



Electronic Balloting Portal WG Consultations

User guide

Version	Date	Author	Modifications description
0.1	2023-06-28	MB	Initial version
0.2	2023-07-05	MB	First version uploaded (Partial)
1.0	2023-07-10	MB	First official version

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1 Introduction

Important Preliminary Note :

Working Group Consultations are informal consultations aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.

This document is written for the following users of the Working Group Consultations application (see the definition of the different roles in § 1.3.4):

- **Voter**
- **Monitor**
- **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
- **[Ballot Owner]** : only concerns the Ballot Owner
- ...

Note :

Within this document, the term “**Ballot**” is used as a generic term : WG Consultations are in fact a special type of Ballot in the more general framework of the Electronic Balloting software (eB3)

1.1 WG Consultations workflow

[All]

The WG Consultation process and its follow up are characterized by the following main stages:

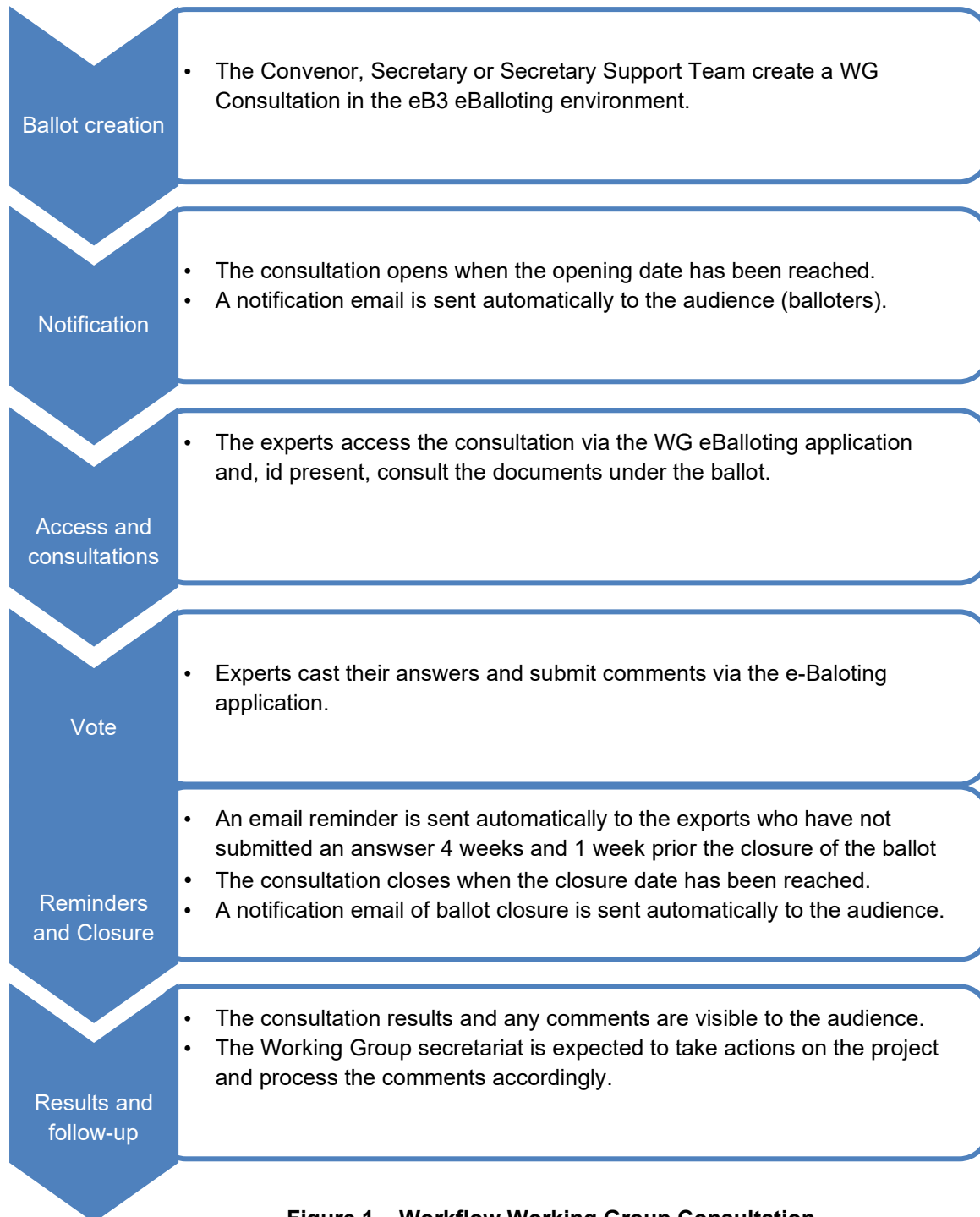


Figure 1 – Workflow Working Group Consultation

1.2 Principles of the Electronic Balloting application

[All]

1.2.1 Permissions to Answer and Comment

- Authorized to **cast Answers** (with associated comments if needed) are the Working Group experts, defined as **WG Committee Members** 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 Working Group Officers and / or Members. Users and their roles are registered and maintained by the user administrators of CEN Member Bodies in the Global Directory and in some cases by CEN User Administrators.

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 balloter, there are other balloting related roles defined in the application which are associated with certain permissions (see details in § 1.2.4).

1.2.3 Centralized and Decentralized balloting roles

- **Centralized roles** : For WG Consultations, there are no Centralized Voting roles. In this type of balloting, only Ballot Owners (= Consultation Owners) may be defined as centralized, and this option is used for CCMC Administrators and IT teams to allow for the Monitoring and control of the Consultation process.
- **Decentralized balloting**: The responsibility to post Answers to the Consultation is decentralized for each Working Group different individuals, who can only answer to the Consultations for Working Groups they are Members of.

The assignment of users to the centralized or decentralized roles is done by the user administrators of each CEN member body and by the CEN user administrators.

1.2.4 WG Consultations 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	Also displayed as ' Consultation Owner '. Responsible to initiate and run the balloting process. This role is assumed by the Working Group Convenor or Secretary and his/her Support Team . Role also accessible to Centralized Administrators defined by CEN	Can create consultations of the respective WG(s), has full access to the WG Consultation balloting environment. A BallotOwner has also the permission to register a vote or comment in the balloting application on behalf of a Voter (if required).
Voter	Expert user authorized to post answers to the Consultation. This role is assumed by Members of the Working Group as defined in the Global Directory.	Can post answers on all consultations inside a particular Working Group.
Commenter	Not used in this type of ballots	
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 consultation is closed , can see all answers cast and final result..
Content Owner	Not used in this type of ballots	

Figure 2 – Consultation internal balloting roles

2 Access to the Application

[All]

2.1 WG Consultations 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 :

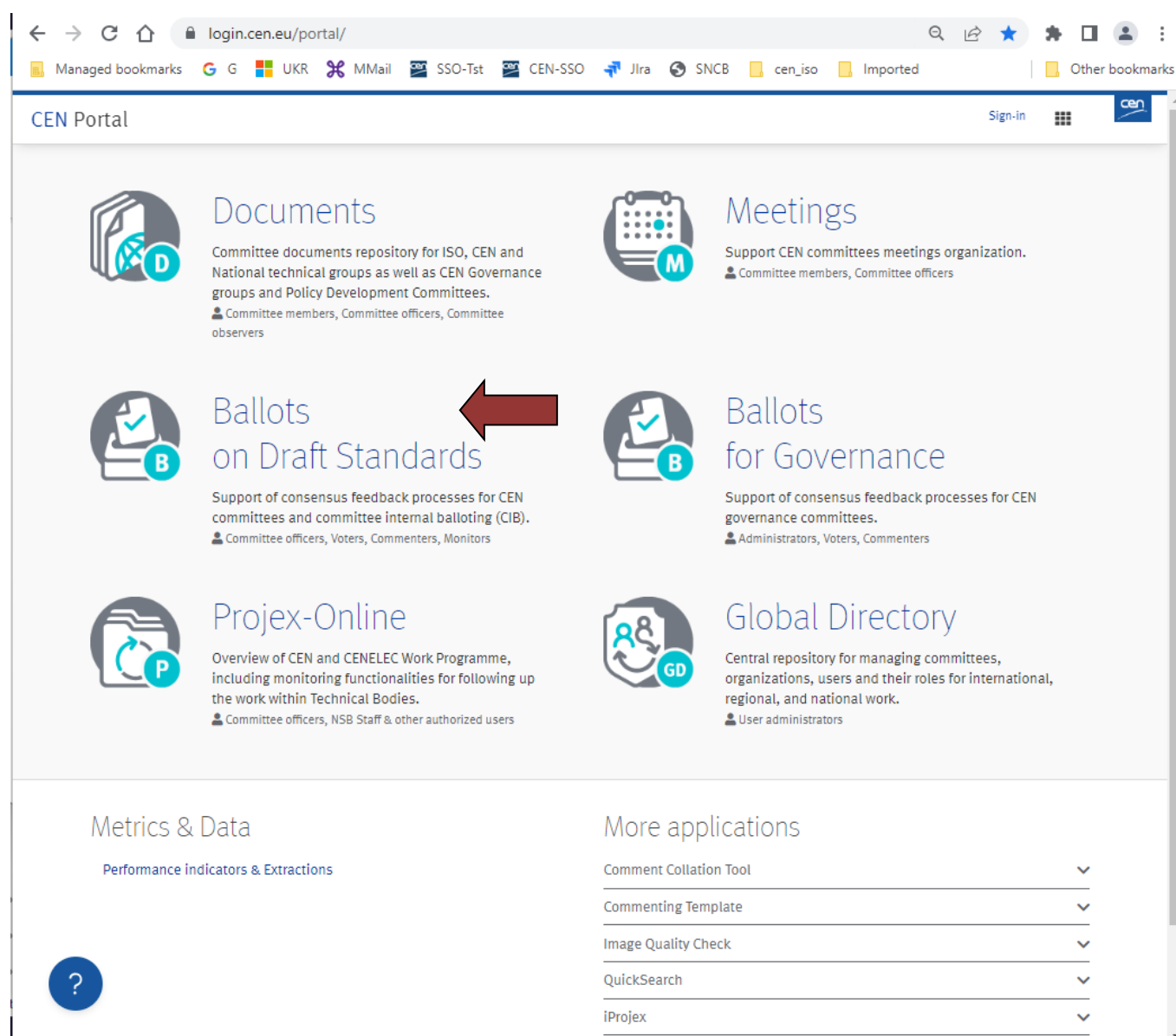







Figure 3 – CEN Applications Portal


Then, in the [**Electronic Balloting and WG Consultations**] Portal, select the last option [**WG Consultations**] :




ELECTRONIC BALLOTING AND WG CONSULTATIONS  [ABOUT](#)

 [ELECTRONIC BALLOTING FOR CEN ENQUIRY](#)
Types: Enquiry


 [GUIDE TO THE APPLICATION](#)
 [CONTACT \(CONTENT ISSUES\)](#)
 [HELPDESK \(TECHNICAL AND FUNCTIONAL ISSUES\)](#)




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Types: FV/UAP


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 [CONTACT \(CONTENT ISSUES\)](#)
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 [COMMITTEE INTERNAL BALLOTING](#)
Types: CIB

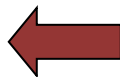
 [GUIDE TO THE APPLICATION](#)
 [CONTACT \(CONTENT ISSUES\)](#)
 [HELPDESK \(TECHNICAL AND FUNCTIONAL ISSUES\)](#)

Click to bookmark

 [WORKING GROUP CONSULTATION](#)
Types: WG

 [GUIDE TO THE APPLICATION](#)
 [CONTACT \(CONTENT ISSUES\)](#)
 [HELPDESK \(TECHNICAL AND FUNCTIONAL ISSUES\)](#)

Click to bookmark



Link to WG Consultations

Figure 4 - Electronic Balloting and WG Consultations Portal

2.1.2 Access directly from WG homepage in CEN Committees

Alternatively, you can also directly access your working group consultations by clicking in the corresponding widget on the homepage of your working group in the CEN Documents environment.

The screenshot shows the CEN/TC 602/WG 01 "First Working Group in Test Committee 602-Upd" homepage. The interface includes a navigation bar with tabs: Administration, General, Meetings, Projects, Member area, and Mail archive. Below the navigation bar, there is a section for "Committee documents" with a table listing documents. The table has columns for "N", "Title", "Modified", and "Expected action". The documents listed include "Énergie éolienne", "Japanese Test document 2 (jp)", "Test document Jade (2)", "Model__Notice_of_meeting_draft_agenda", "Doc-Project-01.pdf", "Doc-Project-01.docx", and "testCarole". A sidebar on the right contains "Pinned content" and a "Ballot documents" section, which is highlighted with a red rounded rectangle. The "Ballot documents" section lists several documents with their respective dates and a "0" icon.

N	Title	Modified	Expected action
20	Énergie éolienne	2022-09-27	
19	Énergie éolienne	2022-03-28	
18	Japanese Test document 2 (jp)	2022-02-25	
17	Test document Jade (2)	2022-01-10	
16	Model__Notice_of_meeting_draft_agenda	2021-10-07	
	Doc-Project-01.pdf Pdf version of document stored in Administrative space	2021-03-18	
	Doc-Project-01.docx Link to project document to test visibility for Committee members	2021-03-18	
	Doc-Project-01.docx Link to project document to test visibility for Committee members	2021-03-18	
15	testCarole lacus vel, placerat mattis libero. Nam placerat lobortis mi, sit amet hendrerit...	2021-09-24	Comment/reply

Ballot documents

MB-Test-Consult-602_WG01-03 WG 2023-07-23	0
MB-Test-Consult-602_WG01-08 WG 2023-08-06	0
MB Demo 602-01 05 Manual WG 2023-09-28	0
Demo Tamara no 1/602_1 WG 2023-06-06	0

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 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.

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

- In the CEN Applications Portal, click on **Sign in**

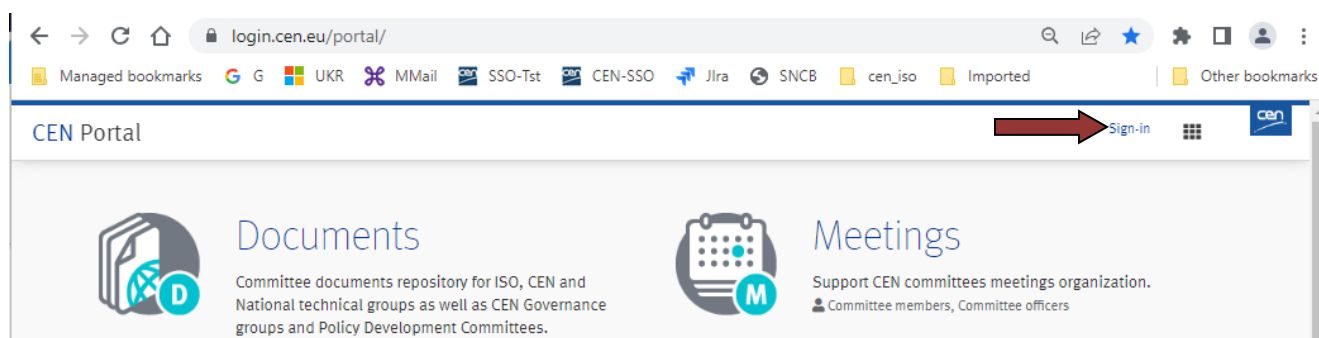


Figure 6 -Sign into applications

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

Acceptance of Terms and Conditions

Please read and accept the below terms and conditions to access the application:

☐ In my activities related to CEN and/or CENELEC, I have read, consent and agree to CEN and/or CENELEC's [Privacy Statement](#) and Data Protection Policy including the processing and disclosing of my personal information, which I voluntarily provide to CEN and/or CENELEC, within the context of European and international standardization.

I have further read and accept the [Declaration](#) related to the permission to access non-public areas on the CEN and/or CENELEC servers, and the [Code of Conduct](#) for delegates, experts and observers participating in the technical work of CEN and/or CENELEC.

I accept the above terms and 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

- Choose **Log-out** on the **Tools** menu.
- Click on **Log-out** on the Log-out screen to leave the CENTC server.
- You will be forwarded to the list of CEN applications.

Committee Internal Balloting
ccolinia@cencenelec.eu
2014-09-29

[All open](#)
[Tools](#)
[Help](#)

All open
[New last 2 weeks](#)
[Closing in 2 weeks](#)
[Closed last 2 weeks](#)
[Search](#)

332 ballots found [\[x\]](#)

« < 1 - 20 > »

Type	Committee	Reference	Vote	Opening date	Closing date
CIB	CEN/TC 89	Registration - National delegation to CEN/TC 89 Plenary 2014	[x] 14 votes	2014-07-09	2014-09-19
CIB	CEN/TC 67	N 561 prEN 12004-1_14.08.22 [x]	11 votes	2014-08-29	2014-09-30

Balloting portal

[Open ballots](#)

[Search](#)

[CENTC Committee Areas](#)

[Manage my roles](#)

[Logout](#)

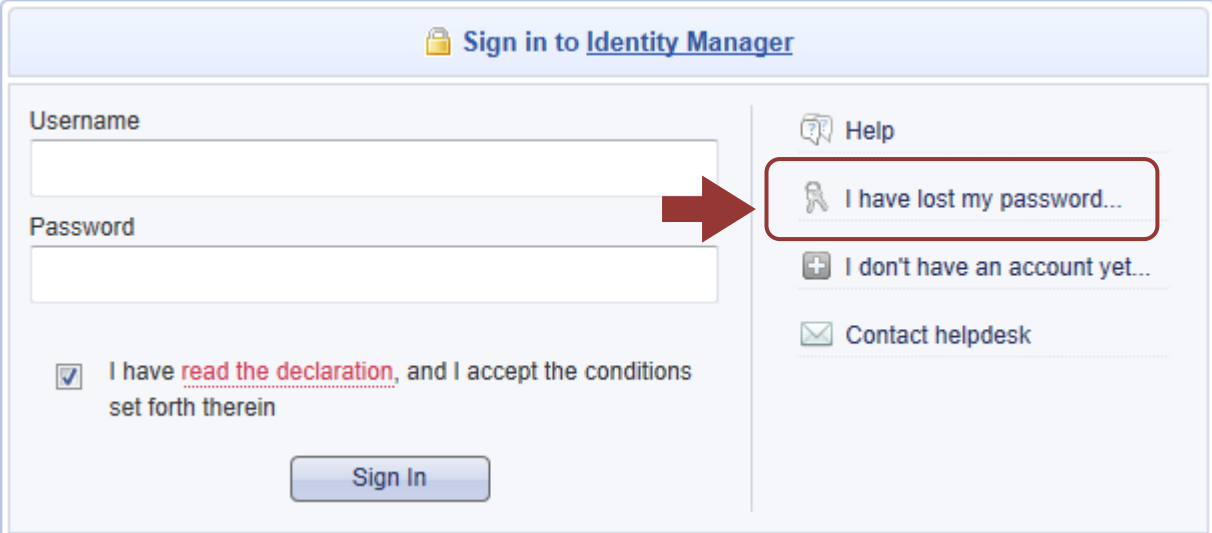
[Ballot owner](#)

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.



The screenshot shows the 'Sign in to Identity Manager' page. On the left, there are input fields for 'Username' and 'Password', a checkbox for 'I have read the declaration, and I accept the conditions set forth therein', and a 'Sign In' button. On the right, under a 'Help' section, there are three links: 'I have lost my password...', 'I don't have an account yet...', and 'Contact helpdesk'. A red arrow points from the 'Password' field to the 'I have lost my password...' link, which is also enclosed in a red rounded rectangle.

Figure 10 – Password forgotten

3 User interface and navigation

[All]

3.1 WG Consultations - Navigation

The **Consultations home page** displays a list of all currently open consultations, 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 in different Working Groups).

Working Group Consultation mbellier@cencenelec.eu
2023-07-03

[All open](#) Tools Help

4 consultations found New Consultation

Type	Working Group	Reference	Consultation	Opening date	Closing date	Role
WG	CEN/TC 602/WG 01	MB-Test-Consult-602_WG01-03			23	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-601_SC01_WG02-04 (Caroline)			25	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG02-04 (Caroline)			25	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG02-07 (Marc)			31	Consultation owner

List of consultations
Click on the consultation reference name to open a specific ballot

Figure 11 – Consultation 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 consultations currently found (the number indicated on top of the consultation list) and not only to the consultations displayed on the current screen. Therefore, a consultation 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):

[All open](#) Tools Help

[All open](#) [New last 2 weeks](#) [Closing in 2 weeks](#) [Closed last 2 weeks](#) [Search](#) Add New Item...

Type	Committee	Reference	Vote	Opening date	Closing date	Role
CIB	CEN/TC 89	Registration - National delegation to CEN/TC 89 Plenary 2014	14 votes	2014-07-09	2014-09-19	Ballot owner

Figure 12 – e-Balloting tabs

Tabs	Description
All open	Displays all the Consultations which are currently open and for which you can give an answer or submit a comment.
New last 2 weeks	Displays all the Consultations which were opened within the last 2 weeks.
Closing in 2 weeks	Displays all the open Consultations which will close during the next 2 weeks.
Closed last 2 weeks	Shows all the Consultations which closed during the last 2 weeks. It allows access to the closed Consultations and the individual answers and comments submitted by the WG experts
Search	Opens the search screen which allows to search with user defined values (e.g. Consultations closed more than 2 weeks ago, search with a particular reference number, etc).

Figure 13 - Consultation tabs functions

3.2 Searching for consultations

The Search screen allows you to enter parameters into the search fields to find the consultations 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**.

Committee Internal Balloting ccolinia@cencenelec.eu
2014-09-29

[Search](#) Tools Help

Type: Reference or Title:
☒ Opening date: from to

Status: Committee:
☐ Closing date: to

Search criteria

Enter your search criteria here and click "Search"

Type	Committee	Reference	Vote	Result	Status	Opening
To start your search, please define one criterion (or several criteria) to search for.						

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	WG (Working Group Consultations) If you selected the generic e-Baloting link in the Portal, and depending on your roles, you might see here other Balloting types (Enquiry , FV , CIB , ...)
Status	Consultation stages
Reference/Title	Consultation reference number or document title element. <u>Notes:</u> <ul style="list-style-type: none">- A search by reference or title is a free text search that matches in any part of the consultation reference number or the title (e.g. searching for "smit" will match "smith").- not case-sensitive.
Committee	Only those WGs 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 consultations

Closed consultations can be accessed in two ways:

- Click on **"Closed last 2 weeks"** from the main screen, which will list all consultations 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 consultation

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

Information **Result** **Participation** **Audience**

CAUTION: This is an informal consultation aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.

Reference: MB-Test-Consult-602_WG01-02

Working Group: CEN/TC 602/WG 01 **Type:** WG (Working Group Consultation)

Status: Closed

Opening date: 2023-02-27 **Closing date:** 2023-05-23

Opened on: 2023-02-27 11:15 **Closed on:** 2023-05-24 00:00

Title: Another Test for Snapshot #2

Reference documents and links

Privacy - CEN-CENELEC

Figure 16 - Consultation Information screen

Tabs	Description
Information	Lists the consultation attributes, the reference documents or hyperlinks, questions and vote values.
Result	Lists the consultation result with the number of answers for each question and the comments received. Includes link to download the results.
Participation	Lists of consultation owners and voters. This tab is only visible to the Convenor, Secretary, and their support team (consultation owner).
Audience	Lists the complete consultation audience. This tab is only visible to the Convenor, Secretary, and their support team (consultation owner).

Figure 17 – Tabs in consultation details screen

3.5 Tools Menu

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

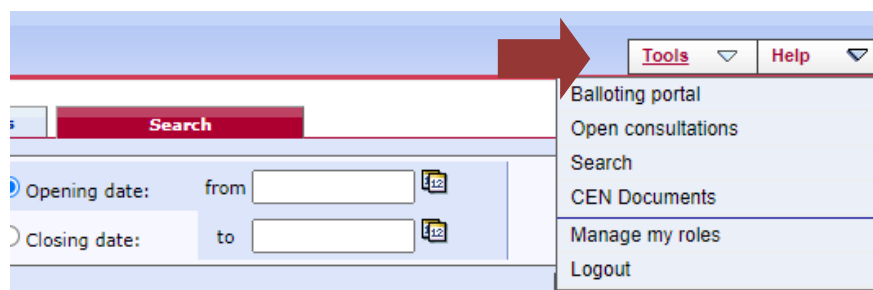


Figure 18 – Tools menu

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

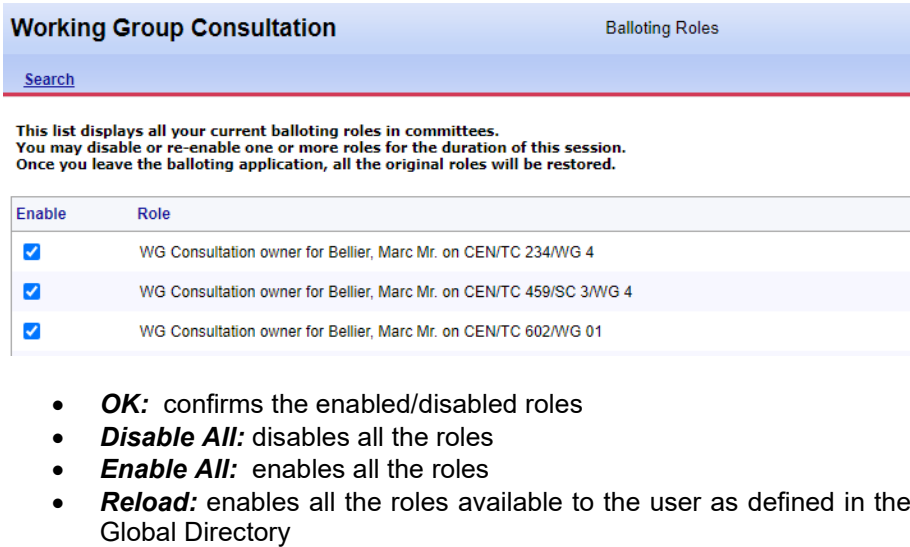
Tools menu	Description
Balloting Portal	Electronic balloting Portal start page.
Open Consultations (same as tab All Open)	This function displays all the open Consultations to which a user is registered.
Search	Direct link to the Search tab.
CEN Documents	Direct link to the WG homepage in CEN Documents .
Manage my roles	<p>This function displays all the roles of a user. It allows the user to disable certain roles temporarily and, thereby, to display only consultations 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.</p>  <ul style="list-style-type: none"> • 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.

Figure 19 - Tools menu options

3.6 Help Menu

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

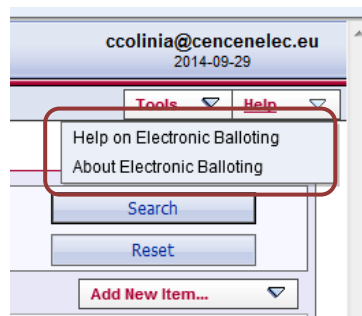


Figure 20 - Help Menu

4 Creating a new consultation

[Ballot / Consultation Owner]

4.1 Create a Consultation

In the drop-down menu "New Consultation" on the right size of the **Working Group consultation**, screen, choose the option "Working Group Consultation"

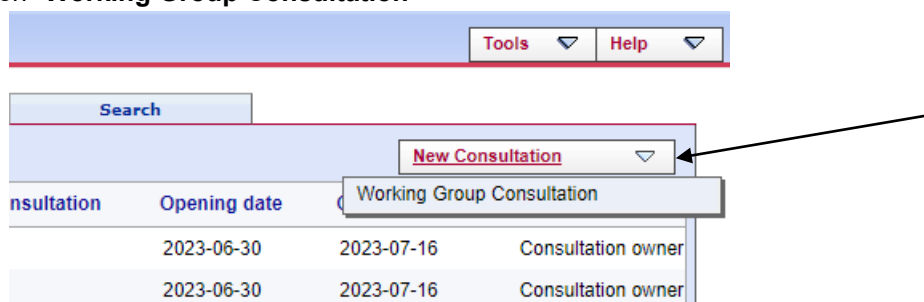


Figure 21 – New Consultation

Note : If you are in the "All ballot instances" view, this menu will read "New Ballot" and will allow to select other ballot types (CIB if you have officer role(s) in some Technical Committee(s)).

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

Step 1 – Working Group selection

This step allows you to select the working group for which you wish to create a consultation. Select the WG from the drop-down list :

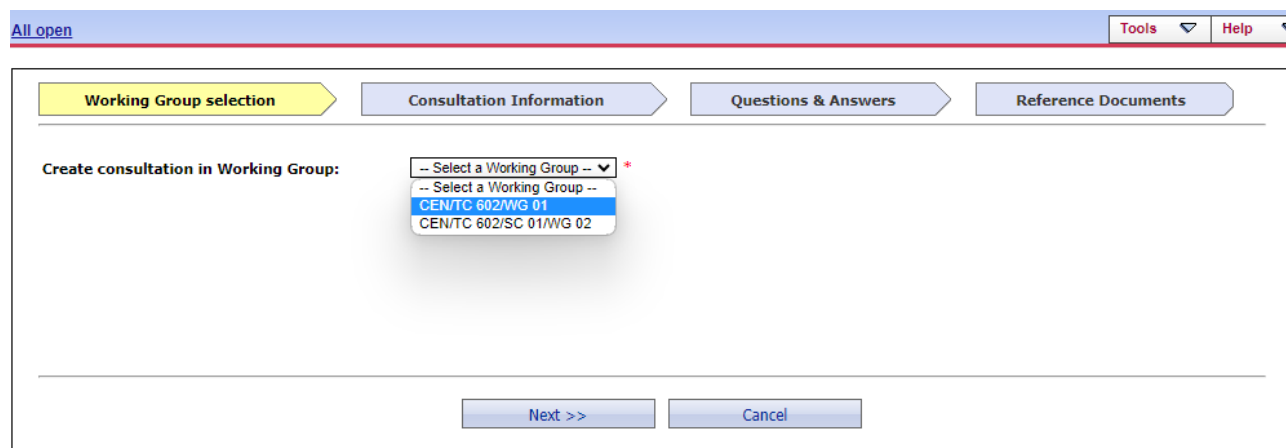


Figure 22 – WG selection



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

Click the **Next** button.

Step 2 – Consultation information

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



The system proposes by default a 12 week duration for the consultation, 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 consultation has been created.

All ballot instances Working Group Consultation caroline.committee@ace.eu 2023-07-05

[All open](#) [Tools](#) [Help](#)

Working Group selection **Consultation Information** Questions & Answers Reference Documents

Reference : *

Title:

Opening date: *
Voting will open at 00:00 Central European Time that day.

Closing date: *
Voting will close at 23:59 Central European Time that day.

Note:

<< Previous Next >> Cancel

Figure 23 - Consultation Metadata

Fields	Description
Reference	Consultation reference or document title.
Title	Title of consultation in English.
Opening date	Consultation opening date (default = tomorrow)
Closing date	Consultation closing date (default = tomorrow + 12 weeks)
Notes	Any notes relevant to the Consultation.

Figure 24 - Consultation metadata fields



The Consultation Reference should be as explicit as possible as it is the reference used to search for your consultation in the electronic balloting platform.

Click the **Next** button.

Step 3 – Questions & Answers

The Consultation process 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 consultation.

❖ Define questions

- Define the question in the textbox.

Define question

Type the text of your question here

Figure 24 - Define question

❖ **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**.

The screenshot displays the 'Questions & Answers' section of the Electronic Balloting Portal. It features a navigation bar with 'Working Group selection', 'Consultation Information', 'Questions & Answers' (highlighted), and 'Reference Documents'. Below the navigation bar, there are two question cards. The first card, 'Question 1', contains the text 'Do you agree with the last document discussed'. To its right, under the 'Answers' heading, there are four input fields: 'YES', 'NO', 'Abstention', and 'No Opinion'. Each field is followed by a dropdown menu for comment options. The options are: 'Comment optional' for YES, 'Comment required (HTML window or CEN Commenting Template)' for NO, 'Comment required (HTML window)' for Abstention, and 'No comment allowed' for No Opinion. An 'Add Answer' button is located below these options. The second card, 'Question 2', is empty. At the bottom of the page, there are three buttons: '<< Previous', 'Create', and 'Cancel'.

Figure 25 - Define answers

Some information about the different types of comment options available:

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

Figure 26 - Comment field options

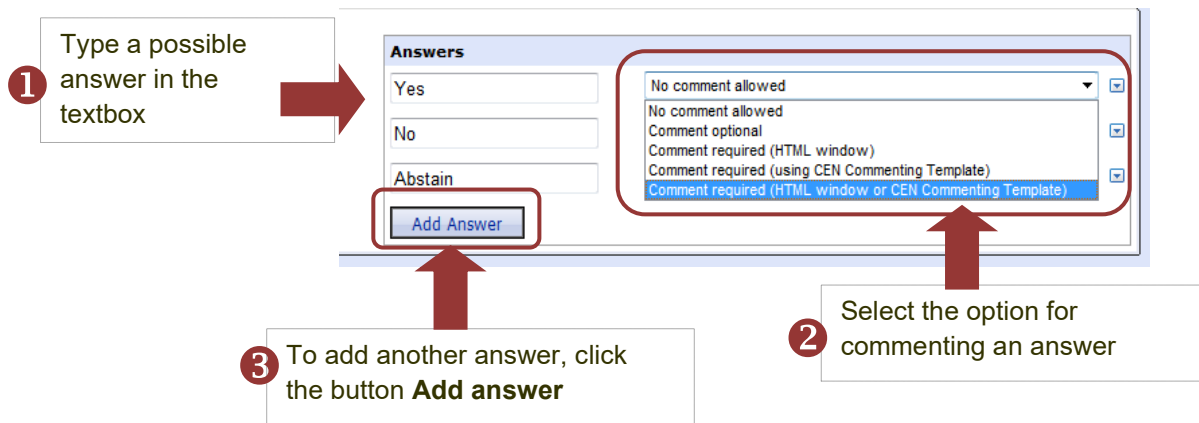


Figure 27 - Define answers

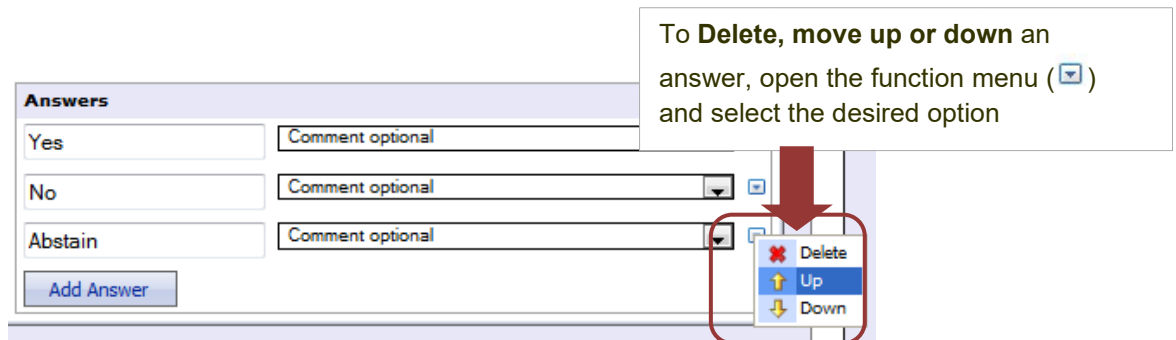


Figure 28 - Change order of answers

❖ 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**.

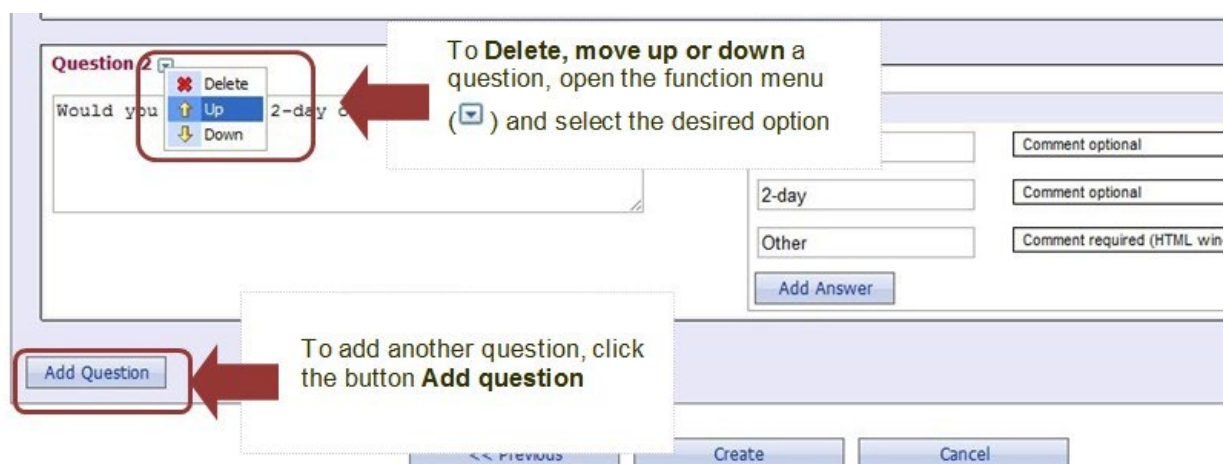



Figure 29 - Add more questions

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

Step 4 – Reference documents

If needed, this step allows you to link to the consultation 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**.

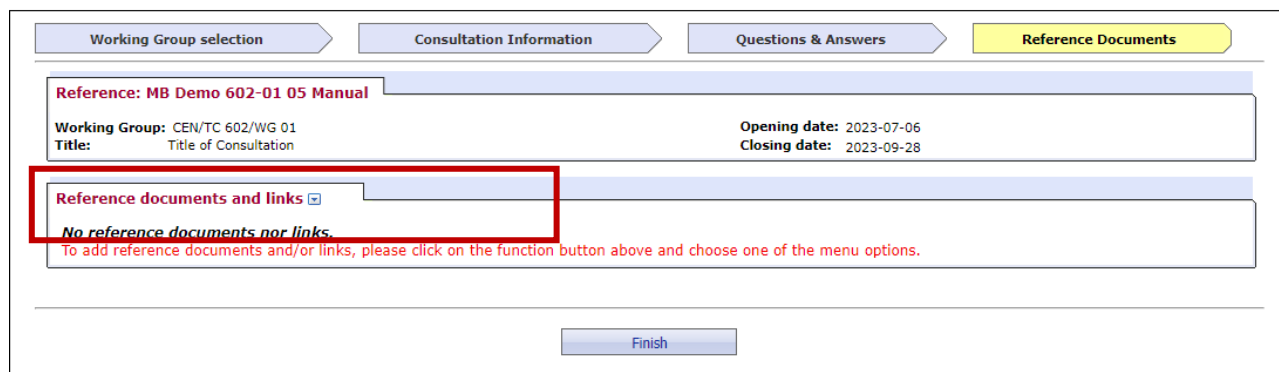


Figure 30 – Add new reference document

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 consultation.

Note :

If there is no Reference Document available, you may finish the Creation process at this step.
If needed it will be possible to add a document at alater stage.

Add New Reference document screen :

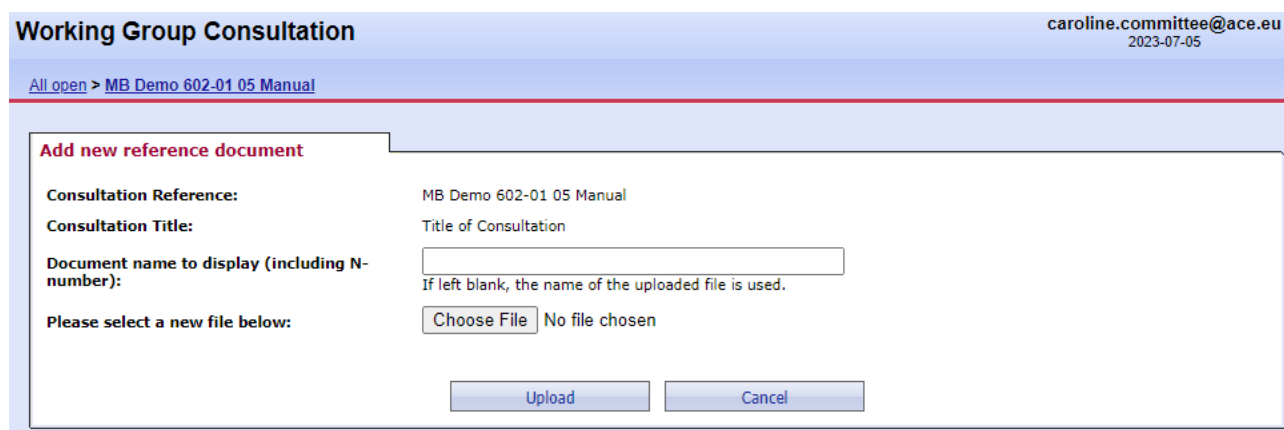


Figure 31 – Add new reference document screen

Add New Link screen:

Working Group Consultation caroline.committee@ace.eu
2023-07-05

[All open](#) > [MB Demo 602-01 05 Manual](#)

Add URL Reference

Consultation Reference: MB Demo 602-01 05 Manual

Consultation Title: Title of Consultation

URL Name:

URL:

Figure 32 – Add new link screen

- ❖ Click on **Submit**.

Click on the **Finish** button to terminate the wizard.

The Consultations has been successfully created, with the reference document and will open automatically on the defined Start date.

4.2 Create a new consultation by cloning an existing one

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





From the list of consultations that are displayed, open the function menu (☰) of the corresponding consultation you wish to clone and select **Clone this consultation (copy questions & answers)**.

Working Group Consultation caroline.committee@ace.eu
2023-07-05

[All open](#)

All open
New last 2 weeks
Closing in 2 weeks
Closed last 2 weeks
Search

5 consultations found

Type	Working Group	Reference	Consultation	Opening date	Closing date	Role
WG	CEN/TC 602/WG 01	MB-Test-Consult-602_WG01-03		2023-07-23	2023-07-23	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-601_SC01_WG01		2023-07-25	2023-07-25	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG01		2023-07-25	2023-07-25	Consultation owner
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG01		2023-07-31	2023-07-31	Consultation owner

Browse

Download consultation content as zip

Delete

Clone this consultation (copy questions & answers)

Figure 33 – Clone a consultation

The following message is displayed :

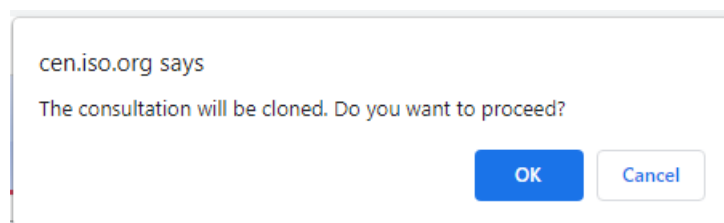


Figure 34 – Message displayed when cloning consultation

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 consultation, reference documents are not copied.

5 Editing existing consultations

[Ballot Owner]

Existing consultations can be modified by the consultation owner at any time as long as the consultation has not closed from the Consultation Information screen.



A voter can edit and/or delete an answer as long as a consultation is open.



No notifications are sent after a change has been made.

5.1 Modify metadata

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

A screenshot of a web application interface for editing consultation metadata. At the top, there are three tabs: "Information" (active), "Participation", and "Audience". Below the tabs, there are two buttons: "Cast vote as" and "Submit Comment as". The main content area shows the "Reference: Test" with a dropdown menu icon and an "Edit" button. Below this, there are two columns of metadata fields. The left column includes: "Committee: CEN/TC 10", "Status: Open", "Opening date: 2014-09-30", "Opened on: 2014-09-30 00:00", "Title: Test", and "Secretariat: France (AFNOR)". The right column includes: "Type: CIB (Committee Internal Ballot)", "Closing date: 2014-12-30", and "Closed on:". The interface has a light blue header and a light blue footer.

Figure 35 - Editing Metadata

Modify any of the metadata as appropriate and click **Submit** to finish editing:

Information

Reference: Test

Committee: CEN/TC 10

Status: Open

Opening date: 2014-09-30
Voting will open at 00:00 Central European Time that day.

Closing date: 2014-12-30
Voting will close at 23:59 Central European Time that day.

Type: CIB (Committee Internal Ballot)

Title:

Activation of WI 00010999

Note:

Submit **Reset** **Cancel**

Figure 36 - Update consultation metadata

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

Ballot Status	Explanation	Visibility of the consultation
Created	The consultation has been created by the Secretary/Support Team (completion of stages 1 to 3 of the consultation creation process)	Secretary/Support Team only
Open	<p>The consultation has opened for voting after reaching the Opening Date. Email notifications regarding the opening of the consultation are sent to the consultation audience.</p> <p>Votes can be cast and comments submitted</p>	<p>Balloter/commenter: Consultation information and consultation document(s); own vote and comments.</p> <p>Secretary/Support Team: the same, plus all votes and comments submitted at a certain point in time</p>

Ballot Status	Explanation	Visibility of the consultation
Closed	<p>The consultation has closed for voting after reaching the closing date. Email notifications regarding the closing of the consultation are sent to the consultation audience.</p> <p>The consultation result is fixed and changes to the consultation are no longer possible</p>	<p>Balloter/Commenter: Ballot information and ballot document(s); Voting results</p> <p>Secretary/Support Team: Same as balloter/commenter</p>

Figure 37 – Consultation Status

5.2 Modify reference files or links

Working Group Consultation mbellier@cencenelec.eu
2023-07-10

[All open](#) > [MB-Test-Consult-602_WG01-08](#) Tools Help

Information | Participation | Audience

CAUTION: This is an informal consultation aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.

[Submit answer as](#)

Reference: MB-Test-Consult-602_WG01-08

Working Group: CEN/TC 602/WG 01 **Type:** WG (Working Group Consultation)

Status: Open

Opening date: 2023-07-04 **Closing date:** 2023-08-06 ⚠

Opened on: 2023-03-14 00:00 **Closed on:** 2023-06-07 00:00

Title: Another test to validate last changes before Pilot deployment for CEN/TC 247

Reference documents and links

CCMC-WG_Consultation_01

Questions and answers

Figure 38 – WG Consultation – Modify Reference Document

To update existing reference documents and links, click on the function menu (☰) next to the current documents or link and select one of two options :

- **Edit** to change the document or link
- **Delete** to remove the document or link

You may also add other Documents or links by clicking on the function menu (☐) next to **Reference documents and links** :

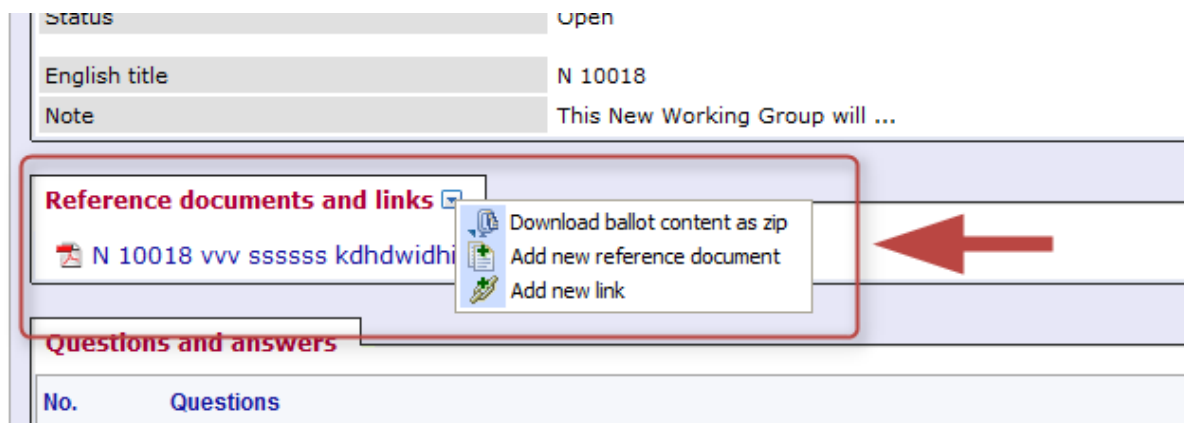


Figure 39 - Update Reference documents and links

You may also add other Documents or links by clicking on the function menu (☐) next to **Reference documents and links**. The process to follow then is identical to the process described above in [4.1 Create a Consultation](#) .

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).

To update the questions/answers of a Consultation, click on the function menu (☐) next to Questions and answers and click on **Edit**.



Figure 40 - Edit Questions and answers

For detailed instructions on how to edit questions and answers, please refer to Step 3 of section [4.1 Create a Consultation](#) above.

6 Submitting answers

[Voters]

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

Working Group Consultation

melanie.committee@afnor.fr

2023-07-05

All open

Tools

Help

All open

New last 2 weeks

Closing in 2 weeks

Closed last 2 weeks

Search

5 consultations found

New Consultation

Type	Working Group	Reference	Consultation	Opening date	Closing date	Role
WG	CEN/TC 602/WG 01	MB-Test-Consult-602_WG01-03		2023-02-28	2023-07-23	Voter
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-601_SC01_WG02-05 (Caroline)		2023-03-01	2023-07-25	Voter
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG02-04 (Caroline)		2023-03-01	2023-07-25	Voter
WG	CEN/TC 602/SC 01/WG 02	MB-Test-Consult-602_SC01_WG02-07 (Marc)		2023-03-08	2023-07-31	Voter
WG	CEN/TC 602/WG 01	MB-Test-Consult-602_WG01-08		2023-07-04	2023-08-06	Voter

Figure 41 – Select consultation

The consultation opens and the following screen with consultation metadata and attached consultation documents (if there are any) is displayed. In order to submit an answer, click on **Submit answer**. To download a file, click on the file name :

Ballot metadata
Ballot document(s)
Ballot question(s) & answers
Answering

Working Group Consultation

[All open](#) > [MB-Test-Consult-602_WG01-03](#)

[Tools](#)
[Help](#)

Information

CAUTION: This is an informal consultation aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.

Reference: MB-Test-Consult-602_WG01-03

Working Group: CEN/TC 602/WG 01
Status: Open
Opening date: 2023-02-28
Opened on: 2023-02-28 00:00

Type: WG (Working Group Consultation)
Closing date: 2023-07-23
Voting closed on: 2023-05-24 00:00

Title: Test Consultation cretaed by WG Convenor Caroline Committee

Reference documents and links

Document on CEN server permissions

Questions and answers

No.	Questions	Possible Answers
1	This is First Question	Yes No * Abstention Don't know

(*) A Comment is required for this answer value.

Submit answer

Back to list of consultations

Figure 42 - Questions & Answers

2023-08-16 17:05

Page | 30

6.1 Submitting an answer

[Voter]

Click on **Submit answer**. The voting screen opens :

Figure 43 – Answer screen

A consultation 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 **Submit answer** 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 come back to the ballot screen without validating the vote.

Type	Participant	Submitted by	Date
	Committee, Mélanie Melle	Committee, Mélanie Melle	2023-07-05 18:42
	This is First Question	Abstention	


Figure 44 – Answer submitted

After having cast an answer, the name of the balloter who cast the vote, is displayed in the list of the *Consultation Information Tab*, together with the date of this action.

6.2 Modifying an answer

[Voter]

A voter can edit an answer as long as the consultation 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"**.

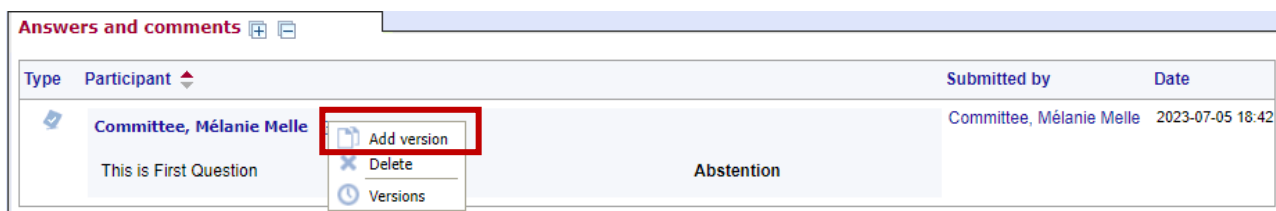


Figure 45 – Add version

This will display the **Answers and Comments** screen again and will allow you to choose another answer, modify your comment and/or modify or delete your comment file.

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 46 – Versions

The screen will show all the successive versions :

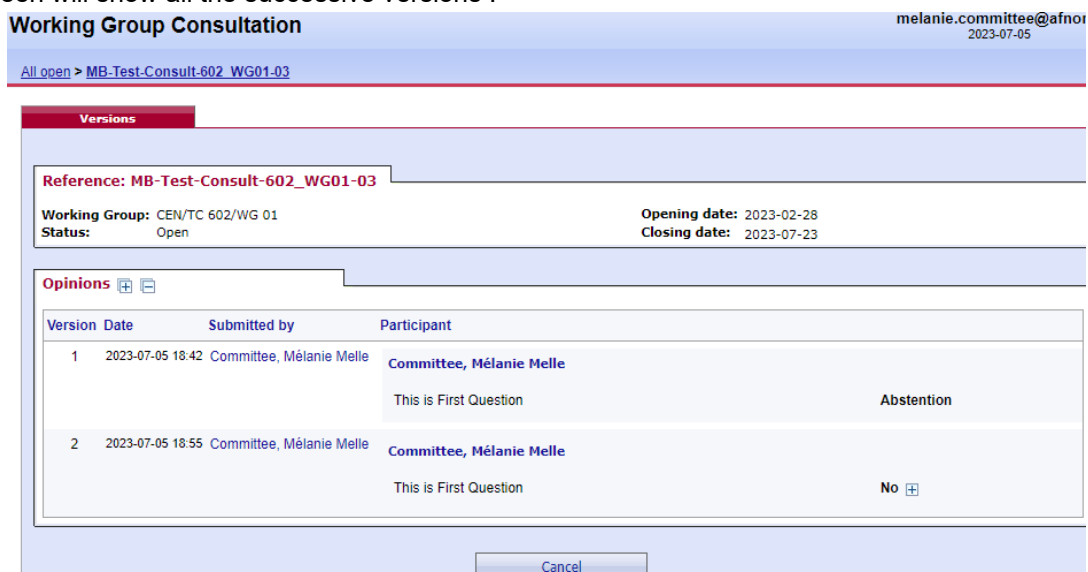



Figure 47 – Answer versions

6.3 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**".

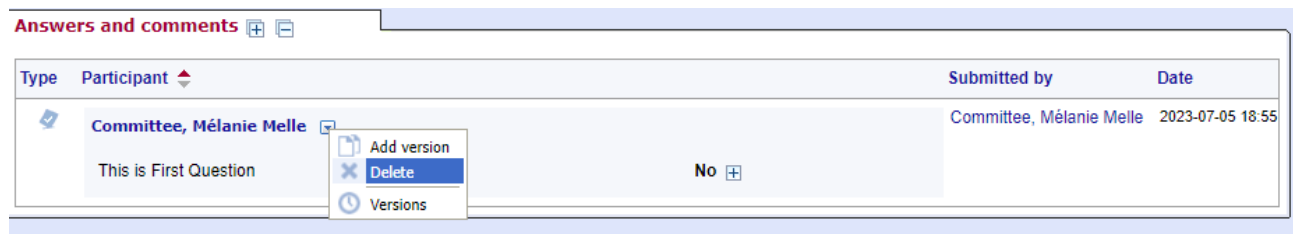


Figure 48 – Delete function

The system will ask you to confirm the deletion.

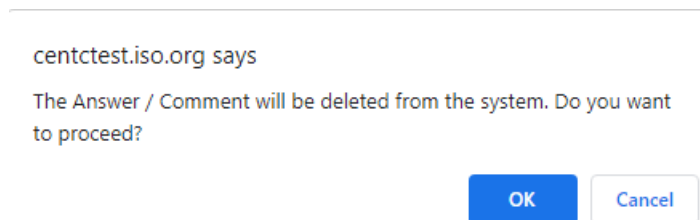


Figure 49 – Deletion confirmation message

Click on *OK*.



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

6.4 View the ballot audience

[Ballot Owner]

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

Working Group Consultation

caroline.committee@ace.eu
2023-07-05

[All open](#) > [MB-Test-Consult-602_WG01-03](#)

Tools ▾ Help ▾

Information

Participation

Audience

CAUTION: This is an informal consultation aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.

Submit answer as

Reference: MB-Test-Consult-602_WG01-03


Working Group: CEN/TC 602/WG 01

Status: Open

Opening date: 2023-02-28


Closing date: 2023-07-23

Note


You can send an email to the complete audience of this ballot by clicking on the envelope here  and follow the instructions. ISOCS staff are not included so remember to add the TPM address.

To send an email to a partial audience, limited to all users registered in one particular balloting role (e.g. only to Obligated voters), locate and click the envelope for that particular role in the left column of the table further down this page.

In order to ensure confidentiality among the recipients to your emails, remember to use the "Bcc:" field of your email application, not the usual "To:" or "Cc:" fields.

Obligated voter 

User	Business role
Committee, Basile Mr	Committee Member of [CEN/TC 602/WG 01]
Committee, Consuelo Mrs	Committee Member of [CEN/TC 602/WG 01]
Committee, Meg Ms	Committee Member of [CEN/TC 602/WG 01]
Committee, Meinhard Dr	Committee Member of [CEN/TC 602/WG 01]
Committee, Melina Mrs	Committee Member of [CEN/TC 602/WG 01]
Committee, Mélanie Melle	Committee Member of [CEN/TC 602/WG 01]
Committee, Serge Mr	Committee Member of [CEN/TC 602/WG 01]
Global, Miguel Mr	Committee Member of [CEN/TC 602/WG 01]
Global, Odile Melle	Committee Member of [CEN/TC 602/WG 01]
Visentini, Carole member Mrs	Committee Member of [CEN/TC 602/WG 01]


Ballot owner 

User	Business role
Amrani, Hayat Ms	CIB Ballot Owner representing CEN
Apel, Holger Mr.	CIB Ballot Owner representing CEN
Bellier, Marc Mr.	CIB Ballot Owner representing CEN
Beltrao, Alexandre Mr.	CIB Ballot Owner representing CEN

Figure 50 - 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.

6.5 Cast an answer on behalf of someone else

[Ballot Owner]

A ballot owner has the possibility to submit an answer on behalf of any participant.

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

The screenshot shows the 'Working Group Consultation' interface. At the top right, the user 'mbellier@cencenelec.eu' is logged in on '2023-07-05'. The breadcrumb trail is 'All open > MB-Test-Consult-602_WG01-03'. There are 'Tools' and 'Help' links. Below the header, there are tabs for 'Information', 'Participation', and 'Audience'. A yellow caution box states: 'CAUTION: This is an informal consultation aiming to collect written advice and contributions. WGs do not vote and do not take decisions but may provide recommendations to the parent committee.' Below this, a red arrow points to a button labeled 'Submit answer as'. The main content area shows details for 'Reference: MB-Test-Consult-602_WG01-03', including Working Group (CEN/TC 602/WG 01), Status (Open), Opening date (2023-02-28), Closing date (2023-07-23), and Title (Test Consultation created by WG Convenor Caroline Committee). There is also a section for 'Reference documents and links' with a link to 'Document on CEN server permissions'. At the bottom, there is a table for 'Answers and comments' with columns for Type, Participant, Submitted by, and Date.

Figure 51 – Submit an answer as

The next screen will allow you to :

- select the Participant on behalf of which you will submit the answer,
- and then the answer to each of the questions in the ballot.
- Click on the **Submit answer** button to save the answer.

The screenshot shows the 'Working Group Consultation' interface with a 'Consultation' tab selected. It displays the same reference information as Figure 51. A red arrow points to a dropdown menu labeled 'Consultation: -- select a participant --'. A text box above it says 'Select the Participant from the drop down list'. Another red arrow points to a dropdown menu labeled '-- select an answer --'. A text box next to it says 'Select the answer to each question'. At the bottom, there are buttons for 'Submit answer', 'Reset', and 'Cancel'. The user 'by: Bellier, Marc Mr.' is visible on the right.

Figure 52 - Enter answer on behalf of a participant

6.6 Add an answer after the consultation has been closed

[Ballot Owner]

As the Secretary or Convenor of a working group, or a member of the support team, you can re-open a ballot that has closed in order to cast a last minute answer on behalf of a 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)

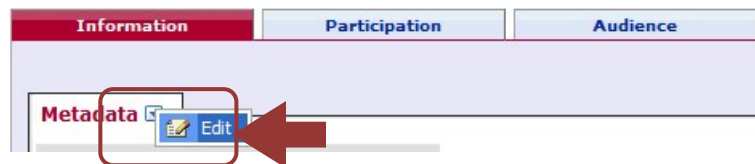


Figure 53 - Edit Ballot Metadata

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

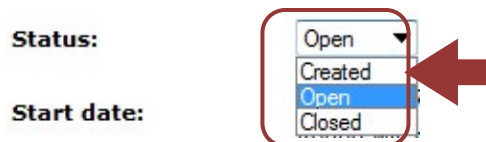


Figure 54 - Edit Consultation Status

You will be taken back to the consultation.

Step 2: Submit the answer

Click on the **[Submit answer as]** button on the top right of the screen, and enter the answer as explained above in section [6.5 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 ).

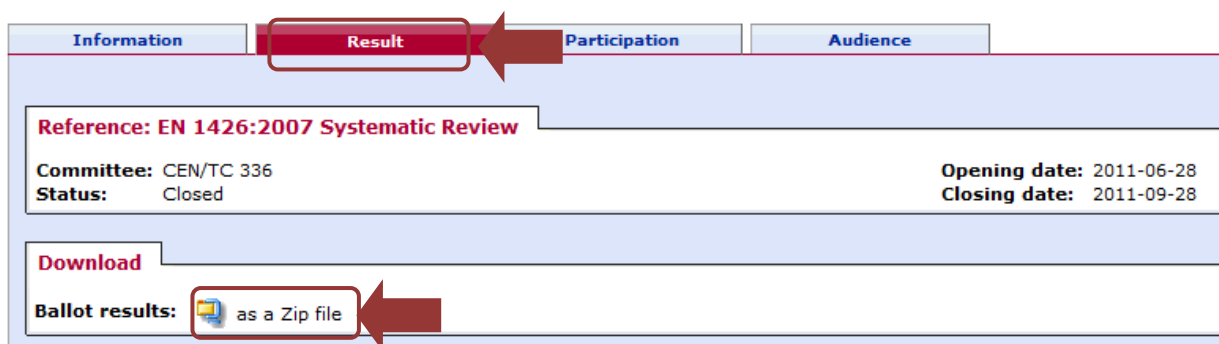


Figure 55 - Download ballot results/comments

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




Name	Date modified	Type	Size
 CommentFiles	2011-09-28 15:08	File folder	
 index.pdf	2011-09-28 15:08	Adobe Acrobat D...	7 KB
 index.rtf	2011-09-28 15:08	Rich Text Format	48 KB

Figure 56 -Extracted folder

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

In your internet browser, go to <https://experts.cen.eu/> , under User Guides and templates, go to <https://experts.cen.eu/trainings-materials/user-guides-templates/#cen-iso-commenting-template-and-comment-collation-tool> .

Here you find the user guides to the **CEN-ISO Commenting Template and Comment Collation Tool** and the links to download the tool :

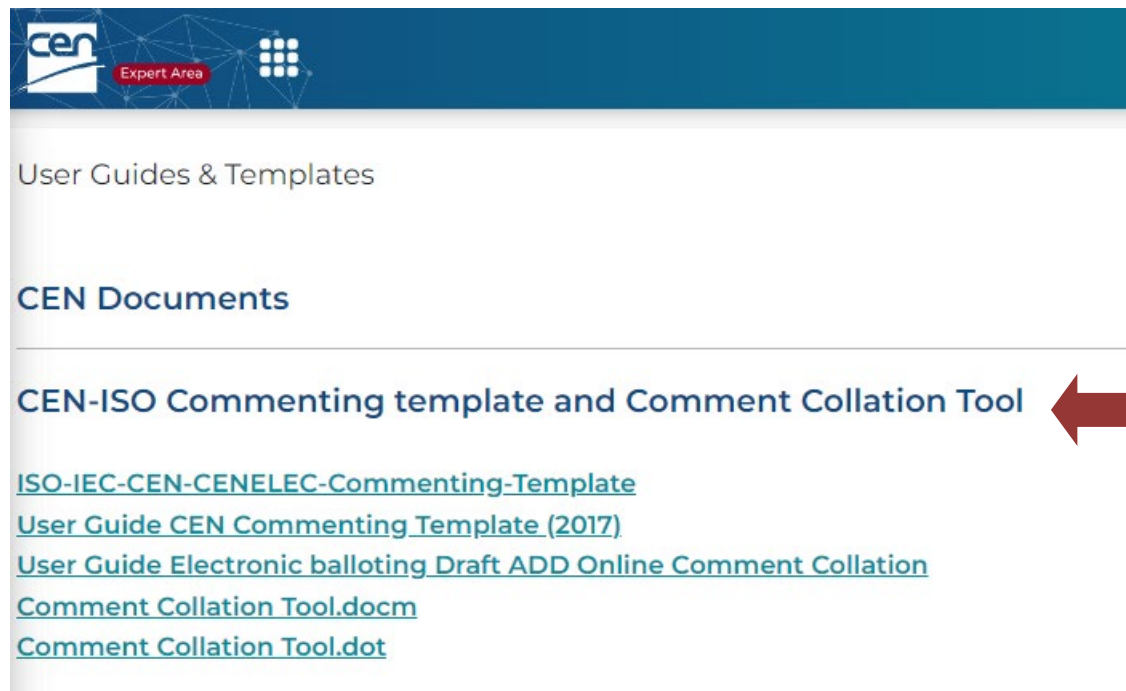


Figure 57 - Comment Collation Tool



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**.



Figure 58 – Help menu