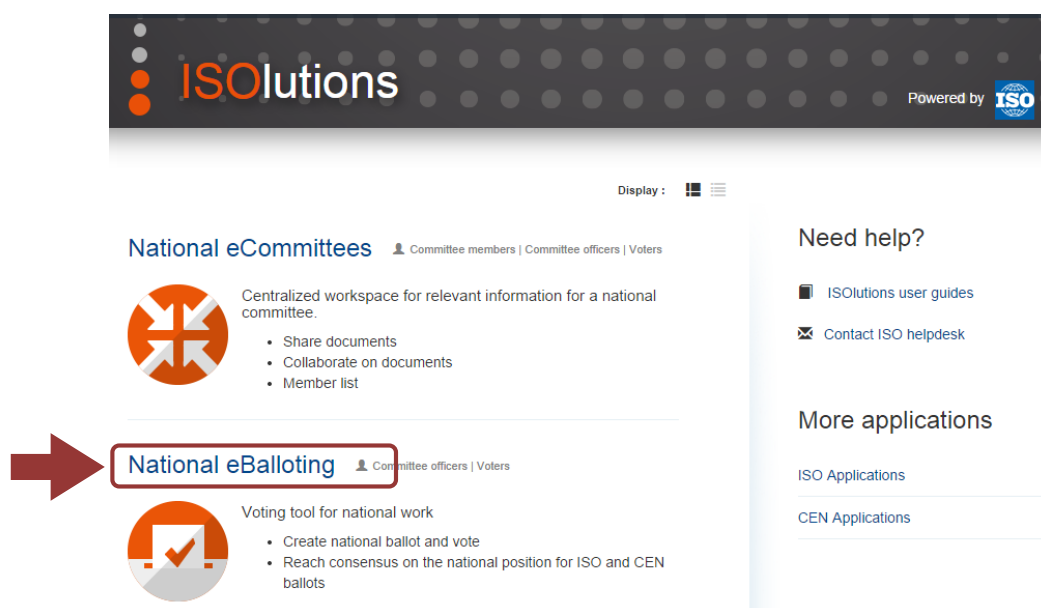
Figure 5 - Sign into applications

c) Enter your username and password

d) Read the declaration and tick the box to accept the conditions
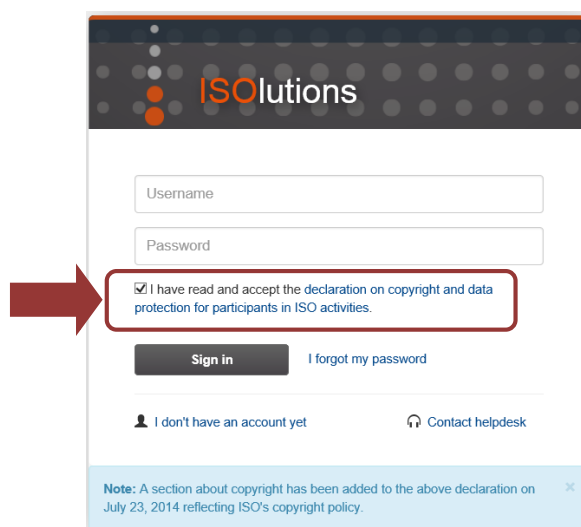
Figure 6- ISOlutions Electronic Applications Login screen

⚠ *Please note that both username and password are case-sensitive, i.e. they have to be entered exactly as provided.*

e) Click on **Sign in**

2.2 Logging out

a) Choose **Log-out** on the **Tools** menu.

b) Click on **Log-out** on the Log-out screen to leave the ISOTC server.

c) You will be forwarded to the list of ISOlutions applications.
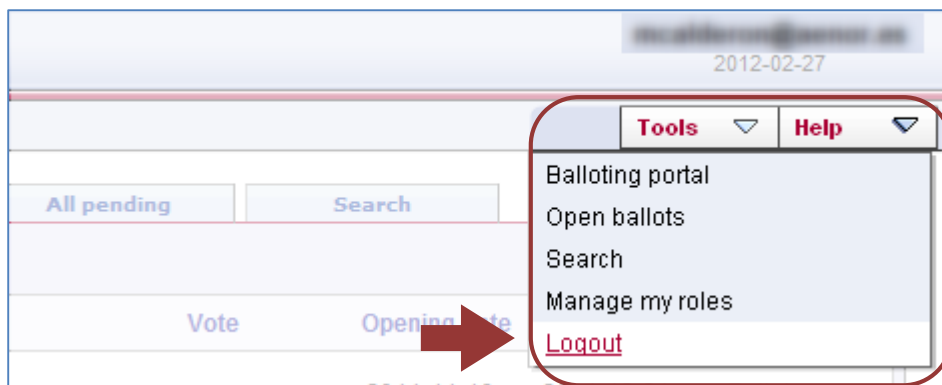
Figure 7– National eBalloting Logout screen

2.3 Password/username forgotten

If you forgot your password, click on the link **I forgot my password** on the login screen and follow the instructions on the screen. Within the next few minutes you will receive an e-mail with a link to reset your password.
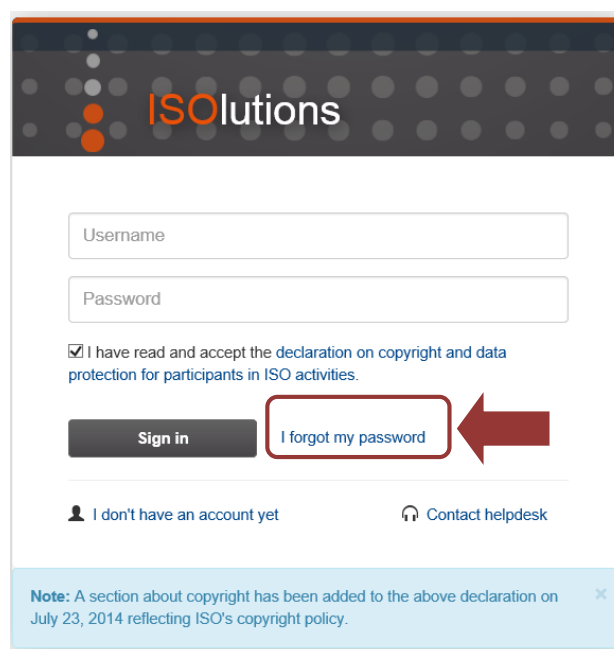
Figure 8- Password forgotten

3 User interface and navigation

3.1 Navigation

The **home page** displays a list of all currently open ballots, which you are allowed to view depending on the roles assigned in the ISO Global Directory (note that the list is different for users performing different roles).

Figure 9–National Electronic Balloting main page

All columns in the Home Screen are sortable. By clicking on the column heading the column will be sorted. Clicking a second time will reverse the sort.

Sorting applies to all ballots currently found (the number indicated on top of the ballot list) and not only to the ballots displayed on the current screen. Therefore, a ballot may disappear from the 20 listed due to the sorting

Columns	Description
Type	Type of national ballot
Committee	National Technical Committee
Reference	Reference of the national ballot
Vote	Number of votes casted to date
Opening date	Vote opening date
Closing date	Vote closing date
Role	The role of the person viewing the ballot
Source type	Type of ISO/CEN ballot linked to the NPOS (NP, CD, DIS or FDIS etc…)
Source	The ISO/CEN committee linked to the NPOS

Table 3 – National Electronic Balloting column descriptions

*The **Source type** and **Source** fields are only relevant and available for NPOS ballots*

The tabs at the top of the page have the following functions (from left to right):
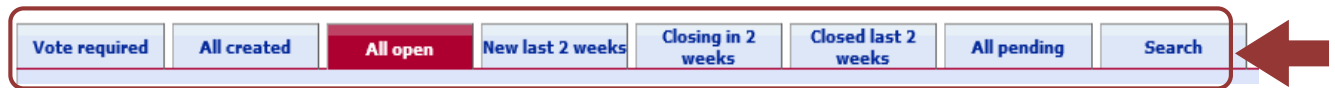
Figure 10 – National Electronic Balloting tabs

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

Table 4 – National Electronic Balloting tabs functions

3.1.1 Navigate in multi-domains

If you work for several ISO Members, you are able to access all the balloting environments without logging out of the application.

To change domain, click on the function menu (little down arrow) next to the NSB logo and select the domain in which you want to work

Figure 11–Multi-domain selection

3.2 Searching for ballots

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 12 -Search functionalities

Search criteria

Enter your search criteria here and click "Search"
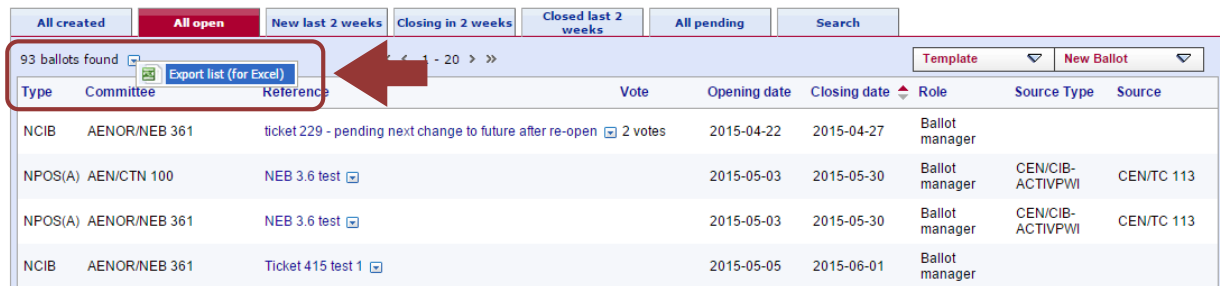
The Search screen allows to enter or to select parameters in the following search fields:

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 5 -Search parameters

3.3 Download list of ballot in excel

The list of ballot can be exported to excel. Click on the function menu next to the number of ballot found

3.4 Accessing closed ballots

Closed ballots can be accessed in two ways:

- Click on "**Closed last 2 weeks**" from the main screen, which will list all ballots which have been closed during this period.

- Open the **Search screen** and then choose from the field *Status* the value "**Closed**". Enter additional search values to further specify your query.

3.5 Viewing the details of a ballot

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

Figure 13 - Open ballot details

This will open the Ballot details screen:

Figure 14 - Ballot Information screen

The ballot contains tabs with the following information:

Tabs	Description
Information	Lists the ballot attributes, the reference documents or hyperlinks, questions and vote values
Participation	Lists of ballot owners and voters. This tab is only visible to the Secretary and support team (ballot owner)
Audience	List the complete ballot audience. This tab is only visible to the Secretary and support team (ballot owner)

Table 6 -Tabs in ballot details screen

3.6 Tools Menu

The tools menu provides shortcuts to access different functions of the electronic balloting application:
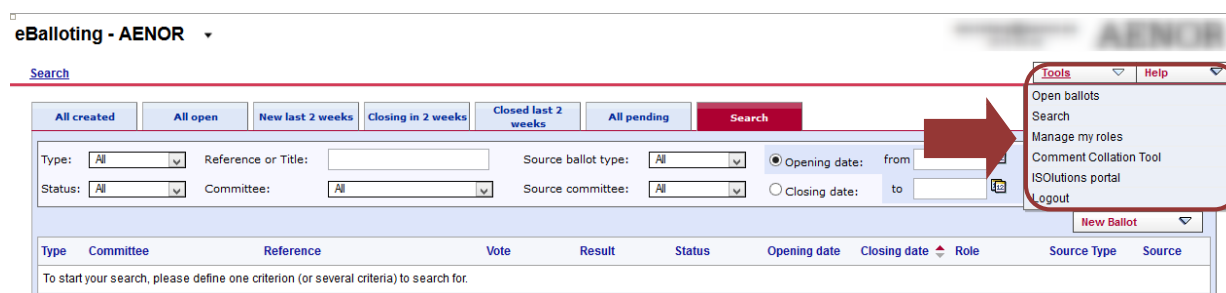
Figure 15 -Tools menu

Within the Tools menu there are the following options:

Tools menu	Description
Open Ballots (same as tab **All Open**)	This function displays all the open ballots to which a user is registered.
Search	Direct link to the **Search** tab
Manage my roles	Displays all the roles of the user. Roles can be disabled temporarily and re-enabled.
Comment Collation Tool	Link to the ISO Comment Collation Tool
ISOlutions Portal	Link to the ISOlutions Portal (https://isolutions.iso.org)
Logout	Logout of the national eballoting application

Table 7- Tools menu options

3.7 Help Menu

The Help menu provides an easy way to access help files on Electronic Balloting, User Guides and release notes.

Figure 16 - Help Menu

4 Creating New Ballots

4.1 National Committee Internal Ballot (NCIB)

4.1.1 Create a new Committee Internal Ballot (NCIB)

In the **National Committee Internal Ballot** section, click on **Ballot** and in the drop-down menu that appears select **National Committee Internal Ballot**

Figure 17 -Create a New National Committee Internal Ballot (NCIB)

This will launch a 4-step wizard that will help you create the NCIB ballot.
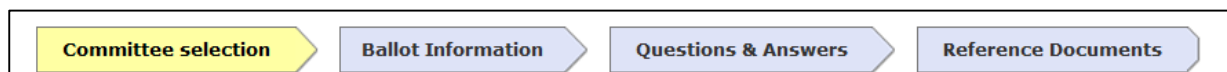
Figure 18 -4-step wizard

Step 1 – Committee selection

This step allows you to select the national committee for which you wish to create a NCIB ballot. Select the committee from the drop-down list

> *The drop-down list will only display national committees for which you are registered as Secretary or Secretary support team in the Global Directory.*
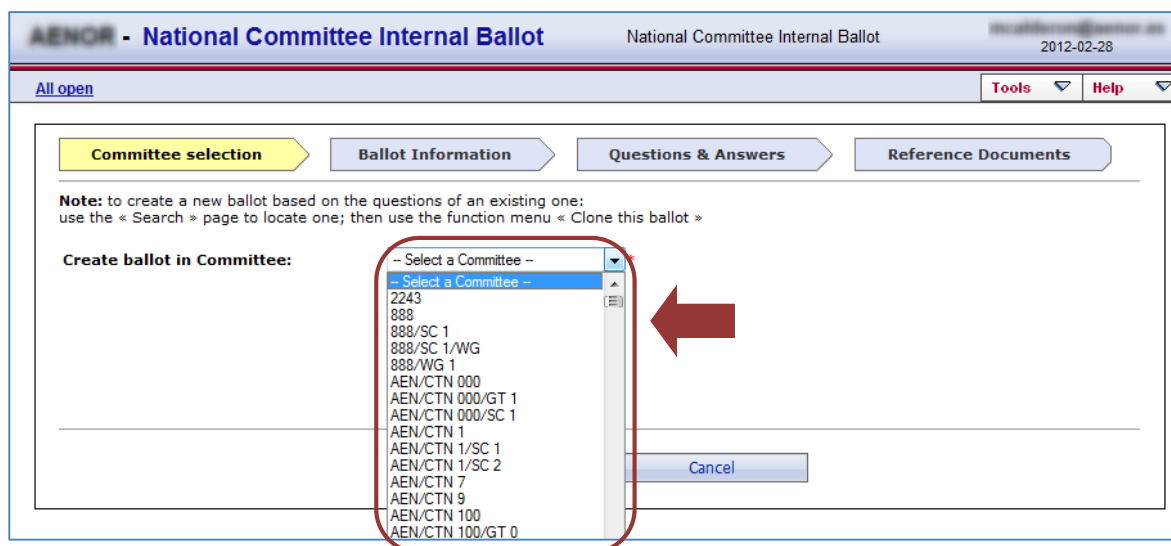
Figure 19 - Committee selection

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 ballot's metadata, i.e. ballot reference, title, project reference, opening date, and closing date. Fill in at least all the required fields marked by a red asterix (*****) and click the **Next** button.

Figure 20 - Ballot Information

Fields	Description
Reference	Ballot reference.
Title	The title of the ballot
Project reference	The reference of the national project
Pending phase	Tick to create a pending phase before closure of the ballot. The ballot will not close automatically
Opening date	Vote opening date
Closing date	Vote closing date
Notes	Any notes relevant to the ballot.

Table 8- Ballot Information – Field Description

The ballot **reference** must be a unique field (i.e. A National Committee cannot have two ballots with the same reference.)

The **Opening date** should be greater than or equal to the real date.

The **Closing date** cannot be in the past

Ballots open and close at midnight at your local time of the opening and closing date respectively

Step 3 – Questions & Answers

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

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

Figure 21 - 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 22 - 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 9- 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 23 - 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 add documents to the ballot.

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 10- 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 24 - 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 25 - Add new reference document from Livelink

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

Figure 26 – Browse NTC library

– Add new link

To add a link, do as follows:

❖ select the option **Add new link**
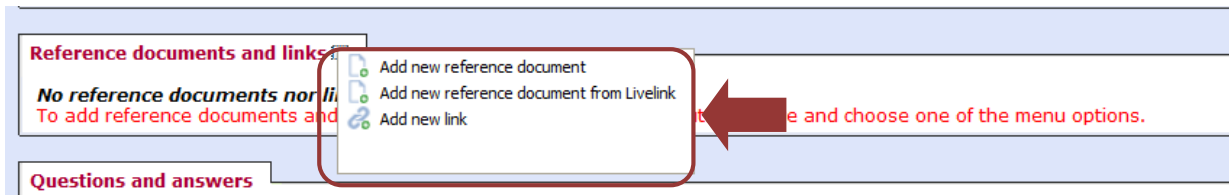
Figure 27 - Add new link

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

Figure 28 - 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 ballot will remain in* C*reated status until the opening date is reached. The ballot is not visible to the audience.*
>
> *While the ballot is in status **Created** you can change all the information of the ballot, including the questionnaire.*

4.1.2 Create a NCIB ballot from an existing template

In the **National Committee Internal Ballot** section, click on **Ballot** and in the drop-down menu that appears and select **the relevant template**
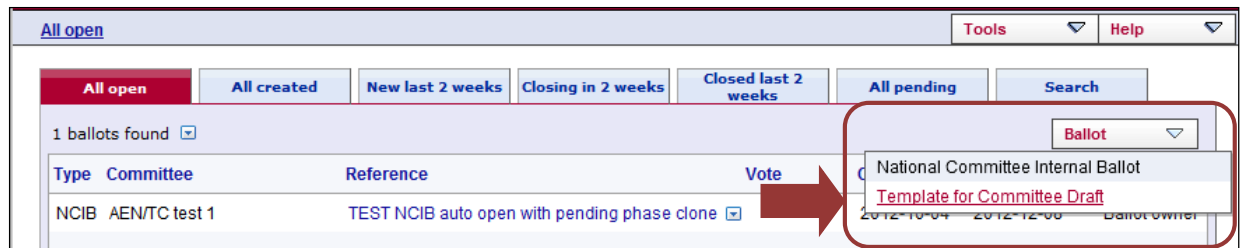
Figure 29 -Create a National Committee Internal Ballot (NCIB) using a template

This will launch a 4-step wizard that will help you create the NCIB ballot.
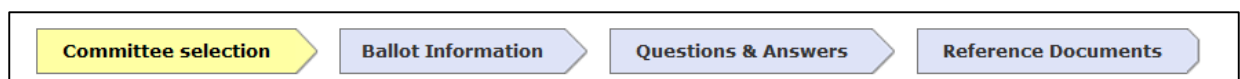
Figure 30 -4-step wizard

Step 1 – Committee selection

This step allows you to select the national committee for which you wish to create a NCIB ballot. Select the committee from the drop-down list

> *The drop-down list will only display national committees for which you are registered as Secretary or Secretary support team in the Global Directory.*
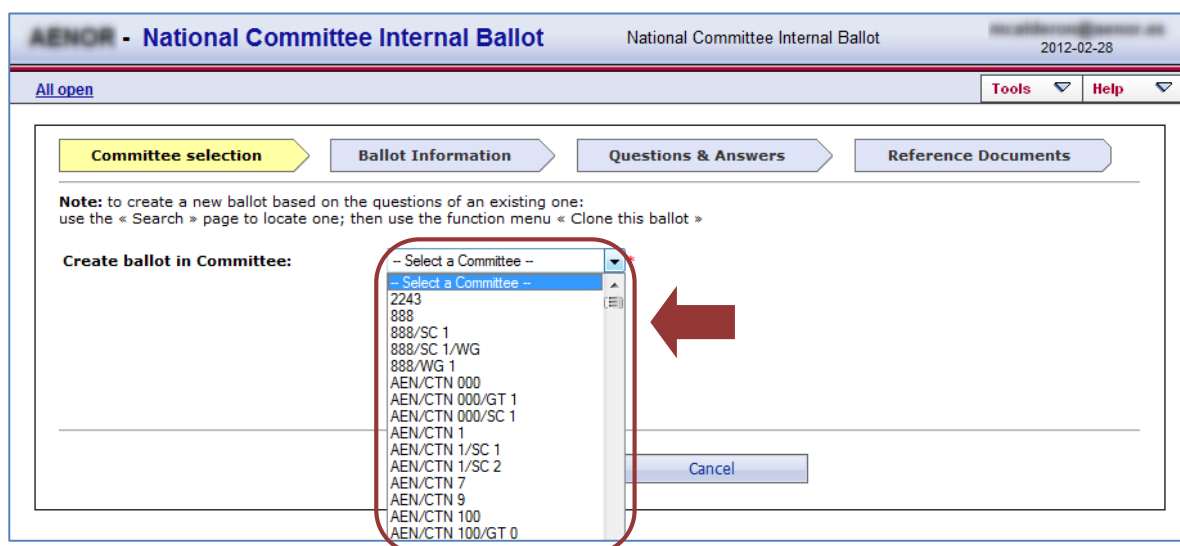
Figure 31 - Committee selection

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 ballot's metadata, i.e. ballot reference, title, project reference, opening date, and closing date. Fill in at least all the required fields marked by a red asterix (*****) and Click the **Next** button.

Figure 32 - Ballot Information

Fields	Description
Reference	Ballot reference.
Title	The title of the ballot
Pending phase	Tick to create a pending phase before closure of the ballot. The ballot will not close automatically
Project reference	The reference of the national project
Opening date	Vote opening date
Closing date	Vote closing date
Notes	Any notes relevant to the ballot.

Table 11- Ballot Information – Field Description

*The ballot **reference** is a unique field (i.e. you cannot have two ballots with the same reference.*

*The **Opening date** should be greater than or equal to the real date.*

Ballots open at midnight at your local time

Step 3 – Questions & Answers

This step displays the list of questions and answers of the ballot according to the template.

Once ready, click the **Create** button to move to Step 4.

> *Note that until you click the button **Create**, you can go back anytime in the process by clicking the **Previous** button to modify the ballot data*.

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 add documents to the ballot.

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 document as a link

Table 12– Uploading options

– 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 33 - 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**
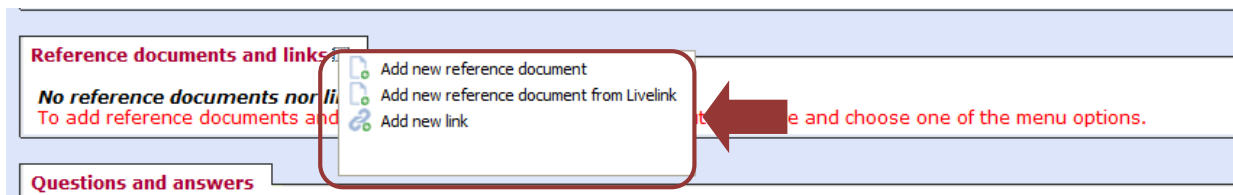
Figure 34 - Add new reference document from Livelink

❖   Browse the NTC library to select the documents to be uploaded and click on **Load**
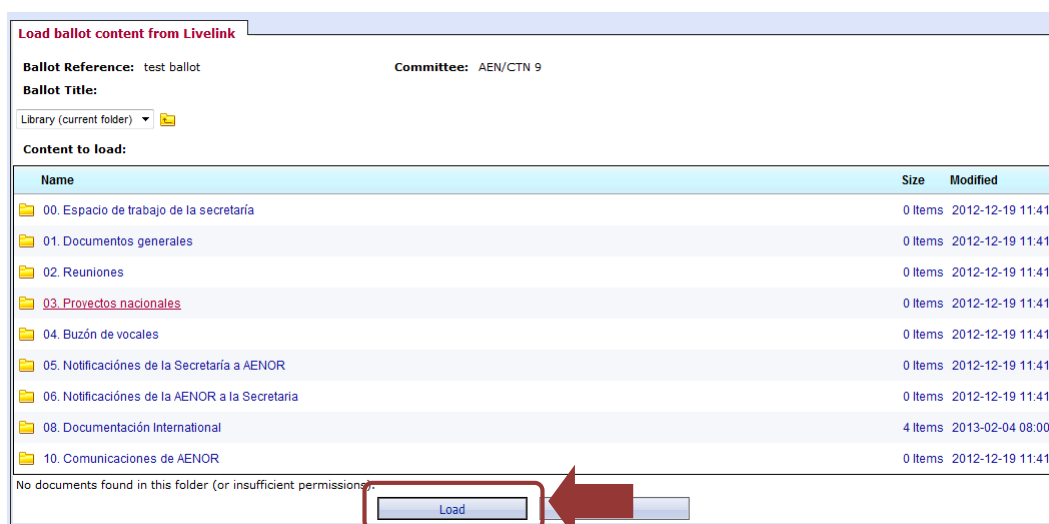
Figure 35 – Browse NTC library

– Add new link

To add a link, do as follows:

❖   select the option **Add new link**
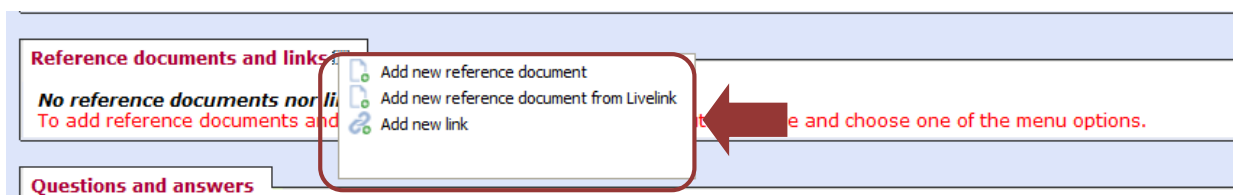
Figure 36 - Add new link

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

Figure 37 - 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 ballot will remain in C**reated** status until the opening date is reached. The ballot is not visible to the audience.*
>
> *While the ballot is in status **Created** you can change all the information of the ballot, including the questionnaire.*

4.2 National Positioning (NPOS)

4.2.1 Create a Manual National Positioning ballot (NPOS (M))

In the **National Positioning ballot** section, click on **Ballot** and in the drop-down menu that appears select **Manual National Positioning**

Figure 38 -Create a Manual National Positioning Ballot

This will launch a 4-step wizard that will help you create the NPOS(M) ballot.

Figure 39 4-step wizard

Step 1 – Committee selection

This step allows you to select the national committee and the source of ballot for which you wish to create a NPOS ballot.

> *The drop-down list will only display national committees for which you are registered as Secretary or Secretary support team in the Global Directory.*

Figure 40 – National Committee and source of ballots selection

> *The source of ballots may differ from one National Member Body to the other according to individual settings*

After the selection of the national committee and source of ballots, the screen will automatically refresh to allow you to select the **reference**, **type** and **committee** to which the NPOS is related (these fields are not mandatory).

When entering the ballot reference, the system automatically propose you a list of source ballot available. Select the source ballot for which you wish to create the NPOS. The **type** and **Committee** fields will be displayed automatically by the system.

Figure 41 – Reference, type and Committee selection

Figure 42 – Auto entry of reference, type and Committee fields

If the source ballot for which you wish to create the NPOS is not listed in the list of source ballot proposed by the system, enter the **Reference**, **Type** and **Committee** manually.

Figure 43 – Manual entry of reference, type and Committee fields

> *The list of source ballots(reference) proposed by the system depends on the relationship of your national committee with the ISO/TC and/or CEN/TC, according to the NTC mapping in the Global Directory.*
>
> *The system returns all source ballots of ISO/TCs and/or CEN/TCs for which your national committee is mapped*

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 ballot's metadata, i.e. ballot reference, title, opening date, and closing date. Fill in at least all the required fields marked by a red asterix (*****) and Click the **Next** button.

Figure 44 - Ballot Information

If a source ballot is found in step 1, the system automatically fill in the ballot information according to the source ballot however you can edit it if needed

Fields	Description
Reference	Ballot reference.
Title	The title of the national ballot
Pending phase	Tick to create a pending phase before closure of the ballot. The ballot will not close automatically
Opening date	Vote opening date
Closing date	Vote closing date
Note	Any notes relevant to the national ballot.

Table 13- Ballot Information – Field Description

*The ballot **reference** is a unique field (i.e. A national committee cannot have two ballots with the same reference.*

*The **Opening date** should be greater than or equal to the real date.*

Ballots open at midnight at your local time

Step 3 – Questions & Answers

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

If a source ballot is found in step 1, the system automatically fill in the ballot questionnaire according to the source ballot however you can modify/delete and/or add questions and answers if needed

IMPORTANT: The questionnaire of ISO/NP and ISO/SR, CEN/FV & UAP ballots cannot be modified as it is a dynamic questionnaire (question 2 will depends on the answer given in question 1)

❖ **Define questions**
  ▪ Define the question in the textbox.
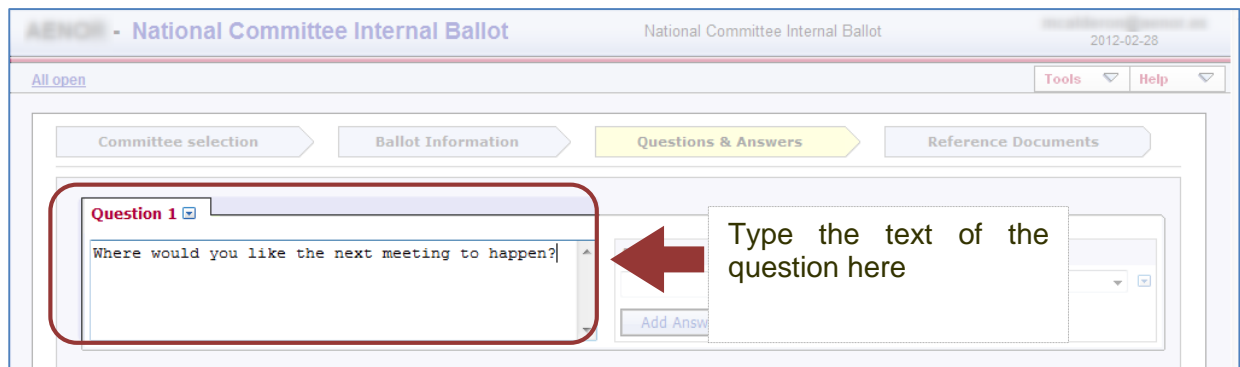
Figure 45 - Define question

❖ **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**.
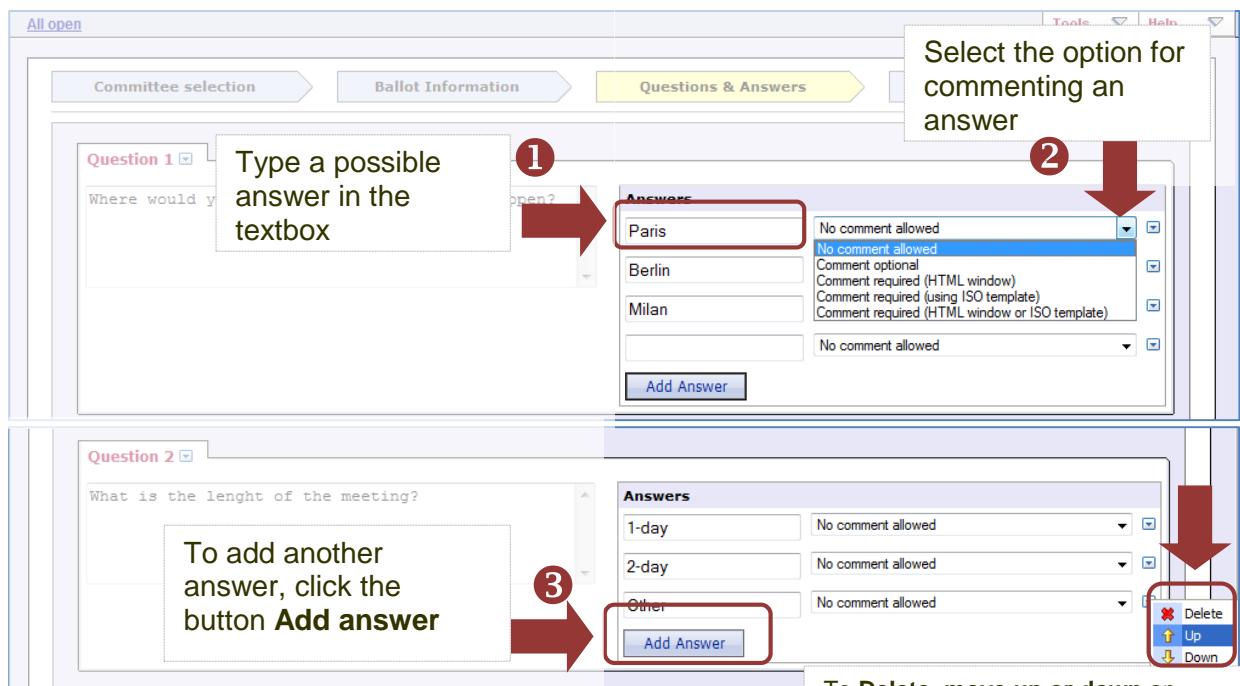
Figure 46 - Define Answers

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 ISO template)	Voter must add a comment using an ISO 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 14- 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**.
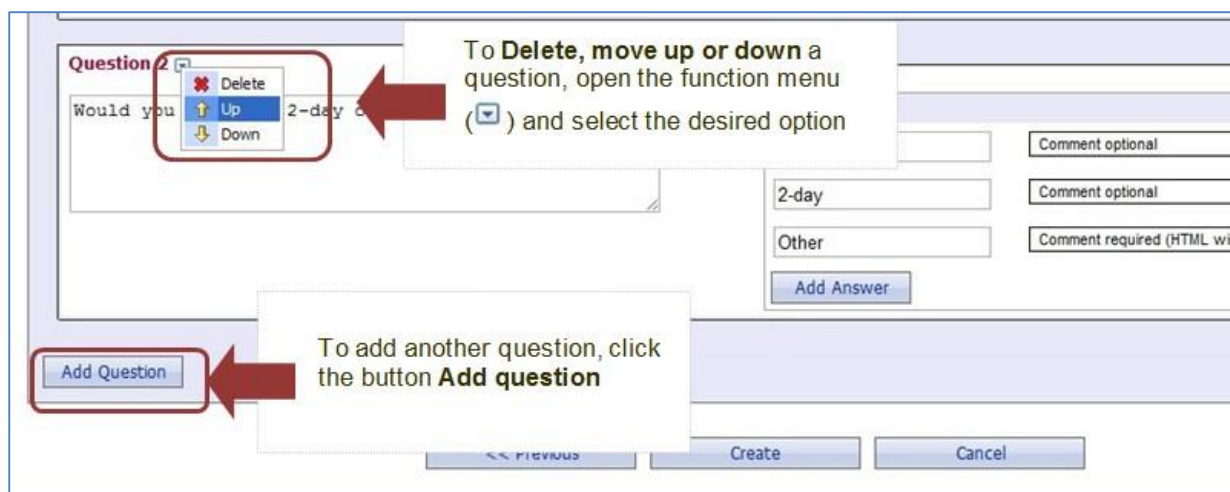
Figure 47 - Add more questions

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 add documents to the ballot.

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 document as a link

Table 15– Uploading options

– 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 48 - 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**
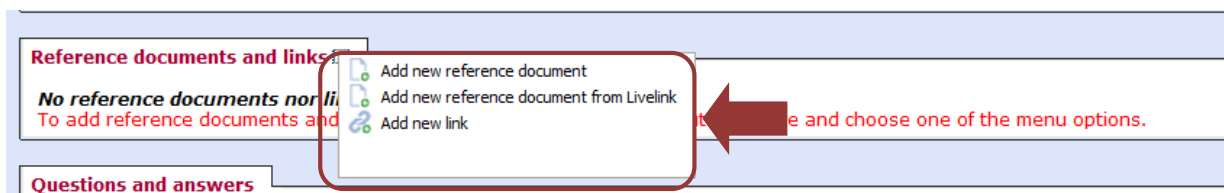
Figure 49 - Add new reference document from Livelink

❖ Browse the NTC library to select the documents to be uploaded and click on **Load**
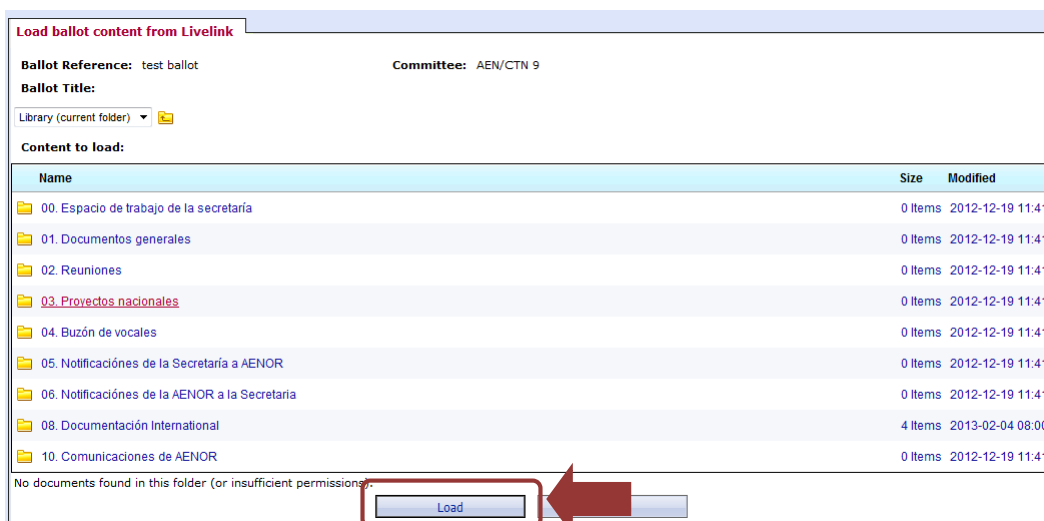
Figure 50 – Browse NTC library

– Add new link

To add a link, do as follows:

❖ select the option **Add new link**
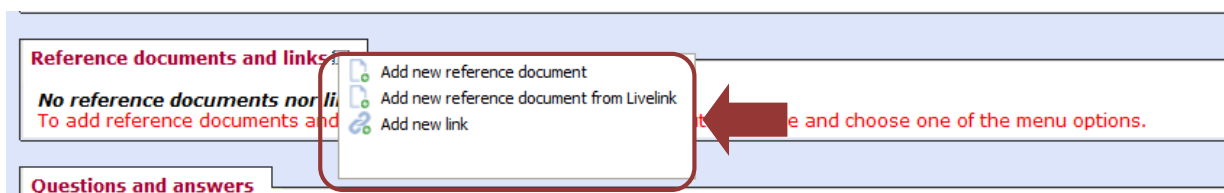
Figure 51 - Add new link

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

Figure 52 - Add URL Reference

❖ Click on **Submit**.

The NPOS (M) 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 ballot will remain in Created status until the opening date is reached. The ballot is not visible to the audience.*
>
> *While the ballot is in status **Created** you can change all the information of the ballot, including the questionnaire.*

4.2.2 Update the metadata of Automatic National Positioning Ballots (NPOS (A))

The National Positioning Ballot is created automatically in the National eBalloting portal as soon as an ISO or CEN ballot opens.

The ballot **information**, **questionnaire** and **reference documents** are copied automatically from the source ballot to the NPOS (A) ballot but you can edit these data as needed as long as the ballot is in the status **Created**.

For detailed information on how to **Edit a ballot** please refer to section **5 Editing existing ballot**

> **IMPORTANT:** *The questionnaire of ISO/NP and ISO/SR, CEN/FV & UAP ballots cannot be modified as it is a dynamic questionnaire (question 2 will depends on the answer given in question 1)*

> *A notification email is sent to the Secretary, Secretary Support Team and Ballot Managers when a new NPOS (A) is created*
>
> *Note: Notification settings This may vary according to your local setting. In doubt please contact your MBUA*

The **Opening date** is automatically set to X days* after the source ballot opening date. The **Closing date** is automatically set to X days prior the source ballot closing date.

* Check your local setting with your NSB

If the metadata or questionnaire of the source ballot changes after the creation of the NPOS, those changes will not be reflected in the national ballot except for the reference documents.

4.3 Cloning an existing NCIB or NPOS ballot (copy questions and answers)

Cloning a ballot will create a new ballot by copying the questions and answers from an existing one. After cloning a ballot you will still have to define the ballot information (metadata) (reference, title, opening and closing date, etc.) and be able to edit the copied questions and answers.

From the list of ballots that are displayed, open the function menu ( ) of the corresponding ballot you wish to clone and select **Clone this ballot**.
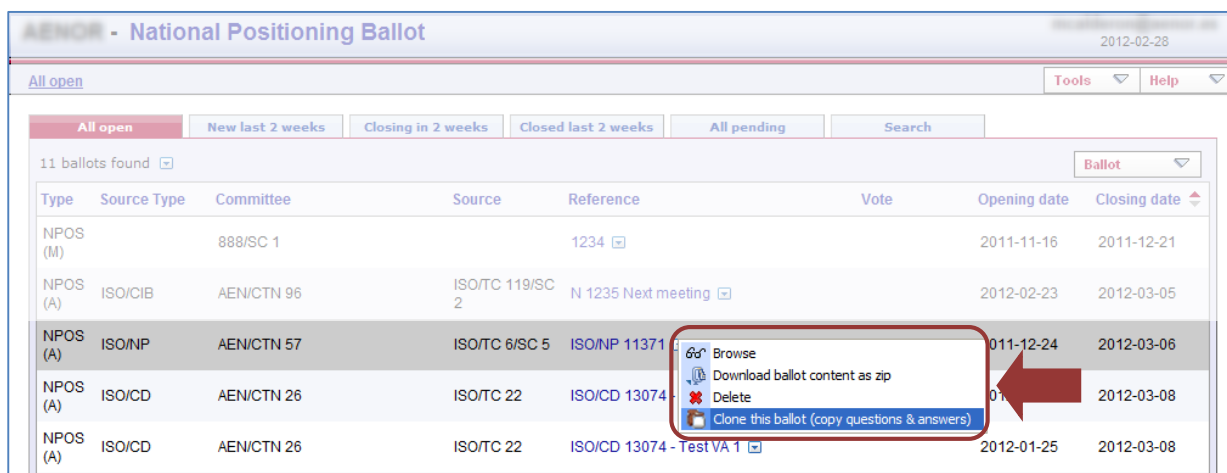
Figure 53 - Clone a ballot

Click **OK** in the pop-up window for confirmation.

You will then be redirected to the usual 4-step wizard.

⚠️   *When cloning a ballot, reference documents are not copied.*

4.4 Full cloning of an existing NCIB or NPOS ballot (copy all ballot information)

The full cloning functionality will create an exact copy of the ballot. The following information is copied:

- Ballot reference
- Ballot title
- Project reference
- Opening and closing date
- Pending phase
- Questionnaire
- Ballot documents

From the list of ballots that are displayed, open the function menu (⊡) of the corresponding ballot you wish to clone and select **Full Cloning of this ballot**.

Figure 54 – Full cloning of a ballot

Click **OK** in the pop-up window for confirmation.

You will then be redirected to the usual 4-step wizard.

5 Editing existing ballots

Existing ballots can be modified by the ballot owner at any time as long as the ballot is not closed.

A voter can edit and/or delete a vote as long as a ballot is open.

No notifications are sent after a change has been made

5.1 Modify ballot information

To update ballot 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 55 - Editing ballot information

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

Update the information as appropriate and click on Submit

Figure 56 - Update ballot metadata

Some information on the different values in the Ballot status field:

Ballot Status	Explanation	Visibility of the ballot
Created	The ballot has been created by the Secretary/Support Team (completion of stages 1 to 3 of the ballot creation process)	Secretary/Support Team and ballot manager only
Open	The ballot has opened for voting after reaching the Opening Date. Email notifications regarding the opening of the ballot are sent to the ballot audience. Votes can be cast and comments submitted	**Voter/commenter:** Ballot information and ballot document(s); own vote and comments. **Secretary/Support Team**: the same, plus all votes and comments submitted at a certain point in time **Surveyor:** Can see votes/comments casted by all committee members
Pending	The national voters can no longer cast or modify a vote. The ballot results are not yet available to the ballot audience The Secretary and Secretary Support Team can view the pending results and modify the report of voting as necessary.	**Voter/commenter:** Ballot information and ballot document(s); own vote and comments. **Secretary/Support Team**: Ballot information and ballot document(s); voting results **Surveyor:** Can see votes/comments casted by all committee members
Closed	The ballot has closed for voting after reaching the closing date. Email notifications regarding the closing of the ballot are sent to the ballot audience. The ballot result is fixed and changes to the ballot are no longer possible. If the ballot has closed automatically the Secretary and SST can approve/disapprove the results	**Voter/commenter:** Ballot information and ballot document(s); Voting results **Secretary/Support Team:** Same as voter **Surveyor:** Can see votes/comments casted by all committee members **Ballot monitor:** Can see votes/comments casted by all committee members

Table 16– Ballot Status

⚠️ An event (open, close etc...) is automatic only once! When an open ballot is moved back to created, it will have to be reopen manually. It's the same for the closing.

5.2 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:
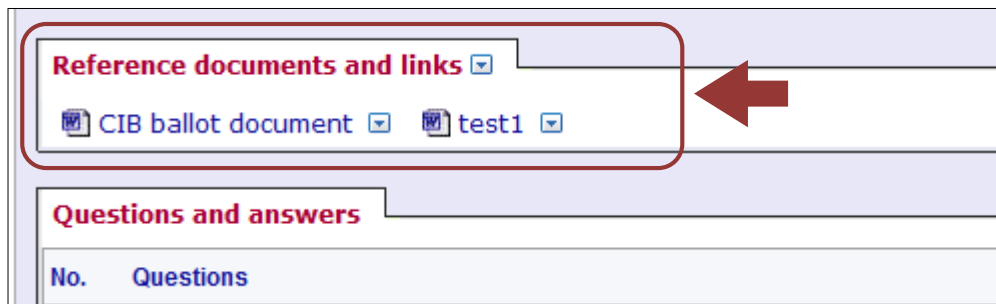
Figure 57 - Update Reference documents and links

1 – 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 58 - Add new reference document

2 – Add new reference document from Livelink

To attach a document from Livelink, do as follows:

- ❖ select the option **Add new reference document from Livelink**
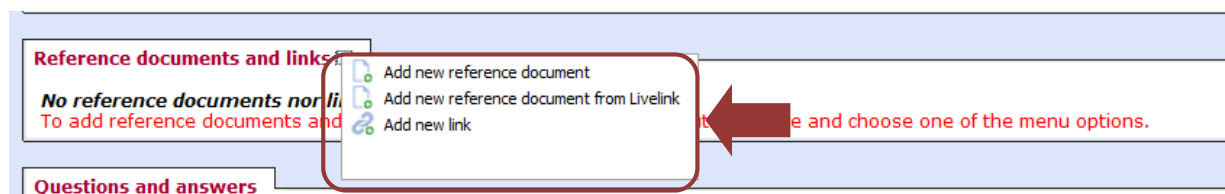
Figure 59 - Add new reference document from Livelink

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

Figure 60 – Browse NTC library

3 – Add new link

To add a link, do as follows:

❖ select the option **Add new link**

Figure 61 - Add new link

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

Figure 62 - Add URL Reference

❖ Click on **Submit**.

5.3 Modify questions/answers

*Questions/answers can only be modified if the ballot is in status **Created** (i.e. the ballot has not opened for voting yet)*

IMPORTANT: *The questionnaire of ISO/NP and ISO/SR, CEN/FV & UAP ballots cannot be modified as it is a dynamic questionnaire (question 2 will depends on the answer given in question 1)*

To update the questions/answers of a ballot click on the function menu (little blue arrow) next to Questions and answers and click on **Edit.**

Figure 63 - Edit Questions and answers

For detailed instructions on how to edit questions and answers, please refer to section xxxx

5.4 Delete a ballot

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

Figure 64 – Delete a ballot

6 View ballot audience and cast vote as or submit comment as

6.1 View the ballot audience

From the ballot information screen, click on the **Audience tab** to open it.

Figure 65 - Ballot audience

The **Audience** tab lists all the individuals having a balloting role in the national committee. In order to find the people that are entitled to vote, scroll the page down to the section **voter**

> *You can send an email to all **voters** by clicking on the envelope icon (✉) next to the section title.*

Figure 66 – Audience tab

In the audience tab you can also view which national organization an individual is representing. This is the organization that has appointed the expert to the national committee. If there is no organization name, this means that the expert has been appointed by the National Standard Body.

6.2 Cast a vote/comment on behalf of voter/commenter

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

Figure 67 - Cast a vote as and Submit Comments as

The next screen will allow you to first select the voter on behalf of which you will cast the vote, and then the answer to each of the questions in the ballot. Click on the **Cast vote** button to save the vote.

Figure 68 - Enter voting information

Select from the drop down list
the committee member

Figure 69 **– Enter comments**

A pop-up window will confirm the successful operation.

*The Secretary and Secretary Support Team (Ballot owner) can cast a vote on behalf of a voter when the status of the ballot is **Open** or **Pending.***

6.3 Add a vote/comment after the ballot has been closed

As the Secretary or Secretary Support Team, you can re-open a ballot that has closed in order to cast a last minute vote/comment on behalf of a voter/commenter.

To do this, you need to first manually re-open the ballot, then cast the vote, then manually close the ballot again.

Note that re-opening and closing a ballot **will not send any notifications** to the audience.

Step 1: re-open the ballot

Select **Edit** from the Metadata functions menu (little blue arrow next to the Metadata heading)

Figure 70 - Edit Ballot Metadata

On the next screen, set the status field to **Open** and then click **Submit**:
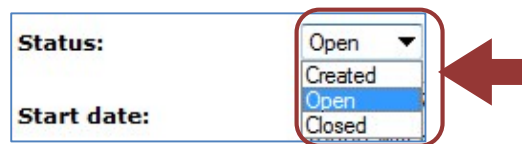

Figure 71 - Edit Ballot Status

You will be taken back to the ballot.

Step 2: Cast the vote

Click on **Cast a vote** on the top right of the screen and enter the vote as explained in section 6.2 Cast a vote/comment on behalf of voter/commenter

Step 3: Close the ballot

Repeat Step 1 and change the Status field to **Closed**

⚠️ An event (open, close etc...) is automatic only once! When an open ballot is moved back to created, it will have to be reopen manually. It's the same for the closing.

.

7 Proceed to pending decision and close ballots

7.1 Download the provisional ballot results/comments (ZIP file)

Open the pending ballot for which you wish to download the provisional results.

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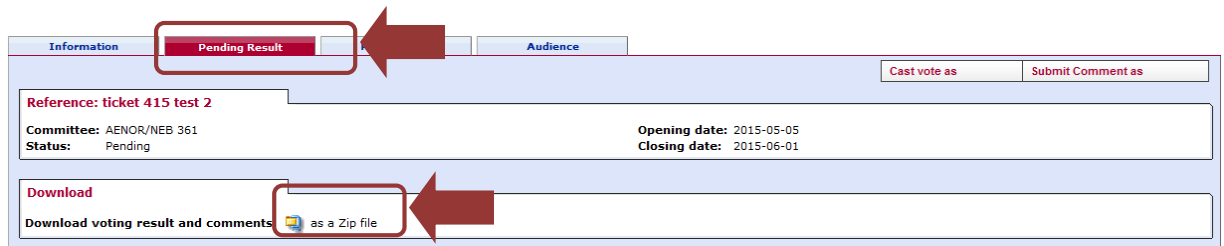

Figure 72 - Download provisional ballot results/comments

Extract the content of the Zip file on your computer by opening the Zip archive and clicking on **Extract**.

Figure 73 - Extract content of Zip file

Browse the content of the extracted folder on your computer (result of voting/index.pdf, Comment files).

Figure 74 - Extracted folder

7.2 Proceed to decision

> *Pending stage is reached at the closing date of the ballot*
>
> *A notification email is sent to the Secretary and Secretary Support Team (Ballot owner)*
>
> *Voters can no longer cast or modify a vote*

⚠️ *The ballot has to be **closed manually** by the Secretary or Secretary Support Team (Ballot owner)*

Open the pending ballot you wish to close. In the **Pending Result** tab, go to the **Action** section at the bottom of the page and:

1. Select the ballot result as appropriate
2. Enter your explanation
3. Close the ballot

Figure 75 – Actions to close ballot

7.3 Proceed to decision when ballot is closed automatically (no pending stage)

ℹ️ *If there is no pending phase, The ballot is closed automatically when the ballot reaches the closing date*

A notification email is sent to the ballot audience

Voters can no longer cast or modify a vote

⚠️ *The ballot is closed automatically but the Secretary or Secretary Support Team can still approve/disapprove the ballot results*

Open the closed ballot you wish to proceed to decision. In the **Information** tab, click on the function menu next to the ballot reference and select **Edit.**

Figure 76 – Edit the ballot metadata to proceed to decision

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

Figure 77 – Actions to proceed to ballot results

8 Process voting results and comments

8.1 Download the ballot results/comments (ZIP file)

Open the closed ballot for which you wish to download the results.

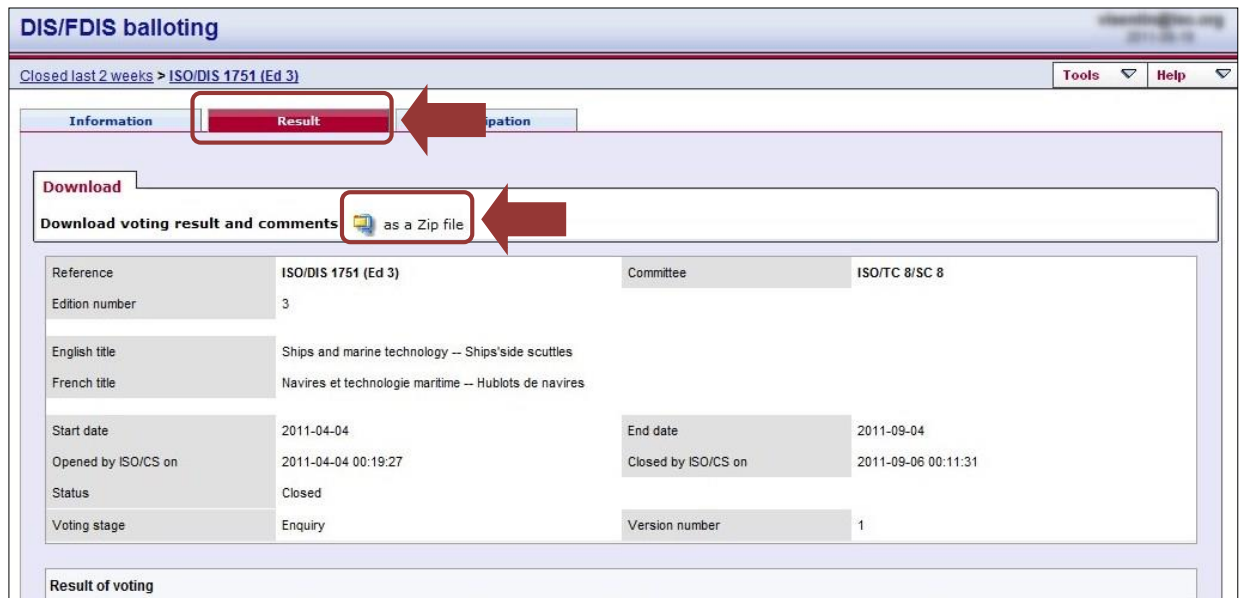In the **Result** tab, click on **voting result and comments as a Zip file** (click on the Zip icon 🗂)

Figure 78 - Download ballot results/comments

Extract the content of the Zip file on your computer by opening the Zip archive and clicking on **Extract**.

Figure 79 - Extract content of Zip file

Browse the content of the extracted folder on your computer (result of voting/index.pdf, Comment files).

Figure 80 - Extracted folder

8.2 Install the Comment Collation Tool (CCT) on your computer

In your internet browser, go to www.iso.org/forms .Here you find the user guides to all ISO electronic applications. Select **Commenting Template & Comment Collation Tool.**

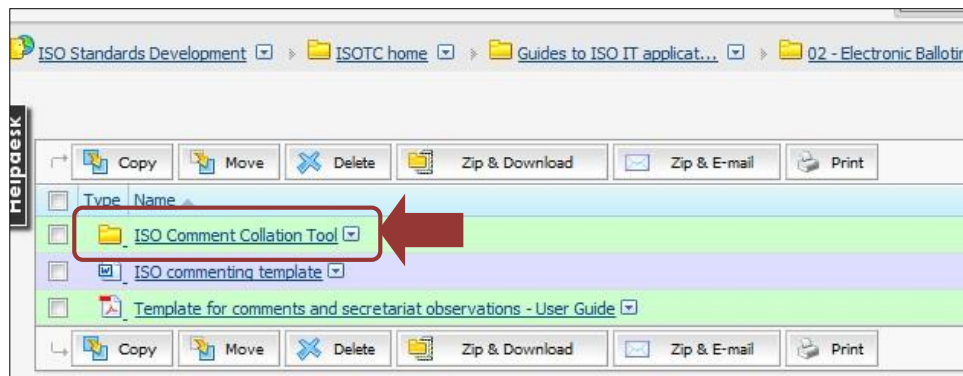From the next Livelink page, open the folder **ISO Comment Collation Tool**

Figure 81 - Comment Collation Tool folder

.

Here you will find the ISO Comment Collation tool for download and the user guide which shows you how to install the tool and use it.
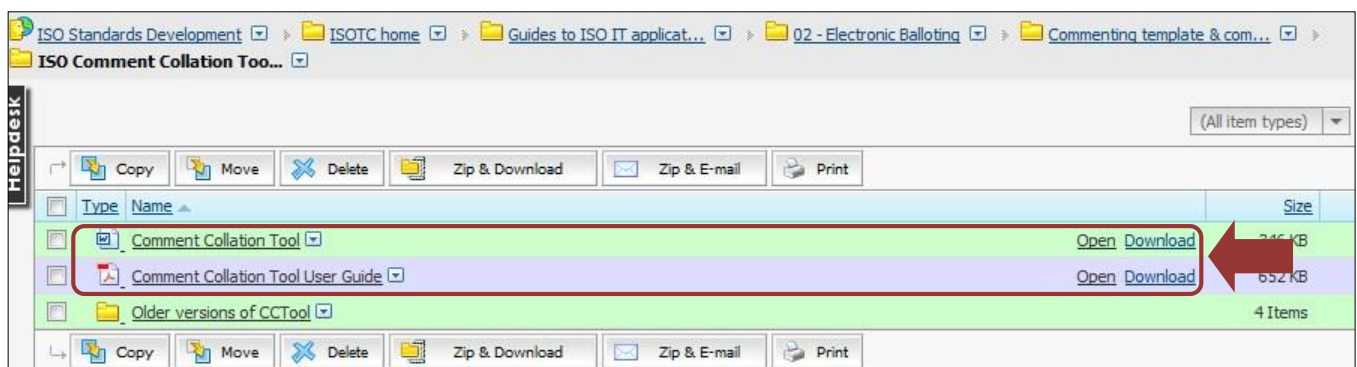

Figure 82 - Comment Collation Tool

⚠️ *The **ISO Comment Collation Tool** allows you to compile comments into one document to finalize the results of the vote*

9 Helpdesk information

To create National committees in the National eCommittees server and to assign users to different National committee roles please contact the Member Body User Administrator team (MBUA) of your country.

For further assistance concerning the National eBalloting application please contact your NSB local helpdesk