Electronic Balloting Portal Societal Stakeholder Organizations Opinion Mechanism Digitization

User guide

Version	Date	Author	Modifications description
0.1	2024-02-28	TL	Initial version
1.0	2024-04-02	TL	Revised version (SSO results in separate folder)

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1   Introduction

<u>Important Preliminary Note :</u>

With the introduction of the new method for submitting opinions via eBalloting, Societal Stakeholders Organization (SSO) will now have the option to submit both Comments and Opinions. It is important to note that Comments and Opinions are distinct entities: Opinions do not influence the ballot outcome, challenge consensus-building, or alter the national delegation principle. Therefore, a clear differentiation between Opinions and Comments exists.

➢ **Commenters, appointed by an SSO Organization (ANEC, ECOS & ETUC)**

1.1 Main stages in the balloting process

The Balloting process and opinion mechanism and its follow up are characterized by the following main stages:
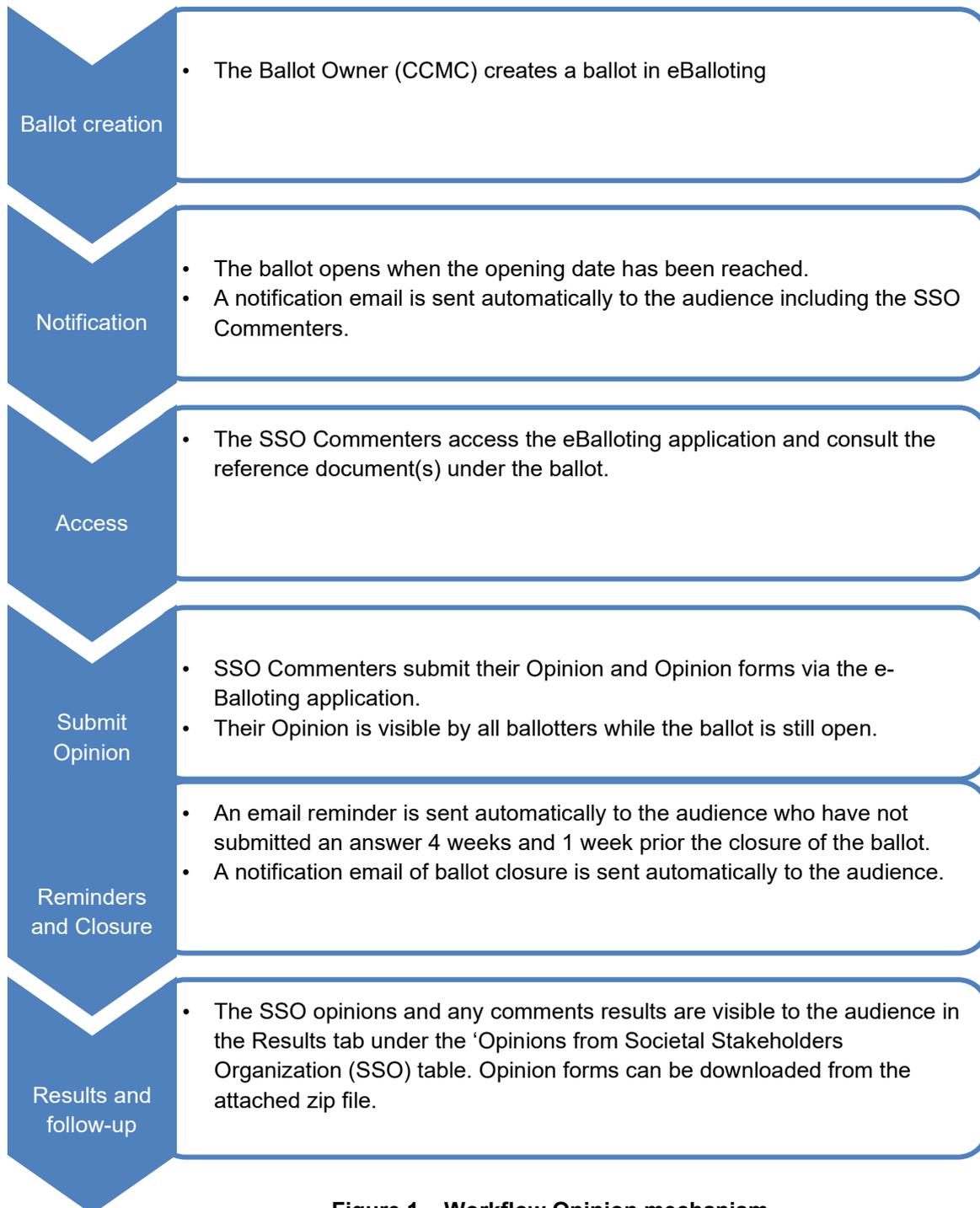
Ballot creation
- The Ballot Owner (CCMC) creates a ballot in eBalloting

Notification
- The ballot opens when the opening date has been reached.
- A notification email is sent automatically to the audience including the SSO Commenters.

Access
- The SSO Commenters access the eBalloting application and consult the reference document(s) under the ballot.

Submit Opinion
- SSO Commenters submit their Opinion and Opinion forms via the e-Balloting application.
- Their Opinion is visible by all ballotters while the ballot is still open.

Reminders and Closure
- An email reminder is sent automatically to the audience who have not submitted an answer 4 weeks and 1 week prior the closure of the ballot.
- A notification email of ballot closure is sent automatically to the audience.

Results and follow-up
- The SSO opinions and any comments results are visible to the audience in the Results tab under the 'Opinions from Societal Stakeholders Organization (SSO) table. Opinion forms can be downloaded from the attached zip file.

Figure 1 – Workflow Opinion mechanism

1.2 Principles of the Electronic Balloting application

1.2.1 Permissions to submit an opinion

Authorized to **submit an Opinion** (with the associated Opinion form when needed) are the Commenters appointed by an SSO Organization (ANEC, ECOS, ETUC) in the Global Directory.

1.2.2 Management of users and their balloting roles

Users are registered in the **Global Directory** in the roles of Commenter. Users and their roles are registered and maintained by CCMC in the Global Directory.

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

In addition to the role of a Commenter, there are other balloting related roles defined in the application which are associated with certain permissions (see details in § 1.2.3).

1.2.3 General 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.

Balloting roles	Role definitions	Permissions
Ballot Owner	Responsible to initiate and run the balloting process. This role is assumed by CCMC staff for the Enquiry.	Can create a ballot, has full access to the balloting environment. A BallotOwner has also the permission to register a vote, comment and opinion in the balloting application on behalf of a **Voter or Commenter** (if required).
Voter	Person representing a CEN member organization who is authorized to vote on behalf of his/her national member organization.	Can cast a vote on all Enquiries for committees to which he is assigned as Voter.
Commenter	Societal Stakeholder Organizations, CEN Consultant, some external organizations (Associates, Affiliates, EC, EFTA, …) : are allowed to post comments on Reference Documents, but not to vote.	Commenter can submit a comment on a vote. SSO Commenters can submit a comment on a vote and submit an opinion and add an Opinion form to the opinion.
Monitor	Person representing an organization who has read/viewer-access to all or a subset of the consultations relevant for its organization without having the permission to cast, modify or delete an answer/comment him/herself. This role may also be used to give access to the results when voting is closed.	In *Open* state, can see consultations and questions asked. When ballot is *closed*, can see all answers cast and final result..

Figure 2 – Internal balloting roles

2 Access to the Application

2.1 Ballots on Draft Standards Access

2.1.1 Access through CEN Electronic Applications homepage

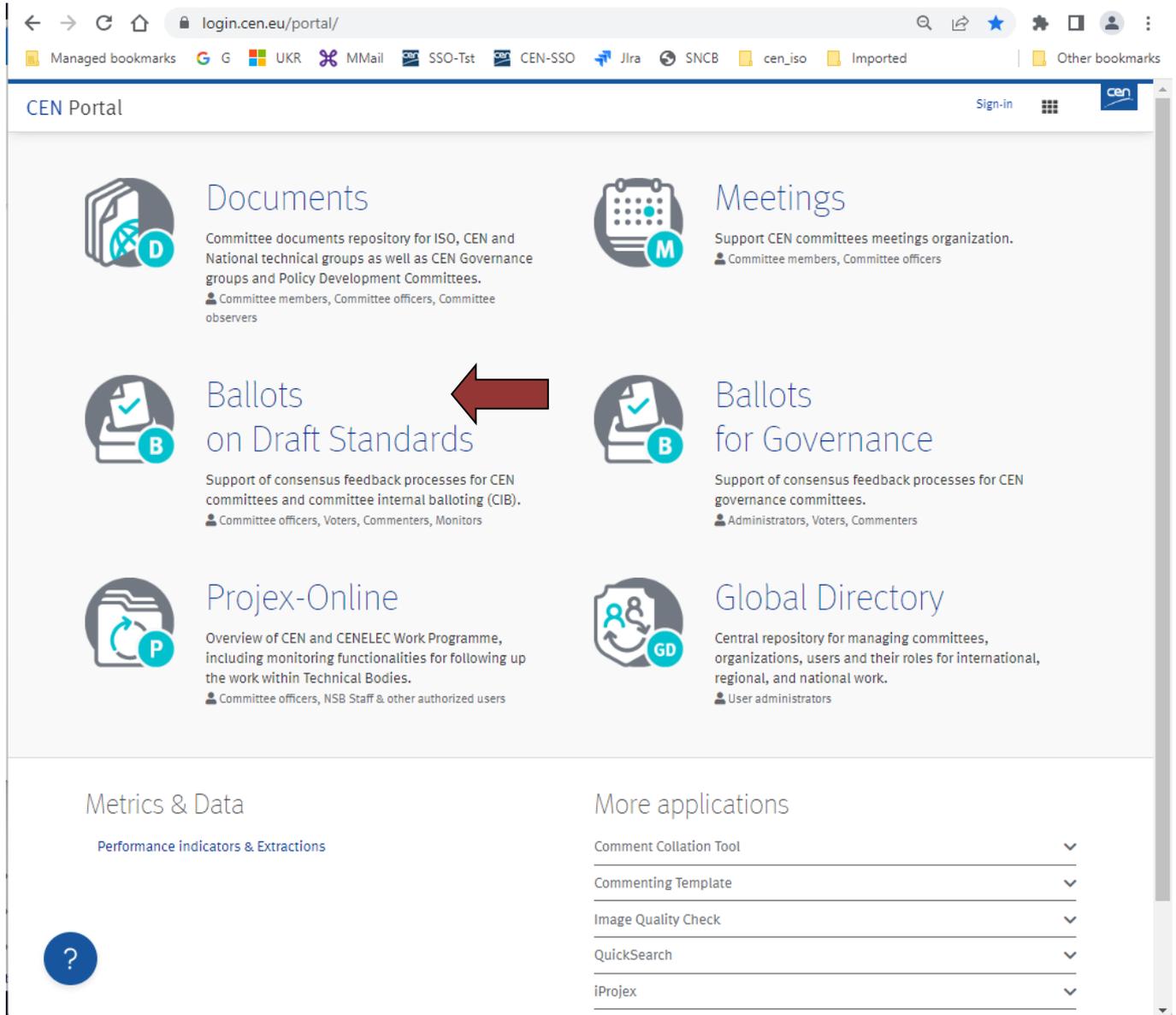Sign-in to the CEN Applications Portal at http://login.cen.eu, and select the [Ballots on Draft Standards] option :

Figure 3 – CEN Applications Portal

Then, in the CEN Portal, select the first option [**Electronic Balloting for CEN Enquiry**] :

Figure 4 - Electronic Balloting Portal

2.1.2 Access directly from TC/SC homepage in CEN Committees

Alternatively, you can also directly access your ballot by clicking in the corresponding widget on the homepage of your TC/SC in the CEN Documents environment.
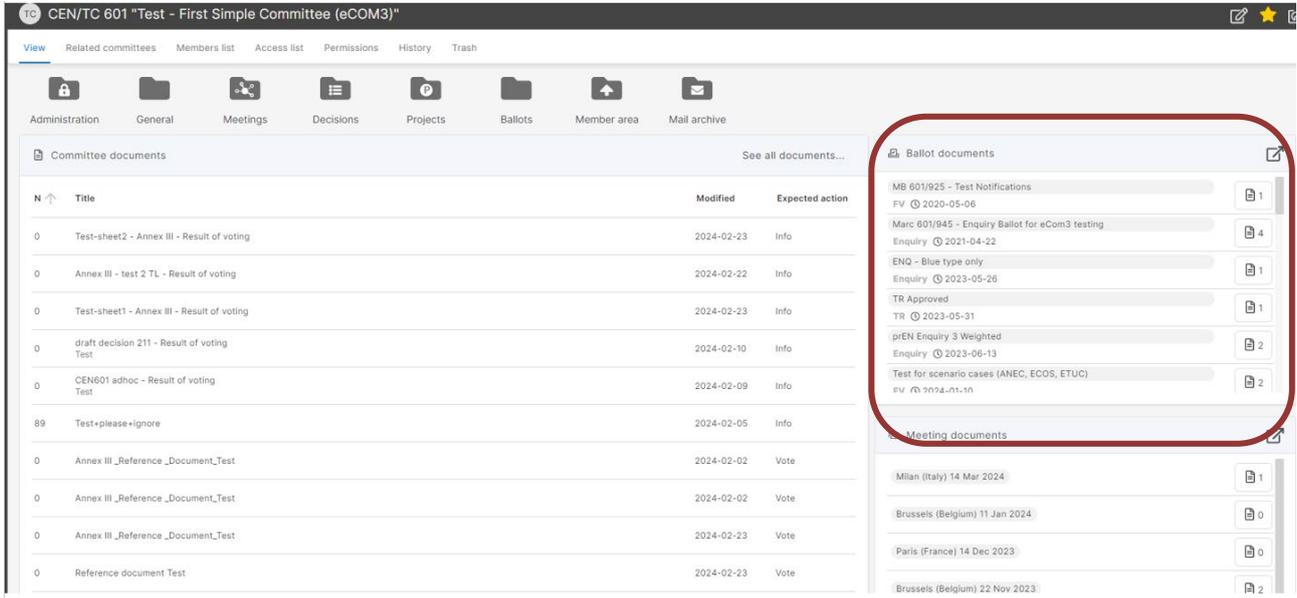
Figure 5 - Access from Working Group home page

2.2 Logging in

Your username and password will be sent to you by e-mail after your initial registration by CCMC (Data Service) in the Global Directory. 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.

If you are not already logged in the CEN/ISO Federation :

a) In the CEN Applications Portal, click on **Sign in**
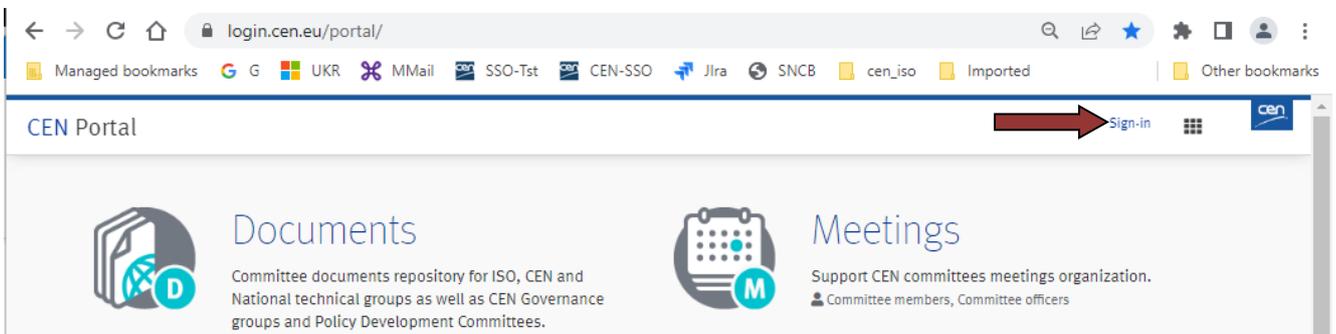
Figure 6 - Sign into applications

b) Enter your username and password to access the Standardization Identity Federation :

Figure 7 – CEN/ISO Federation Log-in screen

Note : depending on your environment, this screen may be slightly different.

c) If the declaration on **Acceptance of Terms and Conditions** appears, please read it and tick the box to accept the conditions

Figure 8 - CEN Electronic Applications Log-in screen

You are Signed In !...

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

2.3 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 – Logout link

2.4 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.
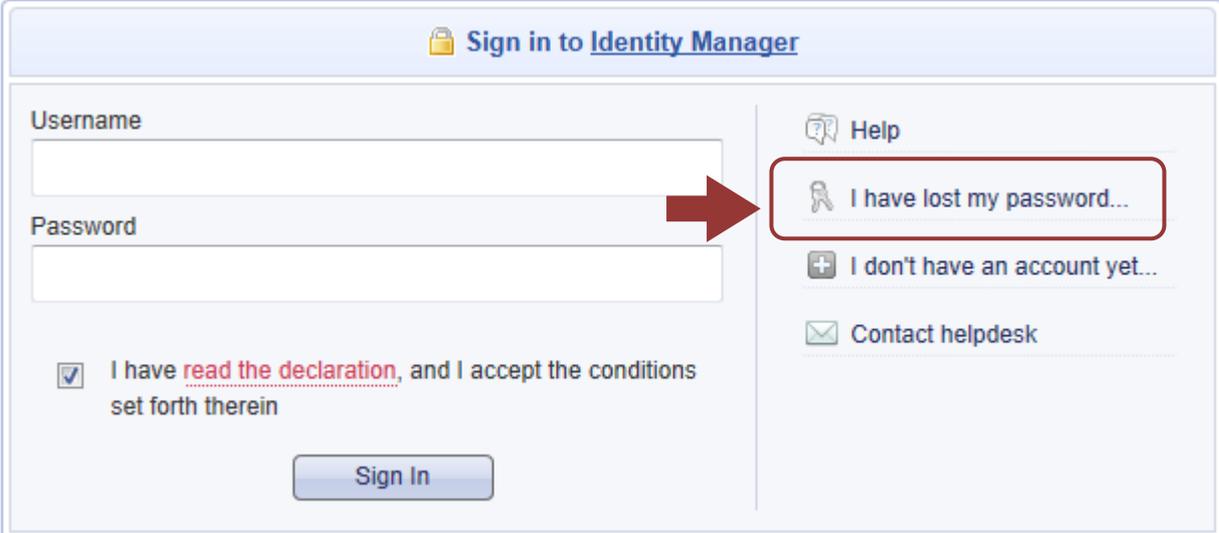
Figure 10 – Password forgotten

3 User interface and navigation

3.1 Ballots - Navigation

The **Electronic balloting for CEN Enquiry and Electronic Balloting for CEN FV/UAP** display a list of all currently open ballots, which you are allowed to view depending on the roles assigned in the Global Directory.

Figure 11 – CEN Enquiry 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.

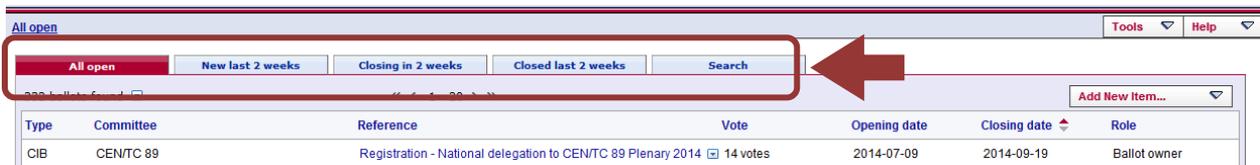The tabs at the top of the page have the following functions (from left to right):

Figure 12 – e-Balloting tabs

Tabs	Description
All open	Displays all the Ballots which are currently open and for which you can submit a comment and an Opinion.
New last 2 weeks	Displays all the Ballots which were opened within the last 2 weeks.
Closing in 2 weeks	Displays all the open Ballots which will close during the next 2 weeks.
Closed last 2 weeks	Shows all the Ballots which closed during the last 2 weeks. It allows access to the closed Ballots and the results and comments submitted by the voters

Tabs	Description
	and commenters.
Search	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).

Figure 13 - Ballot tabs functions

3.2 Searching for Ballots

The Search screen allows you to enter parameters into the search fields to find the ballot 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:

Search Fields	Explanation/Function of the fields
Type	Enquiry
	If you selected the generic e-Balloting link in the Portal, and depending on

Search Fields	Explanation/Function of the fields
	your roles, you might see here other Balloting types (**Enquiry**, **FV**, **CIB**, …)
Status	Ballot stages
Reference/Title	Ballot reference number or document title element. _Notes_: - _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")._ - not case-sensitive.
Committee	Only those TCs to which your profile is registered will be displayed.
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 start date
To	Range end date

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

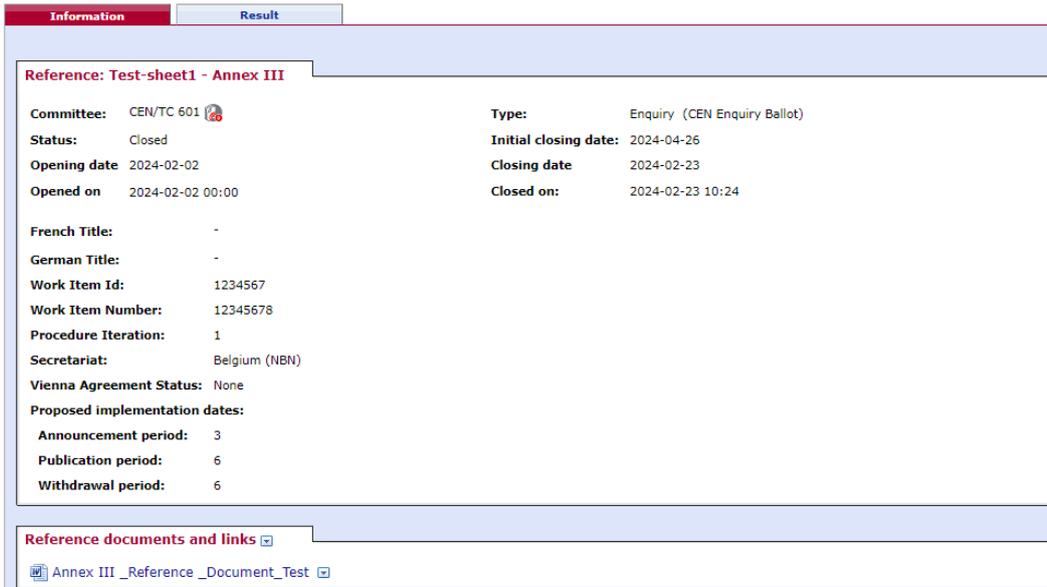From the search screen, click on the ballot reference to open the ballot details screen :

Figure 16 - Ballot Information screen

Tabs	Description
Information	Lists the ballot attributes, the reference documents or hyperlinks, questions and vote values.
Result	Lists the ballot results with the number of answers for each question and the comments received. Includes link to download the results.

Figure 17 – Tabs in ballots details screen

3.5 Tools Menu

The tools menu provides shortcuts to access different functions of the electronic balloting application :
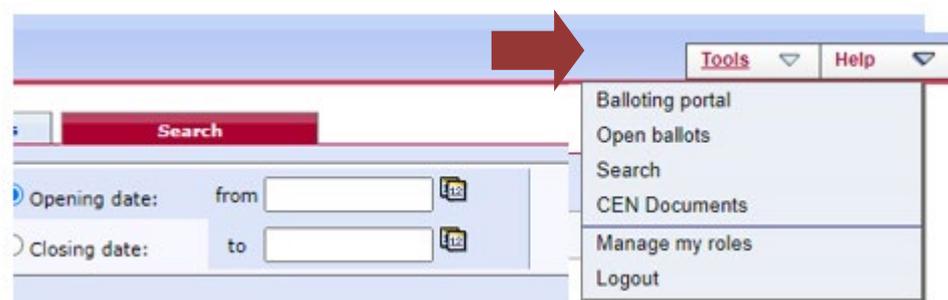
Figure 18 – Tools menu

3.6 Help Menu

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

Figure 19 - Help Menu

4   Submitting an Opinion

4.1 Ballot selection

First select the ballot in the Ballot selection screen

Figure 20 – select ballot

Note: For **Open** ballots, the info displayed under the column '**Vote**' is only an indication that your own organization has either casted a comment or submitted an opinion.

4.2 Submit an Opinion on the ballot

Select the 'Submit Opinion' tab on the righthand side of the page.

Figure 21 – Submit opinion

4.3 Submitting an Opinion

The ballot opens and the following screen is displayed. Choose a result value from the dropdown menu and upload - if required- your Opinion form in the Comment-window
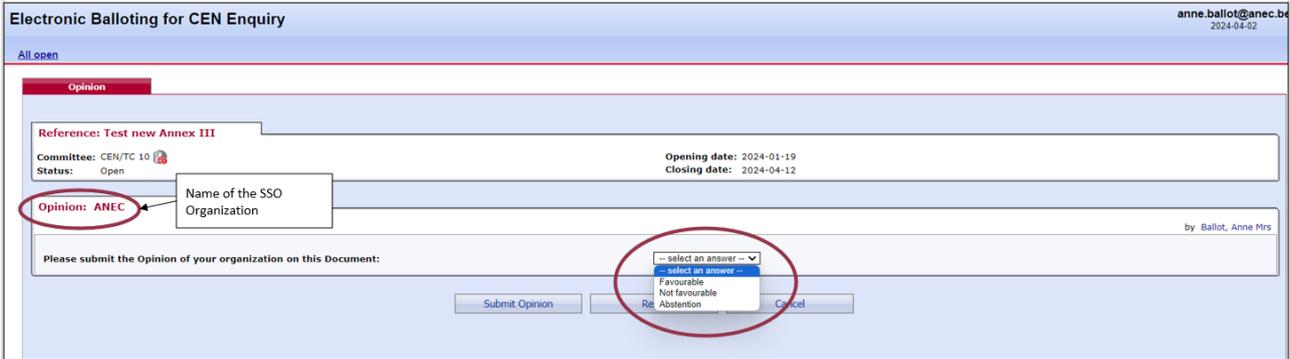

Figure 22 – Answer screen

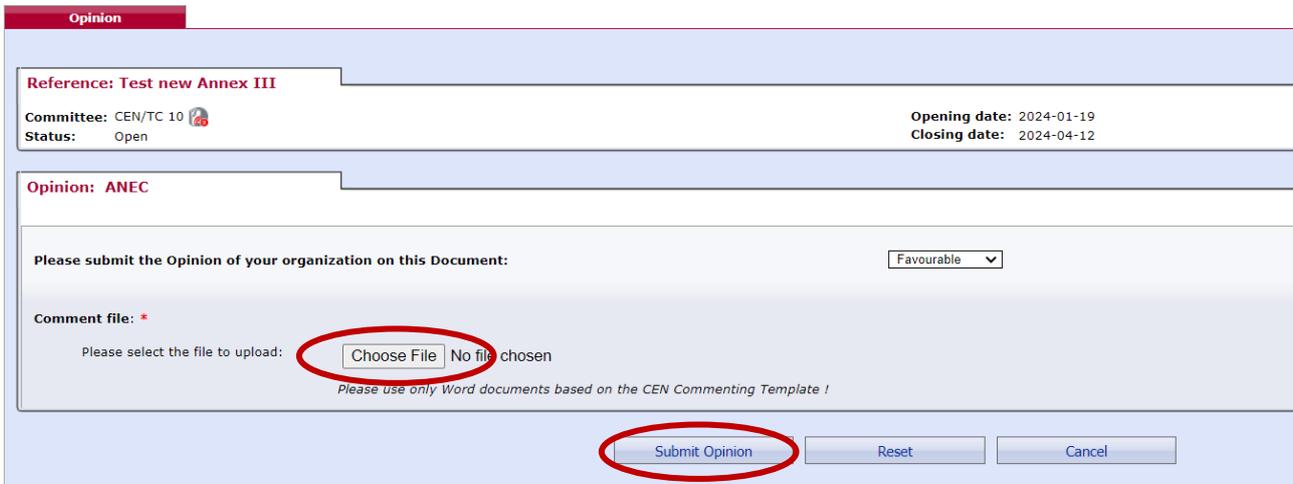For both 'Favourable' and ' Not Favourable', commenters are required to upload their Opinion form.

Figure 23 – Answer submitted

Once you have submitted your opinion, click on Submit **Opinion** to confirm your answer.

If you click on **Reset**, the vote options you have just entered will be removed.
If you click on **Cancel**, you comeback to the ballot screen without validating the opinion.

After having submitted an opinion, the name of the Commenter who submitted the opinion, is displayed in the new **Societal Opinions** table on the [Information] tab, together with the date of this action.

Figure 24 – Opinion visibility

4.4 Modifying an Opinion

A commenter can edit an answer as long as the ballot is open.

From the **My Ballots screen,** click on the ballot reference for which you wish to modify your comment. Click on the **Functions**-menu arrow ▾ on the right of the opinion in the Societal Opinions table and select the option "**Add version**".

Figure 25 – Add version

This will display the Opinion screen again and will allow you to choose another answer and/or upload another Opinion form.

Once you have modified your Opinion, click on **Submit opinion** 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 opinion.

Note : To browse the different versions of an opinion, select the "**Versions**" option in the function menu of the vote. This screen will allow you to see all successive versions.
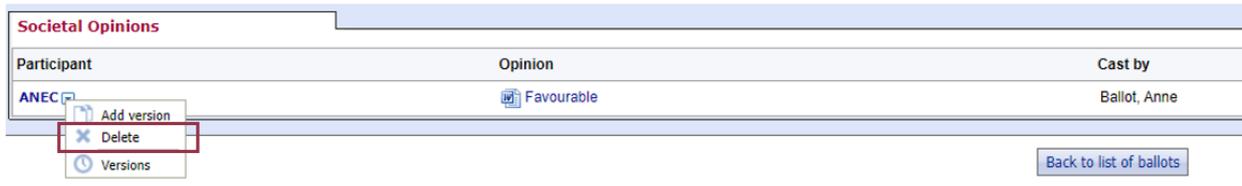
Figure 26 – Versions

4.5 Deleting an Opinion

A commenter can delete an opinion as long as the ballot is open.

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

Figure 27 – Delete function

The system will ask you to confirm the deletion.
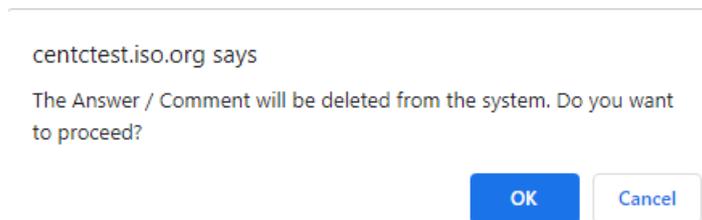
Figure 28 – Deletion confirmation message

Click on *OK*.

⚠️ **This option should be used with caution, and only in exceptional circumstances, as it completely destroys the existing Answer object.**

5 Process voting results, comments and opinions

5.1 Download the ballot results/comments/opinions (ZIP file)

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

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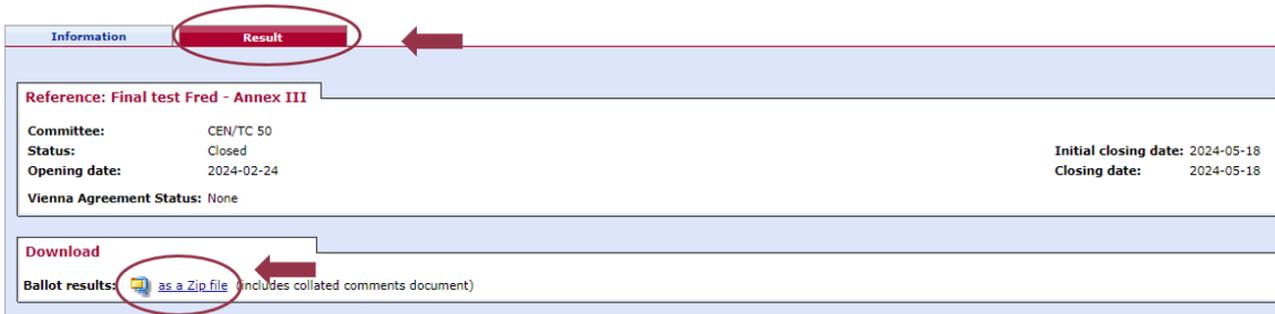

Figure 29 - Download ballot results/comments/opinions

Browse the content of the extracted folder on your computer (result of voting, Comment files, Societal Opinion files).

Figure 30 - Extracted folder

6 Helpdesk information

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.*

Figure 31 – Help menu