NATIONAL eBALLOTING- QUICK START GUIDE

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

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

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

Simpler consensus building, better voting performance, increased efficiency

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

1. **National Committee Internal Ballot (NCIB)**
   
   **Aim:** Voting on national standards

2. **National Positioning Ballot (NPOS)**
   
   **Aim:** Gaining national consensus before voting on an international or regional standard.

It provides information about ISO and/or CEN ballots relevant to each national committee.
Summary of Key features:

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

- Mapping between national and international/regional committees is set in the Global Directory (via NMC)
- Manually or automatically create new ballots
- Questions and possible answers and reference documents of source ballot are automatically copied
- Possibility to use pre-defined ballot templates to translate international or regional English ballots into locale language
- Automatic notifications sent to the ballot audience
The **Home page** displays a list of all ballots, which you are allowed to view depending on the roles assigned in the ISO Global Directory.

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

View ballots using the balloting tabs.

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

<table>
<thead>
<tr>
<th><strong>Search Fields</strong></th>
<th><strong>Explanation/Function of the fields</strong></th>
</tr>
</thead>
</table>
| **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 |
VIEW THE DETAILS OF A BALLOT

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

List of ballots

Click on the ballot reference name to open a specific ballot.

The ballot contains tabs with the following information:

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

**Notes:** The Participation and audience tabs are only visible by the Secretary and SST.
CREATE A BALLOT

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

Click on **Ballot** and in the drop-down menu select the relevant ballot type.

Ballot templates are managed by your National Member Body

**STEP 2:** Follow the 4-steps wizard to create your ballot
EDIT A BALLOT

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

No notifications are sent after a change has been made.

To modify the ballot information, click on the function menu ( ) next to the ballot Reference.

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

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

Back to list of ballots.
CAST A VOTE / SUBMIT A COMMENT ON BEHALF OF A VOTER

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

Select the answer to each question

Select from the drop down list the committee member

Committee: AENOR/NEB 361
Status: Open
Opening date: 2015-04-22
Opened on: 2015-04-22 12:09
Project reference:
Pending phase: yes

Type: NCIB (National Committee Internal Ballot)
Closing date: 2015-04-27
Voting closed on: 2015-04-22 12:12
**APPROVE/DISAPPROVE BALLOT RESULTS**

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

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

1. **Ballots with a pending phase:**
   - Click on the **Pending Result** tab

2. **Ballots without a pending phase:**
   - In the **Information** tab, click on the function menu next to the ballot reference and select **Edit**

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

1. Select the ballot result approval as appropriate
2. Enter your explanation
3. Close the ballot
DOWNLOAD BALLOT RESULTS

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).

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**Electronic Balloting**

Reference: ISO/CD 105-F10
Committee: AEN/TC test 1
Status: Closed
Opening date: 2012-10-09
Closing date: 2012-12-04

**Download**

Download voting result and comments as a zip file

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Click on **Extract**
There are two cloning functionalities:

**Simple Cloning**
- Copy the ballot questionnaire only

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

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

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

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