Electronic Balloting Portal
CIB Balloting

User guide

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Modifications description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>2010-02-23</td>
<td>Cécile Colinia</td>
<td>Initial version</td>
</tr>
<tr>
<td>1.0</td>
<td>2010-04-20</td>
<td>CC + MB</td>
<td>First Released version</td>
</tr>
<tr>
<td>1.1</td>
<td>2011-12-01</td>
<td>EDP/CC</td>
<td>Permissions to vote and comment updated</td>
</tr>
<tr>
<td>2.0</td>
<td>2014-12-16</td>
<td>EDP/CC</td>
<td>CIB Templates added</td>
</tr>
</tbody>
</table>
Table of Contents

1 INTRODUCTION ........................................................................................................................................... 3
   1.1 COMMITTEE INTERNAL BALOTTING WORKFLOW ................................................................. 4
   1.2 ELECTRONIC BALOTTING APPLICATION OVERVIEW ................................................... 5
   1.3 PRINCIPLES OF THE ELECTRONIC BALOTTING APPLICATION ........................................ 6
      1.3.1 Permissions to vote and comment ......................................................................................... 6
      1.3.2 Management of users and their balloting roles ................................................................. 6
      1.3.3 Centralized and decentralized modes of balloting .......................................................... 6
      1.3.4 Committee Internal Balloting roles ..................................................................................... 7
   1.4 ACCESS TO EBALOTTING PORTAL .......................................................................................... 8
      1.4.1 Access through CEN Electronic Applications homepage ................................................. 8
      1.4.2 Access directly from eCommittee homepage ..................................................................... 10

2 LOGGING IN AND LOGGING OUT ........................................................................................................... 11
   2.1 LOGGING IN ............................................................................................................................... 11
   2.2 LOGGING OUT ............................................................................................................................ 12
   2.3 PASSWORD/USERNAME FORGOTTEN ....................................................................................... 12

3 USER INTERFACE AND NAVIGATION .................................................................................................. 13
   3.1 CIB BALOTTING - NAVIGATION ............................................................................................. 13
   3.2 SEARCHING FOR BALLOTS ....................................................................................................... 14
   3.3 ACCESSING CLOSED BALLOTS .............................................................................................. 15
   3.4 VIEWING THE DETAILS OF A BALLOT .................................................................................. 16
   3.5 TOOLS MENU ............................................................................................................................ 17
   3.6 HELP MENU .............................................................................................................................. 18

4 CREATING A NEW BALLOT .................................................................................................................. 19
   4.1 CREATE AN AD-HOC BALLOT ................................................................................................ 19
   4.2 CREATE A BALLOT BASED ON A TEMPLATE ........................................................................ 26
   4.3 CREATE A NEW BALLOT BY CLONING AN EXISTING BALLOT ....................................... 31

5 EDITING EXISTING BALLOTS ............................................................................................................. 32
   5.1 MODIFY METADATA .................................................................................................................. 32
   5.2 MODIFY ATTACHED FILES ..................................................................................................... 34
   5.3 MODIFY QUESTIONS/ANSWERS (ONLY AVAILABLE FOR AD HOC CIB) ............................. 36

6 VOTING AND COMMENTING ................................................................................................................. 36
   6.1 CASTING A VOTE ....................................................................................................................... 37
   6.2 SUBMITTING A COMMENT ......................................................................................................... 38
   6.3 MODIFYING A VOTE OR COMMENT ......................................................................................... 40
   6.4 DELETING A VOTE OR COMMENT ........................................................................................... 41
   6.5 VIEW THE BALLOT AUDIENCE ............................................................................................... 42
   6.6 CAST A VOTE ON BEHALF OF SOMEONE ELSE ..................................................................... 43
   6.7 SUBMIT A COMMENT ON BEHALF OF SOMEONE ELSE ....................................................... 44
   6.8 ADD A VOTE AFTER THE BALLOT HAS BEEN CLOSED ....................................................... 45

7 PROCESS VOTING RESULTS AND COMMENTS ............................................................................... 46
   7.1 DOWNLOAD THE BALLOT RESULTS/COMMENTS (ZIP FILE) ........................................... 46
   7.2 INSTALL THE COMMENT COLLATION TOOL (CCT) ON YOUR COMPUTER ......................... 47

8 HELPDESK INFORMATION .................................................................................................................. 47
1 Introduction

This document is written for the following users of the Committee Internal Balloting system (see the definition of the different roles in § 1.3.4):

- Voter
- Commenter
- Monitor
- Surveyor
- Content Owner
- Ballot Owner

For each chapter of this document, the roles concerned by the explanation will be indicated as follows:

- [All] : these chapters concern all the roles
- [Voter] : these chapters only concern the Voter
- [Commenter] : only concerns the Commenter
- [Ballot Owner] : only concerns the Monitor
- …
### 1.1 Committee internal balloting workflow

The CIB balloting process and its follow up are characterized by the following main stages:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ballot creation</strong></td>
<td>• The Secretary or Secretary Support Team create a CIB ballot in the CIB eBalloting application.</td>
</tr>
</tbody>
</table>
| **Notification** | • The ballot opens when the opening date has been reached.  
• A notification email is sent automatically to the audience (balloters). |
| **Access and consultations** | • The balloters access the ballot via the CIB eBalloting application and consult the documents under the ballot.  
• If required, the ballot documents are distributed for consultation to determine the vote of the national member body. |
| **Vote** | • Balloters cast the vote and submit comments via the CIB application. |
| **Reminders and Closure** | • An email reminder is sent automatically to the balloters who have not cast a vote 4 weeks and 1 week prior the closure of the ballot.  
• The ballot closes when the closure date has been reached.  
• A notification email of ballot closure is sent automatically to the audience. |
| **Results and follow-up** | • The ballot results and any comments are visible to the ballot audience.  
• The Committee secretariat is expected to take actions on the project and process the comments accordingly.  
• If applicable, the Secretary submits the voting decision to CCMC. |

*Figure 1 - Workflow Committee Internal Balloting*
1.2 Electronic Balloting application overview

Figure 2 - Electronic Balloting application overview
1.3 Principles of the Electronic Balloting application

1.3.1 Permissions to vote and comment

- Authorized to cast votes (with associated comments if needed) are the representatives of CEN Members in the committee, defined as Internal Balloting Voters in the Global Directory. CEN Members can also define a person as CIB centralized Voter which allows the person to vote in CIBs of all the CEN/TCs (see also § 1.3.3).

- Authorized to submit comments are the representatives of external liaison organizations as well as CEN Consultants.

1.3.2 Management of users and their balloting roles

Users are registered in the Global Directory in the roles of committee internal balloters. Users and their roles are registered and maintained by the user administrators of CEN Member Bodies in the Global Directory.

Any changes in user data and role assignments relevant for balloting are immediately reflected in the access permissions for particular users to the balloting application.

In addition to the role of a baloter, there are other balloting related roles defined in the application which are associated with certain permissions (see details in § 1.3.4).

1.3.3 Centralized and decentralized modes of balloting

- Centralized balloting: In this type of balloting, one or more individuals vote on all ballots for which a member body has a responsibility to vote.

- Decentralized balloting: The responsibility to vote is decentralized for each committee or sets of committees to different individuals, who can only vote on a number of committees for which they have been assigned the role of balloters.

The assignment of users to the roles of centralized or decentralized balloters is done by the user administrators of each CEN member body.
### 1.3.4 Committee Internal Balloting roles

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 CEN. Note that each role can be assumed by more than one individual for any given ballot.

<table>
<thead>
<tr>
<th>Balloting roles</th>
<th>Role definitions</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballot Owner</td>
<td>Responsible to initiate and run the balloting process. This role is assumed by the Committee Secretary and his/her Support Team for Committee-Internal Ballots.</td>
<td>Can create ballots of the respective committee(s), has full access to the committee-internal balloting environment. A BallotOwner has also the permission to register a vote or comment in the balloting application on behalf of a Voter or Commenter (if required).</td>
</tr>
<tr>
<td>Voter</td>
<td>User authorized to vote on behalf of his/her national member organization, or some other person(s) appointed by him/her.</td>
<td>Can vote on all ballots inside a particular committee.</td>
</tr>
<tr>
<td>Commenter</td>
<td>Person representing an organization who has no right to vote on a ballot, but can, if needed, submit a comment on a ballot document. Examples: - A representative of a liaison organization, - A representative of another committee of CEN, in liaison with the committee which has originated the ballot</td>
<td>Can comment on all ballots inside a particular committee.</td>
</tr>
<tr>
<td>Monitor</td>
<td>Person representing an organization who has read/viewer-access to all or a subset of the ballots relevant for its organization without having the permission to cast, modify or delete a vote/comment him/herself. This role may also be used to give access to the results when voting is closed.</td>
<td>Can see ballots as well as votes cast by his/her member body, but cannot cast a vote or submit a comment.</td>
</tr>
<tr>
<td>Content Owner</td>
<td>Role given to Committee Chairmen and their support staff to give access to information on Open ballots, and to vote results and comments when ballot is closed.</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 3 - Committee internal balloting roles**
1.4 Access to eBalloting portal

1.4.1 Access through CEN Electronic Applications homepage

You can access the CEN eBalloting application through the CEN Electronic Applications homepage at http://login.cen.eu.

Click on Electronic Balloting on Draft Standards.

From the electronic Balloting on Draft Standards Portal page click on Committee Internal Balloting, this leads you to the balloting application as shown below:
Figure 5 - Electronic Balloting on Draft Standards Portal
1.4.2 Access directly from eCommittee homepage

Alternatively, you can also directly access your committee ballots by clicking on Committee Ballots in the navigation menu of the eCommittee homepage:

![Figure 6 - Access from Committee home page](image-url)
2 Logging in and logging out

2.1 Logging in

Your username and password will be sent to you by e-mail after your initial registration by your National Member Body in the Global Directory and to the CEN eServices (e.g. eCommittees, Electronic Balloting). Please follow the steps 1-5 as described in the mail. You will be asked to change your temporary password by following the URL in the mail. After this:

a) Start your Internet browser and open the following URL: https://login.cen.eu.

b) Click on **Sign into applications**

![Figure 7 - Sign into applications](image)

Figure 7 - Sign into applications

c) Enter your username and password (same username and password used to access the CENTC and Global Directory applications)

d) Read the declaration and tick the box to accept the conditions

![Figure 8 - CEN Electronic Applications Log-in screen](image)

Figure 8 - CEN Electronic Applications Log-in screen

e) Click on **Sign in** and select **Electronic Balloting on Draft Standards**.

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

c) You will be forwarded to the list of CEN applications.

![Figure 9 - Committee internal balloting Logout screen](image)

2.3 Password forgotten

If you have forgotten your password, you can request a new password on the log-in page.

Click on the link **I have lost my password** next to the log-in fields 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. Follow the link and click the Reset Password button. This will send you an email with a new temporary password. Follow the steps 1-5 in the mail exactly to change your temporary password.

![Figure 10 – Password forgotten](image)
3 User interface and navigation

3.1 CIB Balloting - Navigation

The Committee Internal balloting home page displays a list of all currently open ballots, which you are allowed to view depending on the roles assigned in the Global Directory (note that the list is different for users performing different roles and/or representing different member bodies).

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.

The tabs at the top of the page have the following functions (from left to right):
### Tabs

<table>
<thead>
<tr>
<th>Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All open</td>
<td>Displays all the ballots which are currently open and on which you can vote or submit a comment.</td>
</tr>
<tr>
<td>New last 2 weeks</td>
<td>Displays all the ballots which were opened within the last 2 weeks.</td>
</tr>
<tr>
<td>Closing in 2 weeks</td>
<td>Displays all the open ballots which will close during the next 2 weeks.</td>
</tr>
<tr>
<td>Closed last 2 weeks</td>
<td>Shows all the ballots which closed during the last 2 weeks. It allows access to the closed ballots and the individual votes and comments submitted by the member bodies and any commenting liaison organizations.</td>
</tr>
<tr>
<td>Search</td>
<td>Opens the search screen which allows to search with user defined values (e.g. ballots closed more than 2 weeks ago, search with a particular reference number, etc).</td>
</tr>
</tbody>
</table>

**Figure 13 - CIB tabs functions**

### 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 14 – Search functionalities**
The Search screen allows to enter or to select parameters in the following search fields:

<table>
<thead>
<tr>
<th>Search Fields</th>
<th>Explanation/Function of the fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>CIB (Committee Internal Ballot)</td>
</tr>
<tr>
<td></td>
<td>CIB-ActivPWI (Activation of a Preliminary Work Item)</td>
</tr>
<tr>
<td></td>
<td>CIB-AdopPWI (Adoption of a Preliminary Work Item)</td>
</tr>
<tr>
<td></td>
<td>CIB-AdopFV (Adoption of the final draft for Formal Vote)</td>
</tr>
<tr>
<td></td>
<td>CIB-NWI (Adoption of a New Work Item)</td>
</tr>
<tr>
<td></td>
<td>CIB-9mthTol (3 year time frame for the development of EN, TR &amp; TS – 9 months Tolerance Request)</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Ballot stages</td>
</tr>
<tr>
<td><strong>Reference/Title</strong></td>
<td>Ballot reference number or document title element.</td>
</tr>
<tr>
<td><strong>Committee</strong></td>
<td>Only those committees to which your profile is registered will be displayed.</td>
</tr>
<tr>
<td><strong>Opening date</strong></td>
<td>Specifies that the date in the range between &quot;From&quot; and &quot;To&quot; is an opening date.</td>
</tr>
<tr>
<td><strong>Closing date</strong></td>
<td>Specifies that the date in the range between &quot;From&quot; and &quot;To&quot; is a closing date.</td>
</tr>
<tr>
<td><strong>From</strong></td>
<td>Range start date</td>
</tr>
<tr>
<td><strong>To</strong></td>
<td>Range end date</td>
</tr>
</tbody>
</table>

*Figure 15 – Search parameters*

### 3.3 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.
3.4 Viewing the details of a ballot

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

![List of ballots](Image)

Click on the ballot reference name to open a specific ballot

List of ballots

This will open the Ballot details screen:

![Figure 16 - Open ballot details](Image)

The ballot contains tabs with the following information:

<table>
<thead>
<tr>
<th>Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Lists the ballot attributes, the reference documents or hyperlinks, questions and vote values.</td>
</tr>
<tr>
<td>Result</td>
<td>Lists the ballot result with the number of answers for each question and the comments received. Includes link to download the results.</td>
</tr>
<tr>
<td>Participation</td>
<td>Lists of ballot owners and voters. This tab is only visible to the Secretary and support team (ballot owner).</td>
</tr>
<tr>
<td>Audience</td>
<td>Lists the complete ballot audience. This tab is only visible to the Secretary and support team (ballot owner).</td>
</tr>
</tbody>
</table>

![Figure 17 - Ballot Information screen](Image)

![Figure 18 – Tabs in ballot details screen](Image)
3.5 Tools Menu

The tools menu provides shortcuts to access different functions of the electronic balloting application:

![Figure 19 – Tools menu](image)

The following options are available within the **Tools** menu:

<table>
<thead>
<tr>
<th>Tools menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balloting Portal</td>
<td>Electronic balloting Portal start page.</td>
</tr>
<tr>
<td>Open Ballots (same as tab All Open)</td>
<td>This function displays all the open ballots to which a user is registered.</td>
</tr>
<tr>
<td>Search</td>
<td>Direct link to the <strong>Search</strong> tab.</td>
</tr>
<tr>
<td>CENTC Committee areas</td>
<td>Direct link to the CENTC server (<strong>eCommittee</strong>).</td>
</tr>
</tbody>
</table>
Tools menu  |  Description
--- | ---
Manage my roles | This function displays all the roles of a user. It allows the user to disable certain roles temporarily and, thereby, to display only ballots corresponding to the remaining role(s). Roles can also be re-enabled. Enabling and disabling of roles has no effect on the registration of business roles in the Global Directory. Moreover, it lasts only until logging out from the current session: at the next login, all roles available to the user as defined in the Global Directory are enabled by default.

<table>
<thead>
<tr>
<th>Committee Internal Balloting</th>
<th>Balloting Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Committee Internal Balloting screenshot" /></td>
<td></td>
</tr>
</tbody>
</table>

- **OK**: confirms the enabled/disabled roles
- **Disable All**: disables all the roles
- **Enable All**: enables all the roles
- **Reload**: enables all the roles available to the user as defined in the Global Directory

Log out | Allows the user to Logout from the balloting system and from Livelink.

**Figure 20 - Tools menu options**

### 3.6 Help Menu

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

**Figure 21 - Help Menu**
4 Creating a new ballot

[Ballot Owner]

4.1 Create an Ad-Hoc ballot

From the drop-down menu "New Ballot" on the Committee Internal Balloting screen, choose the option ‘Ad hoc Committee Internal Ballot’

This will launch a 4-step wizard that will help you creating the Ad Hoc Committee Internal ballot.

**Step 1 – Committee selection**

This step allows you to select the committee for which you wish to create a CIB ad-hoc ballot. Select the committee from the drop-down list:

![Figure 22 - Create an Ad hoc Committee Internal Ballot](image)

![Figure 23 - Committee selection](image)

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

Click the **Next** button.
Step 2 – Ballot information

This step allows you to enter the ballot's metadata, i.e. ballot reference, title, start date, and end date. Fill in all the required fields.

The system proposes by default a 3-month duration for the ballot, but you are free to modify it.

The fields marked with an asterisk * are mandatory and must be filled in.

There are no patterns or naming conventions imposed for any of these fields.

Note that you can edit the metadata at any time after the ballot has been created.

Figure 24 - Ballot Metadata
The Ballot Reference should be as explicit as possible as it is the reference used to search for your ballot in the electronic balloting platform.

Click the Next button.

Step 3 – Questions & Answers

The ad-hoc ballot allows you to define the questions and answers you wish to ask. In this step, you will define the set of questions and answers for the ballot.

Define questions
- Define the question in the textbox.

Figure 25 - Ballot metadata fields

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference</td>
<td>Ballot reference or document title.</td>
</tr>
<tr>
<td>Title</td>
<td>Title of in English.</td>
</tr>
<tr>
<td>Opening date</td>
<td>Vote opening date</td>
</tr>
<tr>
<td>Closing date</td>
<td>Vote closing date</td>
</tr>
<tr>
<td>Notes</td>
<td>Any notes relevant to the ballot.</td>
</tr>
</tbody>
</table>

Figure 26 - Define question

Define question
Type the text of your question here
Define answers

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

Some information about the different types of comment options available:

<table>
<thead>
<tr>
<th>Comment options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No comment allowed</td>
<td>Balloter cannot add comment on selected answer.</td>
</tr>
<tr>
<td>Comment optional</td>
<td>Balloter can add comment on selected answer. Comment option include HTML window and/or document upload.</td>
</tr>
<tr>
<td>Comment required (HTML window)</td>
<td>Balloter must add a comment to selected answer. Comment option include HTML window only.</td>
</tr>
<tr>
<td>Comment required (using CEN commenting template)</td>
<td>Balloter must add a comment using the CEN commenting template. Comment option include document upload only.</td>
</tr>
<tr>
<td>Comment required (HTML window or CEN commenting template)</td>
<td>Balloter must add a comment using the CEN commenting template. Comment option include document upload and HTML window.</td>
</tr>
</tbody>
</table>

![Figure 28 - Comment field options](image)
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.

To add another answer, click the button Add answer

To define answers, type a possible answer in the textbox

To change the order of answers, select the option for commenting an answer

To delete, move up or down an answer, open the function menu () and select the desired option
Once ready, click the **Create** button. The ballot creation is confirmed by a pop-up window as soon as you clicked **Create**.

![Ballot successfully created](image)

**Figure 32 – Ballot creation confirmation message**

**Step 4 – Reference documents**

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

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

![Add new reference document](image)

**Figure 33 – Add new reference document**

In both cases, you have to identify a reference for the document you wish to load. Choose the document from your local system or insert/paste a hyperlink into the second window. Note that you can apply both methods of adding documents into one ballot.
Add New Reference document screen:

![Add new reference document screen](image)

Figure 34 – Add new reference document screen

Add New Link screen:

![Add URL Reference](image)

Figure 35 – Add new link screen

- Click on Submit.

Click on the Finish button to terminate the wizard.

The CIB ballot has been successfully created, with the reference document and will open automatically on the defined Start date.
4.2 Create a ballot based on a template

In the CIB balloting section, click on **New Ballot** and in the drop-down menu that appears select one of the following ballot templates:
- 3YTF for development EN, TR & TS – 9 mth Tolerance Request
- Activation of a Preliminary Work Item
- Adoption of a New Work Item
- Adoption of a Preliminary Work Item
- Adoption of the final draft for Formal Vote

This will launch a 4-step wizard that will help you creating the ballot.

**Step 1 – Committee selection**

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

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

Click the **Next** button at the bottom of the page.
Step 2 – Ballot information

This step allows you to enter the ballot's metadata, i.e. ballot reference, start date, and end date. Fill in all the required fields.

The system proposes by default a 1-month duration for the ballot, but you are free to modify it.

![Image of Ballot Metadata](image)

Figure 38 - Ballot Metadata
<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference</td>
<td>Ballot reference or document title.</td>
</tr>
<tr>
<td>Title</td>
<td>English title</td>
</tr>
<tr>
<td>Opening date</td>
<td>Vote opening date</td>
</tr>
<tr>
<td>Closing date</td>
<td>Vote closing date</td>
</tr>
<tr>
<td>Notes</td>
<td>Any notes relevant to the ballot.</td>
</tr>
</tbody>
</table>

Figure 39 - Ballot Metadata fields

Click the **Next** button.

**Step 3 – Questions & Answers**

This step displays the set of questions and answers that will be proposed during the ballot. Since the ballot is based on a template for the questions and answers, you cannot change any of them.

Figure 40 - Questions & Answers

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

*Note that until you click the **Create** button, you can go back in the process anytime 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 link to the ballot any reference document(s).

Open the function menu ( ) next to Reference document and links and select one of the two options: Add new reference document or Add new link.

In both cases, you have to identify a reference for the document you wish to load. Choose the document from your local system or insert/paste a hyperlink into the second window. Note that you can apply both methods of adding documents into one ballot.
Add New Reference document screen:

![Add New Reference document screen](image)

**Figure 43 – Add new reference document screen**

Add New Link screen:

![Add New Link screen](image)

**Figure 44 – Add new link screen**

- Click on Submit.

Click on the Finish button to terminate the wizard.

The CIB ballot has been successfully created, with the reference document and will open automatically on the defined Start date.
4.3 Create a new ballot by cloning an existing ballot

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 metadata (reference, title, start and end date, etc.) and will be able to edit the copied questions and answers (if the ballot is of the type ad-hoc CIB).

It is recommended to only clone ad-hoc ballots and not any other type, i.e. do not clone ballots based on templates!

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 (copy questions & answers).

![Figure 45 – Clone this ballot function](image)

The following message is displayed:

![Figure 46 – Message displayed when cloning ballot](image)
Click on OK to confirm the cloning.

Click on Cancel to cancel the cloning.

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

When cloning a ballot, reference documents are not copied.

5 Editing existing ballots

[Ballot Owner]

Existing ballots can be modified by the ballot owner at any time as long as the ballot has not closed from the Ballot Information screen.

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 metadata

To update ballot metadata, i.e. ballot reference, title, start date and end date, click on the function menu () next to ballot reference and select Edit.

![Figure 47 - Editing Metadata](image-url)
Modify any of the metadata as appropriate and click **Submit** to finish editing:

**Figure 48 - Update ballot metadata**

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

<table>
<thead>
<tr>
<th>Ballot Status</th>
<th>Explanation</th>
<th>Visibility of the ballot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>The ballot has been created by the Secretary/Support Team (completion of stages 1 to 3 of the ballot creation process)</td>
<td>Secretary/Support Team only</td>
</tr>
<tr>
<td>Open</td>
<td>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</td>
<td>Balloter/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</td>
</tr>
<tr>
<td>Closed</td>
<td>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</td>
<td>Balloter/Commenter: Ballot information and ballot document(s); Voting results Secretary/Support Team: Same as balloter/commenter</td>
</tr>
</tbody>
</table>

**Figure 49 – Ballot Status**
5.2 Modify attached files

Figure 50 - Committee internal balloting – Information tab

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

Figure 51 - Update Reference documents and links
1 – Add new reference document:

Allows you to add a new document to the ballot.

2 – Add new link

To attach the link to the document, do as follows:

- select the option **Add new link**

![Figure 52 - Add new link](image)

- Give a name to the URL and paste the link to the documents into the URL field.

![Figure 53 - Add URL Reference](image)

- Click on **Submit**.
5.3 Modify questions/answers (only available for Ad hoc CIB)

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

To update the questions/answers of an Ad hoc CIB ballot, click on the function menu () next to Questions and answers and click on Edit.

For detailed instructions on how to edit questions and answers, please refer to section Create an AD-hoc ballot; Step 3 – Questions & Answers.

6 Voting and commenting

[Voters, Commenters]

First select the ballot in the My ballots screen (or via the Search function described in §3.2).

The ballot opens and the following screen with ballot metadata and attached ballot documents (if there are any) is displayed. In order to cast a vote, click on Add New Item and select Cast vote for. To download a file, click on the file name.
Screen areas for

- Ballot metadata
- Ballot document(s)
- Ballot question(s) & answers
- Voting & commenting

Figure 56 - Questions & Answers

6.1 Casting a vote

[Voter]

Click on **Cast Vote**.

Figure 57 – Cast vote

Figure 58 – Vote screen
A ballot can contain more than one question with associated answers. Choose a vote value from the dropdown menu for the corresponding question and enter – if required or needed – any comment in the Comment-window or by submitting a file containing all your comments.

Once you have voted (+ added comments if required), click on Cast vote to confirm the vote. If you click on Reset, the vote options you have just entered will be removed. If you click on Cancel, you come back to the ballot screen without validating the vote.

![Figure 59 – Vote cast](image)

After having cast a vote, the name of the balloter who cast the vote, is displayed in the list of the Ballot Information Tab, together with the date of this action.

### 6.2 Submitting a comment

[Commenter]

Click on Submit Comment.

![Figure 60 – Submit Comment](image)
You have the possibility either to enter your comment directly on the screen or to upload a comment file. To add a comment file, click on **Browse**... and select your file.

Once you have submitted your comment, click on **Submit comment** to confirm your comment.
If you click on **Reset**, the comment you have just entered will be removed.
If you click on **Cancel**, you come back to the ballot screen without validating the comment.

After having submitted a comment, the name of the commenter is displayed in the ‘*Cast by*’ column on the *Ballot information* Tab, together with the date of this action.

**Note:** If the comment is modified, the name of the person who has last modified the comment is displayed.
6.3 Modifying a vote or comment

[Voter] / [Commenter]

A voter/commenter can edit a vote/comment as long as a ballot is open.

From the My Ballots screen, click on the ballot reference for which you wish to modify your vote/comment. Click on the Functions-menu arrow on the right of the vote/comment and select the option “Add version”.

![Figure 63 – Add version](image)

This will display the Vote/Comment screen again and will allow you to choose another vote option, modify your comment and/or modify or delete your comment file.

![Figure 64 – Vote/Comment screen](image)

Once you have modified your vote/comment, click on Cast vote/Submit comment to confirm the modification.

If you click on Reset, the options you have just entered will be removed.
If you click on Cancel, you come back to the ballot screen without validating the vote/comment.
**Note:** To browse the different versions of a vote/comment, select the “**Versions**” option in the function menu of the vote.

![Figure 65 – Versions](image)

The screen will show all the successive versions.

![Figure 66 – Vote/comment versions](image)

### 6.4 Deleting a vote or comment

[Voter] / [Commenter]

A voter/commenter can delete a vote/comment as long as the ballot is open.

From the **My Ballots screen**, click on the ballot reference for which you wish to delete your vote/comment. Click on the **Functions**-menu arrow on the right of the vote/comment and select the option "**Delete**".

![Figure 67 – Delete function](image)
The system will ask you to confirm the deletion.

![Deletion confirmation message](image)

Figure 68 – Deletion confirmation message

Click on OK.

![Warning](image)

This option should be used with caution, and only in exceptional circumstances, as it completely destroys the existing Vote/Comment object.

### 6.5 View the ballot audience

[Ballot Owner]

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

![Ballot audience](image)

Figure 69 - Ballot audience
The **Audience** tab lists all the individuals having a balloting role in the 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.

### 6.6 Cast a vote on behalf of someone else

[Ballot Owner]

A ballot owner has the possibility to cast a vote on behalf of any participant.

Selecting the option “**Cast vote as**” opens the relevant Vote screen.

![Figure 70 - Cast a vote as](image)

The next screen will allow you to first select the Member Body 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.
6.7 Submit a comment on behalf of someone else

[Ballot Owner]

A ballot owner has the possibility to submit a comment on behalf of any participant.

Selecting the option “Submit Comment as” opens the relevant Vote screen.

The next screen will allow you to first select the participant on behalf of which you will submit a comment, and then add a comment and/or a file. Click on the Submit comment button to register the comment.
6.8 Add a vote after the ballot has been closed

[Ballot Owner]

As the Secretary of a committee or a member of the support team, you can re-open a ballot that has closed in order to cast a last minute vote on behalf of a NSB or WG expert. 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)
On the next screen, set the status field to **Open** and then click **Submit**:

![Figure 75 - Edit Ballot Status](image)

You will be taken back to the ballot.

**Step 2: Cast the vote**

From the **Add item menu** on the top right of the screen, select **Cast vote as** and enter the vote as explained in section **Cast a vote on behalf of someone else**.

**Step 3: Close the ballot**

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

### 7 Process voting results and comments

[All]

#### 7.1 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 ![Zip icon](image)) .

![Figure 76 - Download ballot results/comments](image)
Browse the content of the extracted folder on your computer (result of voting/index.pdf, Comment files).

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>CommentFiles</td>
<td></td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>index.pdf</td>
<td></td>
<td>Adobe Acrobat D...</td>
<td>7 KB</td>
</tr>
<tr>
<td>index.rtf</td>
<td></td>
<td>Rich Text Format</td>
<td>48 KB</td>
</tr>
</tbody>
</table>

Figure 77 - Extracted folder

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

In your internet browser, go to http://cen.iso.org, folder Guides to CEN IT applications. Here you find the user guides to all CEN electronic applications. Select 03 – Support to decision making, then CEN-ISO Commenting Template and Comment Collation Tool.

![Comment Collation Tool](image)

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

8 Helpdesk information

[All]

For e-balloting application issues (e.g. technical issues, functionalities, support...), please contact our helpdesk at ISO: helpdeskcentc@iso.org.

Online documentation and support document on the use of the balloting application is available under Help.

![Help menu](image)