Administering Decidim
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1. INTRODUCTION

1.1 Citizen participation in the Network Society

Becoming a network(ed) society. Information and communication technologies (henceforth, ICTs) and their associated practices are bringing about irreversible changes to the social and political landscape. From the smallest residents' association to the most intensive electoral campaign, from a neighbourhood organisation or social movement to the European Union, political relations are being increasingly determined by the use of digital devices and technologies. It seems that the future of democratic participation and collective action will be through the development of digital platforms and hybrid processes, which renovate traditional practices and combine them with digital ones (Fuchs, 2007).

This transition coincides with the decline of representative systems over the last few decades (Norris, 1999; Pharr & Putnam, 2000; Tormey, 2015), which has contributed to the questioning of the legitimacy and sense of democracy itself, reduced and often identified with this system (Crouch, 2004; Keane, 2009; Streeck, 2016). Several authors have used the terms "post-representation" to refer to the emptying of power and meaning of the representative institutions that go from globalisation to disaffection and divestment of citizens (Brito Vieira and Runciman, 2008; Keane, 2009; Rosanvallon , 2011; Tormey, 2015). The various attempts to boost participation have proved unequal to the task of reversing these trends (Keane, 2011; Tormey, 2015).

This long-running political crisis comes on the back of the financial and economic crisis of 2008, and is directly linked to this earlier crisis. Even so, millions of people mobilised in the face of the crisis, intent not only on demanding but also on experimenting and building a real democracy. The key development here was the 15M network-movement. It is in the context of technological hypermediation that information and communication technologies, used in the 1980s and 1990s to accelerate financial flows and globalisation (Castells, 1996), became crucial spaces and devices for a multitudinous re-appropriation of policy, as well as democratic experimentation (Martinet Ros et al., 2015).

After four years of numerous successes and failures, new political citizen initiatives in May 2015 managed to take power in Spain's main cities, including Barcelona. In this respect they were riding on the tide of countries such as Iceland, where the economic crisis had led to a period of citizen re-appropriation of the institutions and fertile democratic innovation, based on an intense and creative use of ICTs.

Since 15M, most of the experiments aimed at introducing new forms of participatory and deliberative democracy (Barber, 1984; Habermas, 1994, 1996; Della Porta 2013) have been technologically mediated. As can be seen from the case of Iceland (as well as others, such as Finland), the democratising processes of citizen mobilisation and empowerment require technopolitical coordination (Rodotà 1997; Martinet Ros et al., 2015) to achieve their maximum richness and capacity. Technopolitics stems from the politicisation of technologies and technological re-assemblage of politics as well as the co-development and co-production of politics and technologies. As for forms of technopolitical participation and deliberation, digital and face-to-face practices, spaces and processes connect to and feed back from one another, acquiring a multi-layered dimension. These participatory devices are geared towards increasing the number, variety and parity of players that "take part" in the city's common government, expanding and enriching the areas, forms and periods in which it takes place and helping to boost a collective intelligence (Levy, 1997) capable of taking on the complexity of contemporary urban life. Technopolitics needs to tackle the numerous limits of what has been called "digital democracy" (Hindman, 2008) starting by freeing itself from the technocentric and technooptimistic narratives around digitally mediated participation.

New participatory processes are being built within a context full of opportunities and fraught with risks. The 2015 government programme and Municipal Action Programme (PAM) for 2016-2019 drawn up for the city of Barcelona gives centre stage to participation and, more specifically, innovation and the development of new democratic participatory models. PAM, the development of which involved thousands of people, meets a clear social demand that calls for a thorough redesign of the democratic system and its participatory mechanisms. This, however, is occurring in a context defined by: a) large politically, economically and socially excluded population sectors; b) increasing difficulty accessing participation as a result of the economic-crisis situation; c) a crisis over the legitimacy and operability of the representative democratic system and public authorities; d) an enormous technological dependency on private corporate infrastructures and services; e) a legal and political context adverse to direct democracy, social independence and territorial sovereignty; f) an abysmal institutional disadvantage in understanding social complexities through techniques analysing social-behaviour data and models that big technological companies and digitally coordinated services possess.

1.2 Data Control and digital infrastructures for democracy

In the context of new configurations of informational capitalism (Castells, 1996), so-called "data capitalism" (Lohr, 2015; Morozov, 2015) or "surveillance capitalism" (Zuboff, 2015), the new digital infrastructures of democracy run the risk of

contributing to dynamics contrary to such principles as privacy and technological sovereignty. Exclusive, closed and opaque platforms geared towards exploiting social activities for corporate profit are operating as non-democratic spaces occupying more and more areas of social life. This model is particularly dangerous in relation to the new infrastructures and processes of democracy that we are talking about.

Compared to the exclusive and corporate infrastructural model, the public commons model, which we believe decidim.barcelona's development needs to be inspired by, is geared towards developing platforms where design, ownership and management are free, open and participatory, shared between public workers and citizens (organised or not). Under this model, not only the platform's code but also the data that are generated in it are processed and appropriated according to the logic of public and common management. The opening-up of everything and anything to participation, the hallmark of the commons as a political principle (as opposed to the private and even state-public sphere --- Laval & Dardot, 2015), seems to be a basic condition for participatory infrastructures to be fully functional. Participation has to be recursive here: it needs to help to define and establish the infrastructural conditions of its own existence and to affect the design, development and management of digital participatory platforms as well as the processes and results (e.g. data) that are generated in them.

Put in the hands of large digital-service corporations, the algorithmic organisation of social life and the area we are concerned with, political participation, poses a risk to democracy and technological sovereignty that only a public commons effort in digital infrastructures can reverse. Only platforms based on free, open, transparent, secure and public-commons management software offer guarantees when it comes to building democracies of greater quality. The democracy of the future has to be built, then, on democratic infrastructures.

2. WHAT IS DECIDIM?

Decidim is a technopolitical project. A digital citizen-participation platform for a democratic city, made openly and collaboratively using free software.. It is a public commons infrastructure. Public because it enjoys a clear institutional impetus and commons because the code is open and free, in other words, anyone can see it, use it, copy it or amend it. It is a platform designed for coordinating citizen-participation processes and spaces, aimed at extending and facilitating access to citizen participation, opening new spaces for deliberation and collaboration in co-designing and co-producing public policies and new spaces for direct participation and democracy, thereby enabling disintermediation and cooperation between citizens, institutions and organisations of civil society.

Figure 1 - decidim.barcelona

2.1   Principles

The Decidim platform has been designed and developed on the basis of a series of principles that promote further exploration and democratic innovation in the digital era as well as possibilities for improving, opening and developing citizen-participation policies and democratic forms of government at various levels, with special emphasis on the municipal scale. These principles are listed below:

Technopolitical hybridisation

This is key to preventing what we could define as "digital reductionism" (Calleja-López, 2017), a variant of technocentrism that puts the emphasis mainly or exclusively on the new participatory forms' digital aspects and infrastructures, without dealing with the necessary powerful innovations in participatory practices, processes and culture that result from the hybridisation of face-to-face and digital participation. The hybrid approach attempts to connect spaces and activities taking place in decidim.barcelona with face-to-face spaces and activities and to consider the multiple variants that may arise for the purposes of boosting new forms of collective action.

Enhanced and multi-modal participation

The result of digital reductionism is to foster "click-participation" (Calleja-López, 2017), where participation becomes a definite phenomenon, first and foremost for its digital aspect, and, more specifically, for its convenience, speed and non-interference with other players and ideas. There is therefore a need to boost enriched forms of interaction between people in decidim.barcelona, and between them, the platform's contents and the hybrid participatory processes in a broader sense. This implies, on the one hand, enriching participatory processes with functions that go beyond voting (information and data displaying, deliberation etc.,) and, on the other, designing hybrid processes (e.g. Face-to-face meetings connected to the platform), which turn participation into an enhanced, comprehensive and multimodal participation, rather than reduced and "clicked".

Transparency and traceability

With the exception of data that can affect user privacy, details of activities in participatory processes in digital media need to be absolutely traceable and public, if a new level of transparency in participation is to be fostered. Transparent participation and traceability are necessary conditions for confidence in these new processes.

Opening/ releasing

The principles of releasing and opening refer firstly to the platform's code and functions, secondly to the processes' data and contents and thirdly and more generically, to the processes themselves. This implies, in the first two cases, using the most exacting share-alike licenses and standards (e.g. Affero GPLv3 for code, CreativeCommons for content, Open Access Database Licences for data). Decidim needs to be a free-software platform that allows anyone to see, amend and reuse

the code it is based on. In the case of processes, these principles connect to several others that we mention in this list, such as transparency and accessibility, and aim to make these processes as participatory and reappropriable as possible on multiple levels.

Cross-cutting participation

Dealing with many of the keys of success for recent initiatives such as 15M, decidim.barcelona's deployment and communication strategies and media processes need to be geared towards achieving legitimacy first and then participation, within reach of as many social and political groups as possible.

Knowledge, technoscience and collective intelligence

The new forms of participation should benefit from the possibilities that are offered by both popular and expert knowledge from citizens and data science (data occasionally from the participatory processes themselves) to improve decision-taking and participation. An informed and expert participation, capable of catalysing social knowledge.

Collective and networked participation

One of the central challenges to achieiving an "enhanced", digitally mediated, participation, is boosting its collective dimension in the face of atomising tendencies, often resulting from remote-participation conditions. This implies using functions that boost interactions between users in collective processes, whether on a platform or face to face. Digital or face-to-face discussion and deliberation spaces are necessary for coordinating better participation.

Public-commons orientation, reappropriation and recursive participation

Democracy's new digital infrastructures have to be a space belonging to, by and for the commons. If democracy is to be promoted, infrastructures themselves have to be radically democratic. This implies consideration of an innovative and alternative model to the one for privatising the public sphere. To this end, Decidim needs to be a digital infrastructure of public-commons construction, ownership and use. In other words, what we define as "technopolitical commons", technology open to participation from everyone and anyone in its design and management, governed through distribution and with collective-production and share-alike models. Compared to the closed and exclusive platforms controlled by big corporations, Decidim is a democratic infrastructure for democracy.

Technopolitical accessibility and training

It also needs to be a public service, which is why it is essential to ensure citizens have access and training for taking part and exploiting all its potential. Promoting its grassroots-empowered use and use by excluded social groups is a key challenge. Both decidim.barcelona and digital participatory processes have to be governed by more demanding accessibility standards (e.g. Those of the Web Accessibility Initiative, WAI).

Independence, empowerment and affiliation

If social movements have demonstrated something over the last few years it is the central role played by self-organised collective action in kick-starting and guiding processes of change. In this regard decidim.barcelona and the processes using the platform need to boost social independence and self-organisation. In addition, political affiliation has to be a requisite feature in many of the platform's processes, given that it is a key element of the platform's medium- and long-term public and operative legitimacy. In other words, both independent social processes and bottom-up processes that are affiliated to public institutions.

2.2   Brief history

During its public presentation in September 2015, Decide Madrid, a digital participatory platform launched by Madrid City Council and based on Consul software, began to experiment with various participatory processes, such as public debates and citizen proposals. Launched by Barcelona City Council, the Decidim Barcelona project, which was also based on Consul but with major changes and adapted to new needs, was presented in February 2016. Its original goal was to coordinate the participatory process for drafting the Municipal Action Plan (PAM) as well as other participatory processes in the city in the future. Some 25,000 people signed up to it in under two months, 10,860 proposals were submitted, 410 meetings held and over 160,000 votes in favour collected. In this way a collaboration and deliberation space opened up between citizens, social organisations and Barcelona City Council.

A great deal of interest was expressed in many municipalities in going ahead with similar processes, taking advantage of the technology used, given its success and the fact it was free and reusable. To be more specific: Coruña City Council, through its A Porta Aberta platform for Participatory Budget processes; Oviedo City Council, through its Consulta Oviedo, with a space for citizen proposals, and Valencia City Council, through decidimVLC, for preparing participatory budgets. There were also numerous cases of local authorities and other institutions showing

great interest in the decidim.barcelona project and its implementation, such as the city councils of Hospitalet, Badalona, Terrassa and Gavà, as well as Barcelona Provincial Council and the Localret Consortium.

This series of changes and adaptations led in turn to a new technological need involving the adaptation of technology dealing with local-authority diversity, independence and the medium-term sustainability of the platform. Hence the establishment of a scalable and decentralised (or modular) development strategy enabling the entire project to be flexible and grow over time as well as generate a development, functional design and support community, which is sustained at both municipal and (more importantly) inter-municipal levels.

This led Barcelona City Council to thoroughly reconsider the platform's architecture and carry out a complete rewrite of the software based on the above-mentioned principles and needs. This rewrite gave rise to the Decidim project, a generic,participatory democratic framework based on Ruby on Rails, whereby any group, organisation or institution that wanted to use it could do so with minimum technical requirements.

2.3   Open development and free software

The Decidim platform project has been developed with free software (both at its initial stage, based on Consul, and after the code's complete rewrite) and all its development has been open, enabling its entire development to be traceable and followed right from the very beginning.

Its creation from free software refers to the fact that the platform's source code has a AGPL v3 Licence or GNU Affero General Public Licence[3], which means the code has to allow for the possibility of its being consulted, copied, amended and reused, so long as the same licence is kept in any work or product derived from it. This is one of the licences that provides most freedom and is copyleft[4]. In this regard, it makes sense for public authorities to make a clear commitment to this type of software, given that it is through such licences that we can receive social return on our public investments.

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[3]

https://github.com/AjuntamentdeBarcelona/decidim/blob/master/LICENSE-AGPLv3.txt

[4]   Copyleft stands for a whole range of licences that can be applied to IT, artistic and other creations. Copyleft's supporters see copyright as a way of restricting people's right to make and redistribute copies of a work.[2] A copyleft licence, in fact, uses actual copyright legislation to ensure that everyone who receives a copy or derived work can use, amend and even distribute both the work and any derivative versions. In a strictly non-legal sense, then, copyleft is the opposite of copyright. (Wikipedia, 2017).

The fact that the software has been openly developed means that the entire development process is transparent and accessible, in other words, that anyone can see, right from the start of the software's development, every change, contribution, community of developers involved etc. By the same token, transparency is becoming a fundamental principle not just in citizen participation but in software development too.

All this has been done on a platform designed for open collaboration in software development known as GitHub[5]. This platform enables access to codes and monitoring of the software's development. GitHub is designed to host Git repositories, though there are other alternatives to GitHub such as GitLab.

2.4   Decidim Barcelona

Decidim Barcelona is the first instance of Decidim and the origin of the project. Decidim Barcelona came about from Barcelona City Council's need to open up a technologically mediated citizen-participation process around the Municipal Action Plan (PAM), with three major goals: making a process that is transparent and traceable, expanding participation through the digital platform and integrating face-to-face and digital participation.

This process received over 10,000 proposals and more than 160,000 votes in favour, with a final balance of 71% of citizen proposals accepted and included in PAM through over 1,600 initiatives. Decidim was originally designed exclusively for hosting this process though the need for extending it to other participation processes was quickly spotted.

It was here that the idea for today's Decidim came about. A participatory platform that enables as many processes as people want, divided up into stages and with the possibility of setting several functions at each stage. The possibility was accordingly left open for designing new functions that could be integrated into the processes (surveys, collaborative-text drafting, result monitoring and so on), as well as the integration of new participatory spaces such as citizen initiatives and participation councils.

Decidim Barcelona is currently (July 2017) hosting 12 participatory processes and already has some 26,600 participants, almost 12,000 collected proposals, 1,700 results, 670 face-to-face meetings and 185,000 votes in favour collected. The platform's good results in Barcelona led to its extension to other municipalities, including Hospitalet de Llobregat, Sabadell, Badalona, Terrassa, Gavà, Sant Cugat, Mataró and Vilanova i la Geltrú.

2.5   Decidim Municipis

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[5]   https://github.com/

Decidim is a multitenant platform, that is, a platform where as many instances can be used as needed, with a single installation. There are numerous successful examples of multitenant architectures in the world of software, such as the Wordpress free software for blogs project. It is especially useful for institutions that wish to provide Decidim as a third-party service. The Provincial Council's case is especially important as it can be used with a single installation - maintained, updated and sustained by a single entity - for as many local authorities as desired, thereby reducing installation and maintenance costs and providing technological solutions for improving citizen participation in medium-sized and small local authorities that would otherwise have much less access to such resources.

3. ADMINISTERING DECIDIM

Deploying Decidim means taking account of all the activities that play a part in the configuration of the platform and the deployment of the participatory processes. Acquiring knowledge in administering Decidim enables control over fundamental matters such as configuring a participatory process, activating a voting stage and receiving votes, moderating the platform, managing associated legal texts, managing authorisation from the administrators and monitoring and verifying organisations. None of these aspects are strictly technical but they do involve a series of political decisions over how we want Decidim to be, what messages and contents it has to contain, what the moderation policy for comments and debates has to be and, above all, how a specific participatory process has to be, and what functions it has to have active. This is why it is essential to understand the socio-technical implications of the Decidim platform's administration and management when it comes to deploying the platform.

To understand how Decidim works, we need to distinguish between participatory spaces and components and features. The participatory spaces are the channels that citizens can participate through when public decisions are being taken, such as participatory processes, citizen initiatives, public consultations and assemblies and Councils. Whereas participatory components and features are mechanisms that enable interaction between users of the platform and the various participatory spaces. Participatory components include proposals, surveys, voting, results, pages, meetings, etc.

Therefore, a participatory space as a participatory process, in the various stages, can incorporate several components such as face-to-face meetings, proposals, surveys and results and the monitoring of these.

So, participatory spaces are configured by defining (and configuring) the components they are going to have. It is important to bear in mind that these participatory components and the various functions are repeated in the various spaces, offering many opportunities when it comes to configuring the various spaces. This simplifies learning as once a space has been configured, it is then easier to configure another.

This chapter provides a full description of how to configure the Decidim platform for a local authority (or instance) and how to configure, manage and administer the various participatory processes. A description has been given in tutorial format, to help with understanding administration tasks, following Decidim's literal fields and

enclosing screenshots to facilitate their interpretation. This tutorial is subject to the Decidim v09del version and may be amended as it is updated to new versions, especially when it comes to incorporating new components and participatory spaces and modules.

Managing (administering) the Decidim platform is relatively simple and intuitive and no specific IT knowledge is required.

The administrators of a local authority's Decidim platform, in other words, those with the necessary authorisation for managing the platform, can configure the platform in a general way (images, information etc.,) and manage the various participatory processes (configuring, editing, analysing and concluding).

What is more, they can authorise several individuals to configure certain participatory processes ("process administrators") or monitor the processes ("collaborators"). Collaborators, can see what is on the process administrator menu though they cannot edit.

Below there is a description of the main steps for configuring a local authority's Decidim and its participatory processes and for monitoring them.

3.1   How to access the administrator menu

First you need to start the session. Go to the top right part of Decidim webpage (Figure 2) and click on **Sign In**. Only those whose administrator authorisation has been configured can access the Dashboard.
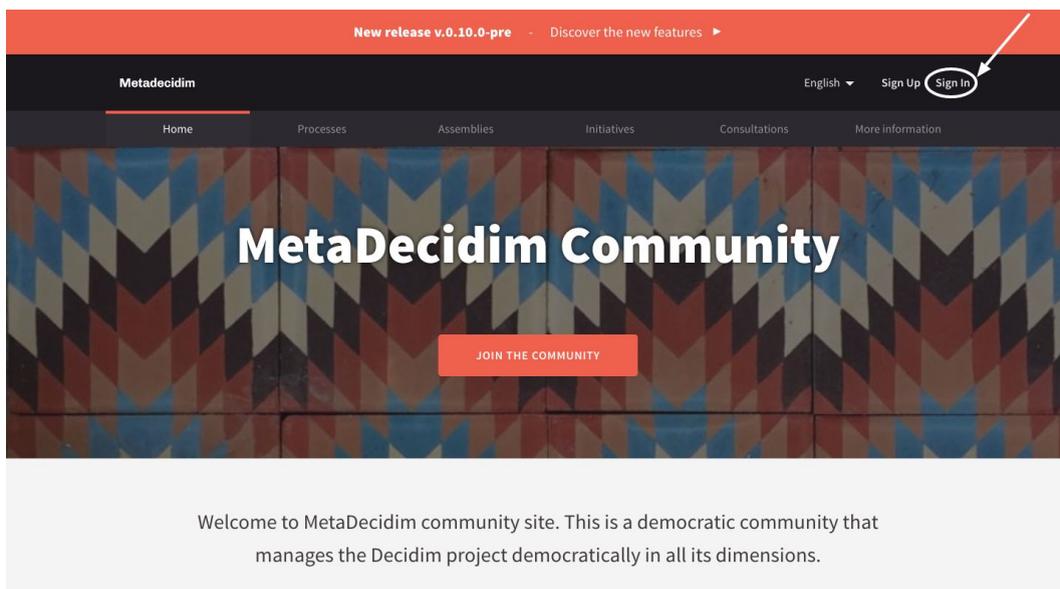
Figure 2 - MetaDecidim home page

In the **Log in** window (Figure 3) write **Email** and **Password** and click on **Log in**. Remember you will have to have been registered beforehand. Alternatively, you can sign in using your Twitter, Facebook or Google account.

To sign up, you can use the same window (Figure 3), by clicking on **Create an account** (in the upper part of the screen) or **Sign up** (in the lower part), or even on the home page by clicking on **Sign Up**.
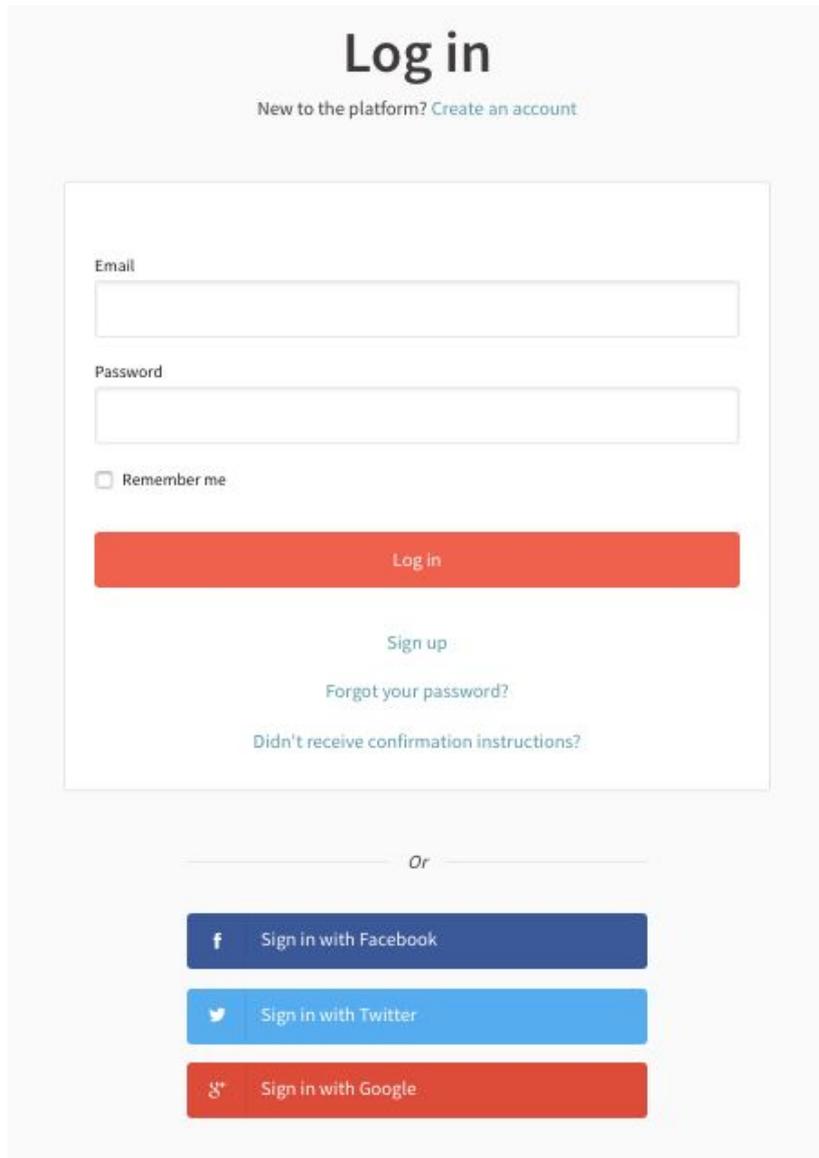
Figure 3 - Log In

Once inside the **Sign up** window (Figure 4), tick whether you are an **Individual** or **Organization/ Collective**, enter **Your name** (public name that appears on your posts. With the aim of guaranteeing the anonymity, can be any name), **Your short**

unique identifier in Decidim, Your email, password you will use, **confirm password** and tick **Receive an occasional newsletter with relevant information** box if you want to receive the information. To finish, click on **By signing up you agree to the terms and conditions of use** (available by clicking on the link), and click on **Sign up.**

Figure 4 - Sign up

It's also possible to sign up using Twitter, Facebook or Google accounts.

In addition, organizations should complete the cells: **Organization name, Organization document number** and **phone.**

Once you have finished your registration, you can complete your user-options settings such as additional information or notifications. Click on user name on the top right of the webpage. A drop-down menu will open (Figure 5), where you can access to: **My account, My public profile, Notifications, Conversations, Admin dashboard, Sign out.**
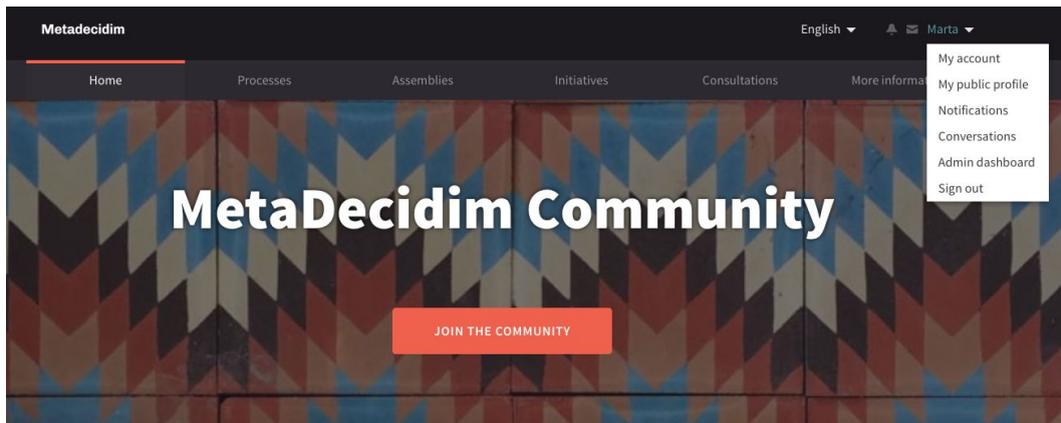
Figure 5 - Accessing the user-options menu

Click on **My account** to finish configuring your account settings or to modify them: to add an avatar/ image, change your name or e-mail address or set the level of notifications you wish to receive. The **User settings** window will open (Figure 6).
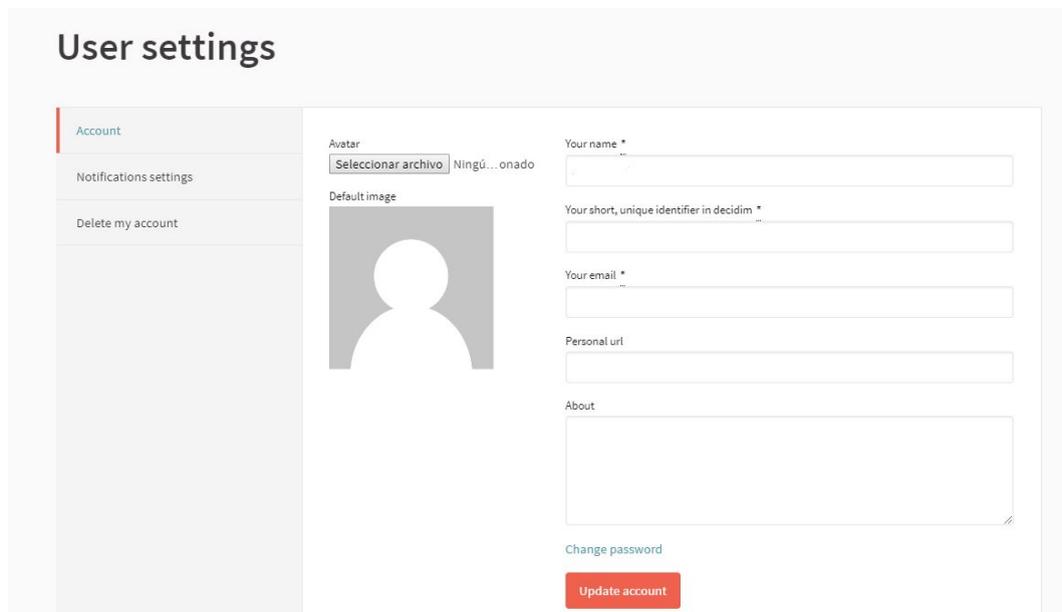
Figure 6 - User settings

To set your notification levels, click on **Notification settings** in the menu on the left of the screen and select **I want to receive an email every time i receive a notification** if you wish to receive an email every time you receive a notification and select **I want to receive newsletters** if you wish to receive information on a relevant activity (Figure 7).
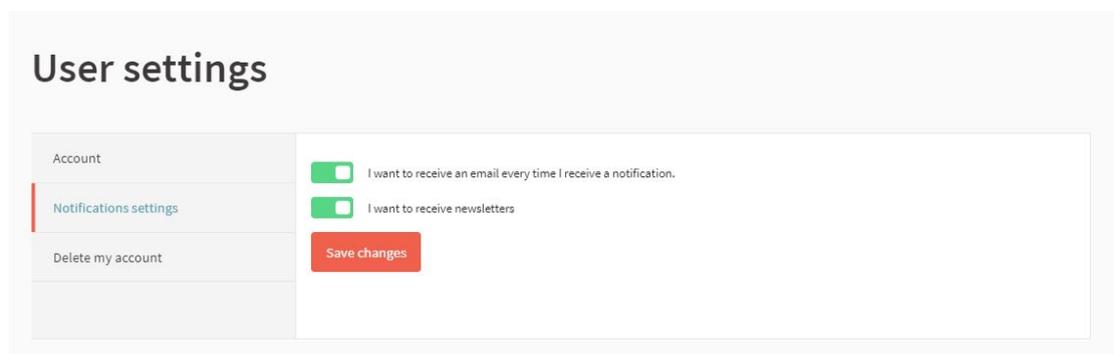
Figure 7 -Notification Settings

To access the administrator menu, click on the name on the top right of the webpage (in this case, **usuari1**) and select **Admin dashboard** from the drop-down menu. Remember that to access the administrator menu you will need to have your administrator authorisation configured.

The **Dashboard** (Figure 8) will open, allowing you to configure (by clicking on the options that appear in the menu on the left) the local authority's Decidim platform,

static pages, Participatory Processes and process groups, Assemblies and Councils, Initiatives and newsletters and manage users.
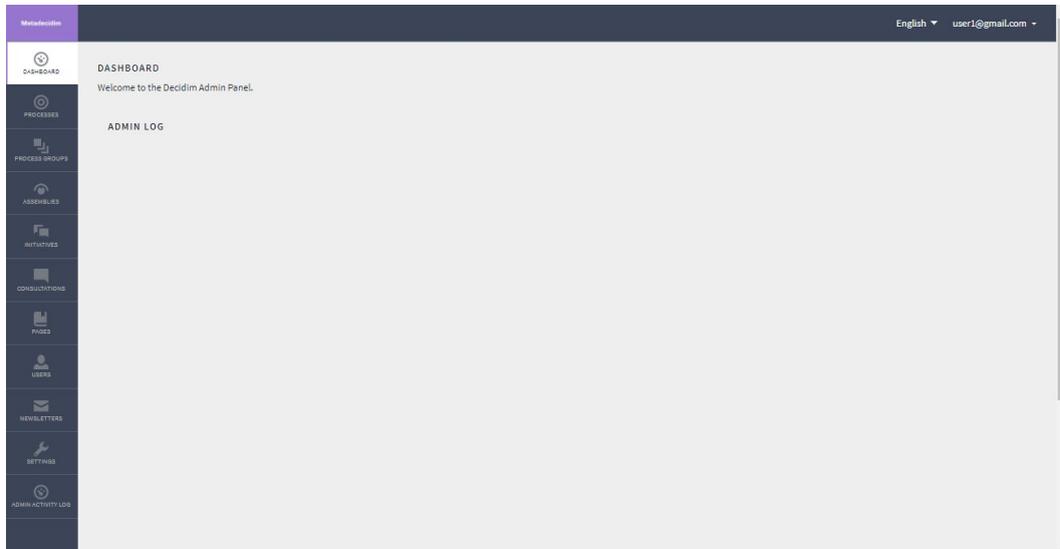
Figure 8 - Dashboard

3.2. Configuring a local authority's Decidim platform

To configure a local authority's Decidim platform, click on **SETTINGS** on the lower part of the **DASHBOARD**. A form will appear with information that has to be filled in and images that can be uploaded (Figure 9).
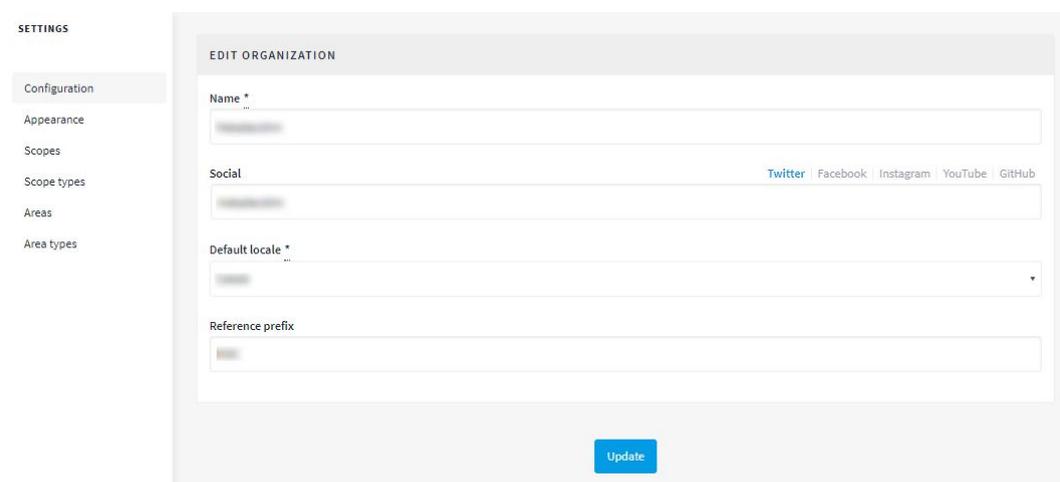
Figure 9 - Configuration window

The platform is multi-language although it is not automatically translated. If it has been decided that the platform is to be in two languages, for example, Catalan and Spanish, the fields will have to be filled in for both languages. For each of the text fields you will have to click on "**CA**" to enter Catalan text and "**ES**" to enter Spanish text.

The fields that have to be filled in are:

- Configuration window (Figure 9):

➔ **Name:** the name of the platform, for example **Formació Decidim**.

➔ **Social:** the social media profile name(Twitter, Facebook, Instagram, YouTube, GitHub). Only the ones that are used.

➔ **Default locale**: select the default language the platform is to be opened with.

➔ **Reference prefix**: unique identifier or acronym of the local authority's name that appears with the proposals, in face-to-face meetings, results etc.

-Appearance window (Figure 10):

➔ **Show statistics:** tick if you want statistics shown.

➔ **Description:** a brief introductory text beneath the main image.

➔ **Wellcome text**: slogan (brief phrase) which appears on the main image. In the example here: "Benvingut/da a la Formació Decidim!".

➔ **Call to action button path:** You can overwrite where the Call To Action button in the homepage links to. Use partial paths, not full URLs here. Accepts letters, numbers, dashes and slashes, and must start with a letter. The Call To Action button is shown in the homepage between the welcome text and the description. Example: https://meta.decidim.barcelona/processes/welcome

➔ **Call to action button text:** You can overwrite the Call To Action button text in the homepage for each available language in your organization. If not set, the default value will be used. The Call To Action button is shown in the homepage between the welcome text and the description.

➔ **Highlighted content banner:** Tick if you want the highlighted content banner shown. Also you are able to add the **Title,** a **Short description, Action button title, action button subtitle, Action button URL**, an **Image.** Also you are able to remove the file if you tick the **Remove this file** option.

➔ **Edit omnipresent:** Tick if you want the omnipresent banner shown. Also you are able to add a **Title,** a **Short description** and a **URL.**

➔ **Official organization URL**: institution's institutional website address.

→ **Header snippets**: use this field to add things to the HTML header. The must usual use is to integrate third-party services that require JavaScript or additional CSS code. What is more, you can use it to attach additional meta-labels to the HTML. Note that this will only be displayed on public pages and not in the administration section.

As for images, you are advised to see their availability beforehand on some of the Decidim platforms. The following images have to be uploaded:

→ **Homepage image**: homepage photograph/ image, at least 2880px wide x 1800px high. Also you are able to remove the file if you tick the **Remove this file** option.

→ **Logo**: the Decidim platform's corporate image, at least 456px wide x 148px high. Also you are able to remove the file if you tick the **Remove this file** option.

→ **Icon**: a page favicon or icon that enables the webpage to be identified, at least 80px wide x 74px high. Also you are able to remove the file if you tick the **Remove this file** option.

→ **Official logo header**: corresponds to the local authority's isotype, it will appear on the upper right part of every page on the platform, at least 271px wide x 88px high.

→ **Official logo footer**: local authority's isotype, appears in the lower left part of every page, at least 64px wide x 64px high.

Once you have finished, click on **Update.**
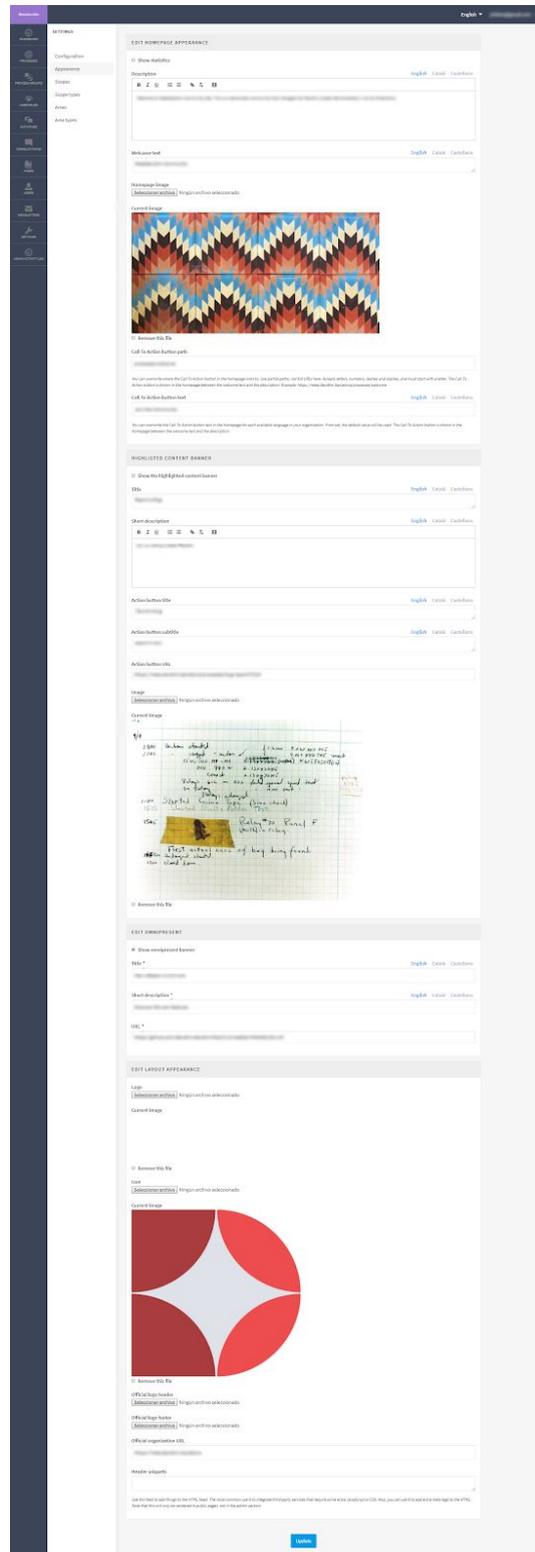
Figure 10 - Appearance window

To finish configuring the platform you will need to specify the areas, that is, the territorial organisation (districts, neighbourhoods, etc.,) and/or sectoral areas that the participatory processes can be linked to. The areas can be classed according to **scopes** where appropriate.

To configure scope types, go to the **SETTINGS**, submenu click on **Scope types** and then click on **ADD**. Fill in the fields **Name** and **Plural** (in Catalan and in Spanish) and click on **Create scope type** (Figure 11).

Figure 11 - Scope types

To configure scopes, go to the **SETTINGS** submenu and click on **Scopes**, and then add the areas one by one by clicking on **ADD**. For each of the areas you have to fill in the **Name** and **Code** fields (in Catalan and in Spanish), and select scope type from the **Scope type** drop-down menu. Then click on **Create scope** (Figure 12)**.**

Figure 12 - New Scope

Once created, the areas will appear on a list (scope name and type). If you click the icons on the right, the list allows you to **Browse**, **Edit** and **Destroy** each of the scopes (Figure 13).

Figure 13 - Scopes

3.3 Pages

This refers to the static pages that contain general information on the Decidim platform such as FAQs (What is *decidim*? How can I take part? How do I create and verify my account? What are participatory processes? etc.,) terms and conditions of use (legal and user information) and aspects relating to the platform's accessibility. Users and participants will be able to access this information from the **More information** tab (on the main menu), and from the footer.

To create and edit static pages, click on **PAGES** in the **DASHBOARD** menu**.** Then click on **Create** in the **PAGES** submenu or directly on the window that opens displaying the list of static pages once they have been created (Figure 14).

Figure 14 - Pages

If you click on the icons on the right, the list allows you to **View public page** how the pages will look as well as **Edit** and **Destroy** each of the pages.

When a page is configured you will have to fill in its fields (Figure 15): its **Title**, **Content** (the text it refers to) and the **URL slug** that identifies the page (for example, if the page is on accessibility: the word "accessibility" will appear at the end of the webpage address, https://decidim.diba.cat/pages/accessibility). To finish, click **Create.**

For the purposes of drafting the content of the static pages you can view and freely use the texts in Annexe I.
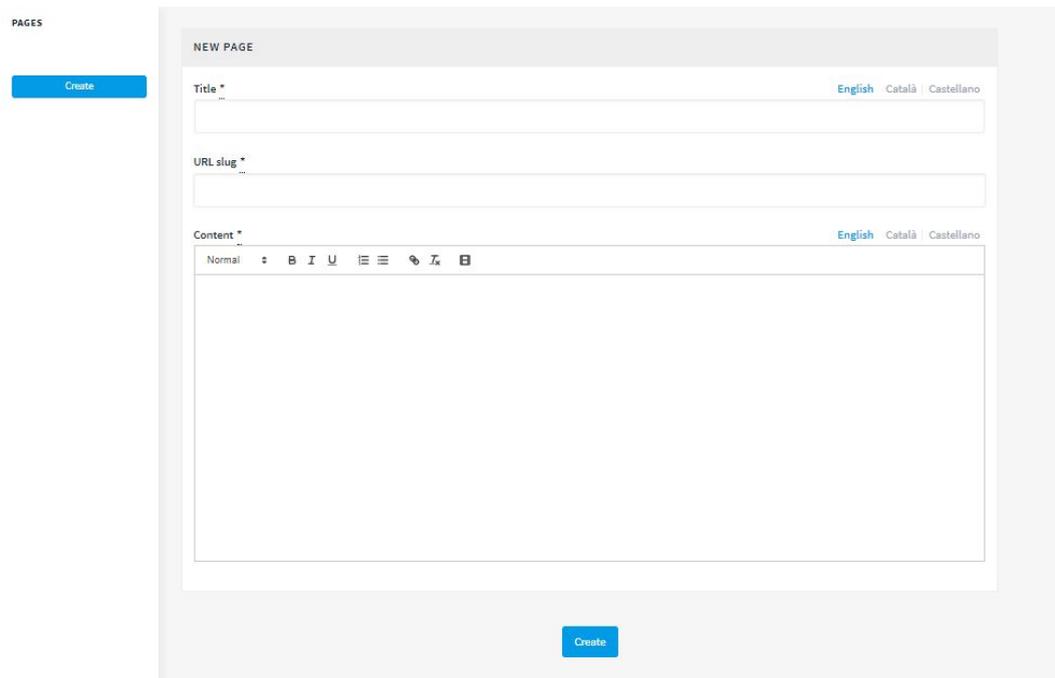
Figure 15 - New page

3.4   Users

Managing administration users involves such tasks as: registering other administrators; validating user groups (organisations/ collectives) that have been registered and whose effective existence has been confirmed; managing temporary users created from Citizen Help and Information Offices to enable people who have no internet to take part in Decidim: recognising that a person has a certain position in the organisation (*Oficializations*) and authenticating that the person taking part is who they say they are (*Verifications*).[6]

To manage users, click on **USERS** in the **DASHBOARD** menu. The **USERS** window will open (Figure 16).

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[6]   The **Verifications** function is currently under development .

Figure 16 - Users

To register an administrator, click on **Admins** in the **USERS** submenu. A list of those that are already administrators will appear; click on **New** in the upper right of the screen. A screen will open (Figure 17) whose **Name** and **Email** fields have to be filled in and **Role** selected from the **(Admin** or **User manager)** drop-down menu. To finish, click **Invite.**

Figure 17 - Invite user as administrator

To validate a user group, go to **User groups** in the **USERS** submenu. A new window will open (Figure 18) displaying a list with all the user groups that have been registered, respective numbers of documents, telephone numbers, user numbers, creation date, status (verified, rejected or pending) and possible initiatives (**Verify** or **Reject**).

Figure 18 - User groups

User groups can be directly validated in this window, once their existence has been confirmed, by clicking on the corresponding **Verify** icon. To facilitate management the user groups can be filtered according to whether they are verified, rejected or pending, by selecting from the **Filter by** drop-down menu.

To publicly accredit (*officialise*) that a person has a certain position/ post in the organisation, click on **Oficializations** in the Users submenu. The **OFICIALIZATIONS** window (Figure 19) will open, displaying a list with some of the users and the initiatives that can be carried out: **Officialize**, and where the person has already been officialised, **Reofficialize** or **Unofficialize**.

Figure 19 - Officializations

To officialise a person and post, filter by name and click on the **Officialize** action. The Officialize User "X" window will open (Figure 20), where you will have to insert the **Officialization badge** (the position that is recognised).

Figure 20 - Officialize user

To manage managed users (impersonally temporary with previous identification), click on **Managed Users** in the **USERS** submenu [the appropriate authorisation has to be granted from management of administrators before this action can be carried out.

3.5   Processes

To configure participatory processes on the Decidim platform, click on **PROCESSES** in the **DASHBOARD**. A list will appear with the existing processes, if there are any (Figure 21).
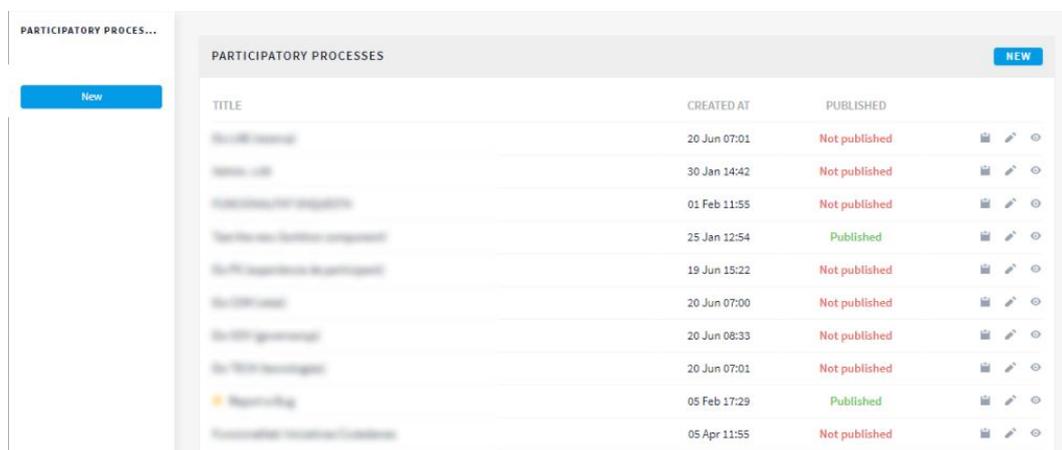
Figure 21 - Participatory processes

The created at date is shown for each of the processes, whether or not published, and the following actions can be performed by clicking on the corresponding icons: duplicate the process; configure and preview how it will look once published.

The information on the processes can be edited by clicking on the **Configure** icon or name of the process.

To create a new process, click on **New** in the **PARTICIPATORY PROCESSES** submenu or on the upper right part of the window (Figure 21). A window will open where you have to enter general information on the process (See 5.1 Information). The process (stages, users, functions etc.,) is configured through the submenu of the process that appears when you click on a process on the process list screen (Figure 22). This submenu is on the left of the process window.

Figure 22 - Participatory process submenu

3.5.1 Information

You first have to fill in the fields with general information on the process. Click on **PROCESSES** in the **DASHBOARD** and click on **New** in the **PARTICIPATORY PROCESS** submenu on the upper right of the window that appears with the list of processes. A **NEW PARTICIPATORY PROCESS** window will open (Figure 23).

Figure 23 - New participatory process

Fill in the following fields (remember that where the platform is in two or more languages, you will need to fill in the information in all the languages):

➔ **Title**: enter the name of the participatory process

➔ **Subtitle**: enter the name of the subtitle.

➔ **URL slug**: word identifying the webpage where there is general information on the process. For example, "nomdelprocés", https://decidim.nomdelmunicipi.com/processes/**nomdelprocés**.

➔ **Hashtag**: a tag for social networks. The same one that will be used on network campaigns, Twitter, Facebook, Instagram, etc. (a single word).

➔ **Start date**: select the corresponding date on the calendar that appears when the Data d'inici box is clicked on.

➔ **End date:** select the corresponding date on the calendar.

➔ **Promoted**: tick whether you wish to highlight the process on the platform's home page.

➔ **Short description**: 600 characters maximum, explaining the participatory actions.

➔ **Description**: from 1600 characters "llegir més" (read more) is displayed.

➔ **Home image**: image associated with the participatory process that appears on the general process page (Figure 24) and on Decidim's home page, where the **promoted** option has been ticked (Figure 25). Minimum sizes: 1015 px. wide x 667 px. high.

➔ **Banner image**: image for all the pages of the process, published on the upper part of the pages, from left to right (Figure 26). Minimum sizes: 1200 px. wide x 300 px. high.

➔ **Developer group**: manager and person politically responsible for the participatory process, can only be the City Council or a group made up of City Council professionals and politicians and associations, enterprises, city residents and other entities.

➔ **Local area**: areas of the City Council involved in the participatory process.

➔ **Scope metadata**: this is not displayed, being internal information about which area of the city the process is aimed at.

➔ **Target**: individuals the participatory process is aimed at.

➔ **Scopes enabled**: tick whether you wish to identify with a sphere of action (municipal, district 1, district 2 and so on).

➔ **Scope:** select the corresponding scope from the drop-down menu. The scopes will need to have been created beforehand.[7]

➔ **Participatory scope**: explanation of the decision margin or limits that citizens will have in this process.

➔ **Participatory structure**: promoter group, monitoring committee, working group, entities that will be taking part in the participatory process's various workshops and meetings.

➔ **Processes group**: where this is a process within a group, select the corresponding process group from the drop-down menu. For example, an Action Plan by District, within a Municipal Action Plan. The group must have been created beforehand. If it is not part of any group, select **None** from the drop-down menu.

➔ **Show statistics**: tick whether you wish to display the process's statistics (Number of meetings, proposals and so on) on the process' main page.

➔ **Announcement**: if you want a paragraph displayed with a specific announcement (for example, if a new stage begins in any participatory process).
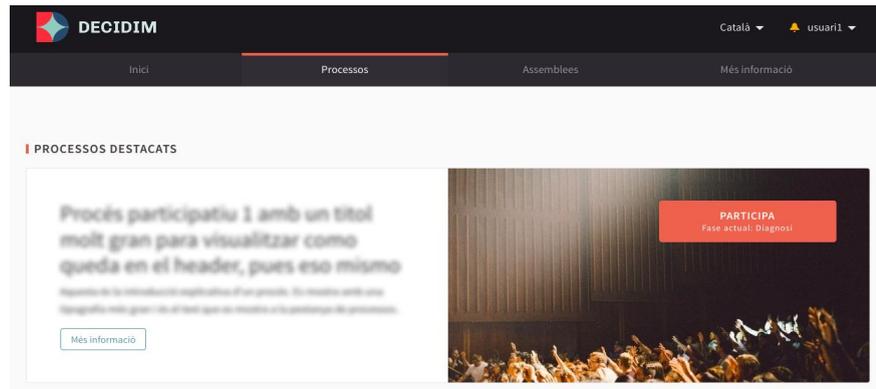
Figure 24 - Image of general processes' front page

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[7]   On creating scopes, see point 2.
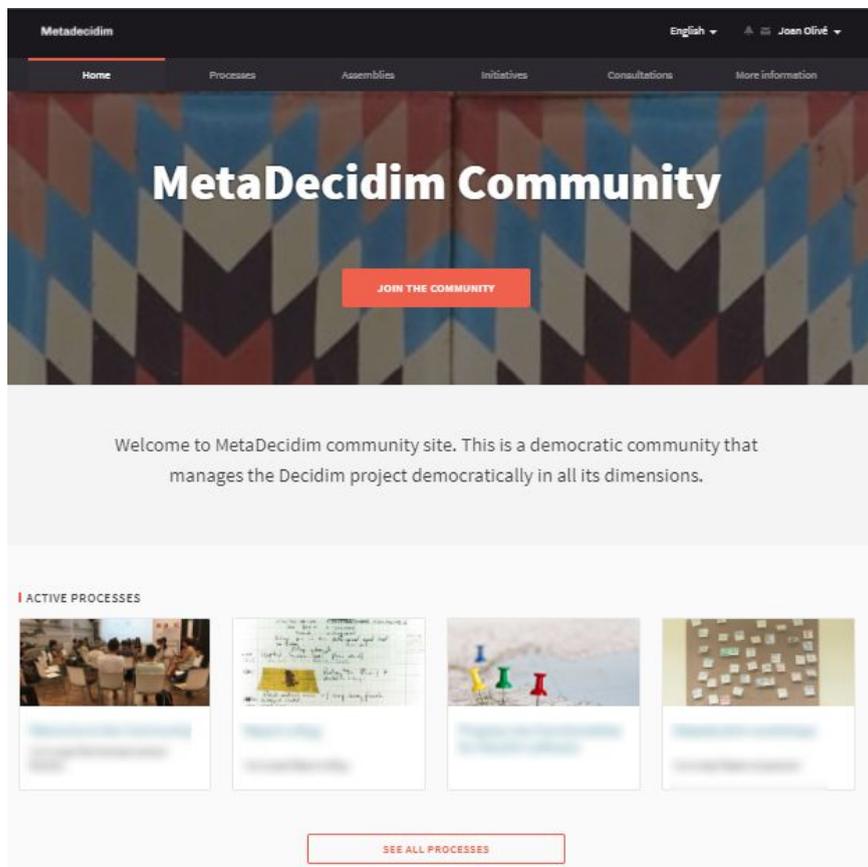
Figure 25 - Image of Decidim homepage's front page
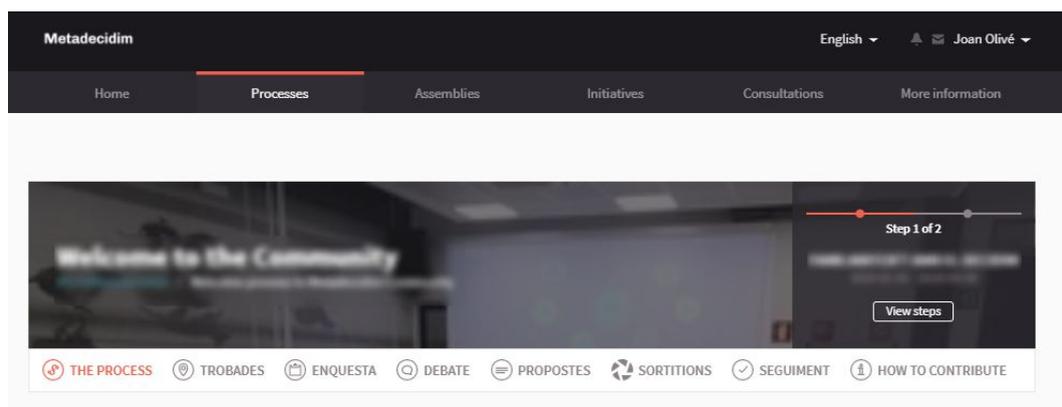
Figure 26 - Banner image

To finish, click on **Create.** You can see how all this information will be displayed by clicking on the process's corresponding **Preview** icon.

To finish configuring the process, click on the project's name in the window with the list of processes. A window with general information on the process will open and

the process's submenu will appear, allowing you to configure the process's stages, functions, categories, users, moderations and attached information.

3.5.2 Stages of the process

A participatory process will be reflected on the Decidim platform at different stages, each with a start date and finish date, both pre-established at the beginning, so that citizens are clear about where the process is at and how they can take part in it at any time.

As a guideline, the standard structure of a participatory process may be as follows: Stage 1: presentation; Stage 2: diagnosis; Stage 3: proposal creation and debate; Stage 4: prioritisation of proposals; Stage 5: selection of results; Stage 6: assessment; Stage 7: monitoring.

To configure the stages of the process, click on **Steps** in the **PARTICIPATORY PROCESS** submenu and then click **NEW**. A **NEW PARTICIPATORY PROCESS STEP** window will open (Figure 27).

You need to enter the following for each of the stages:

→ **Title**

→ **Description**

→ **Start date and end date**

Once you have done that, click on **Create.**

Figure 27 - New participatory process step

To activate the stage the process is at, click on **Steps** from the **PARTICIPATORY PROCESS** submenu. A window will open showing all the stages of the process that have been configured and the icons that enable you to **Activate**, **Edit** and **Destroy** each of them. Click on **Activate** at the corresponding stage (Figure 28).
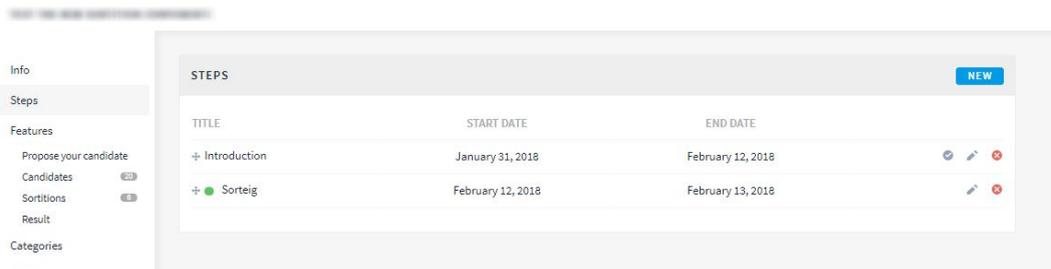
Figure 28 - Process steps

Users will be able to display the various stages and descriptions that have been configured, by clicking on **View steps** (in the flag image, on the right). The stage that is active will be highlighted in red (Figure 29).
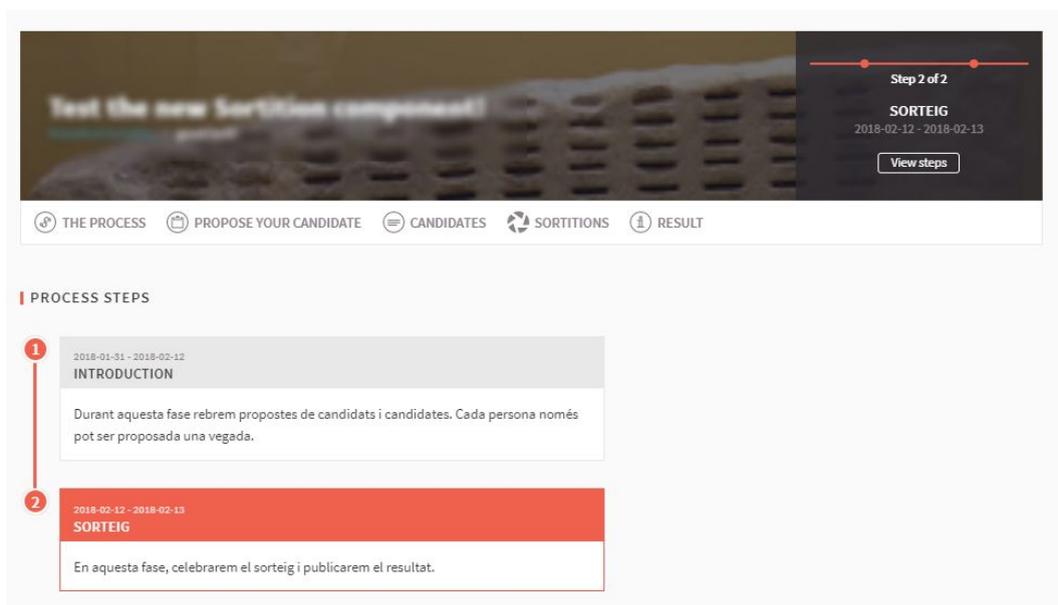
Figure 29 - Displaying steps of the participating user process

3.5.3 Categories

Categories (and subcategories) are used for classing contents within the various participatory spaces/ processes, as well as enabling users to filter contents. They are defined for each of the instances of the spaces. For example, a participatory space can include several categories and subcategories and meetings, surveys,

proposals and other components of the process can be classed under these categories. A category could be Environment and two of its subcategories Mobility and Air quality. Figure 30 shows the categories and subcategories that were used in the participatory process for drafting the Barcelona Municipal Action Plan (PAM) for 2016.

Figure 30 - Categories and subcategories in the Barcelona PAM for 2016

Note that once the categories have been defined, you cannot change them as they become the index that structures the contents inside a participation space. For example, if there is a participatory process for electing candidates, the categories could identify lists or types of candidacies. And where the process is for defining a Plan, the categories would coincide with the index for this Plan.

Note too that when it comes to classing contents, Decidim also allows scopes and labels (or tags) to be distinguished and configured. Unlike categories, (territorial or thematic) scopes are general throughout the platform and are defined during the configuration of the Decidim platform of the local authority/ entity.[8] Whereas labels (or tags) are freely defined by participants and can apply to any instance or component. The administration panel also allows you to create and nest labels.

For configuring categories, click on **Categories** in the **PARTICIPATIVE PROCESS** submenu**.** Then click on **NEW** below. You need to enter the following for each of the categories/ subcategories (Figure 31): **Name** and **Description** and, where a subcategory is involved, select the category it corresponds to from the **Parent** drop-down menu. To finish, click on **Create category**.
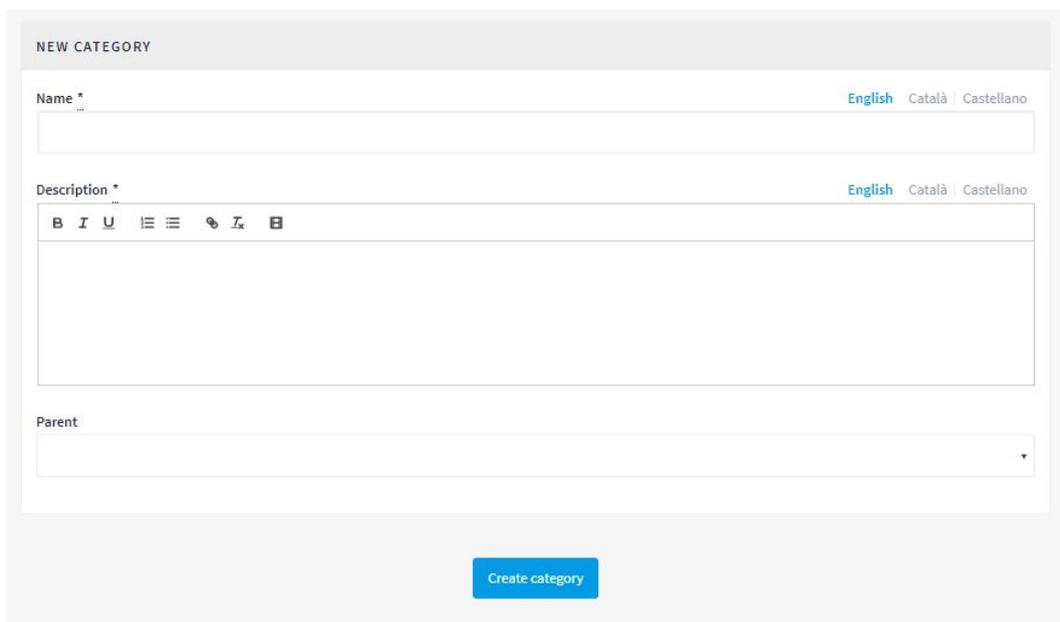
Figure 31 - New category

3.5.4 Attachments: Collections and Files

When a participatory process is launched, it is important to provide citizens with as much information as possible about them so that they can participate with knowledge. That is why it is helpful to add files (Attachments) with the information that is considered relevant.

These documents can be classified/ grouped in **Collections**. For example, for a process of remodeling a place, collections could be created with information about possible uses, with plans, with economic information, etc.

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[8]   On how to create scopes, see point 2.2.

First you need to create the collections to be able to place the attachments later. Click **Collections** in the submenu of the PARTICIPATORY PROCESS, the window is shown **ADVANCED COLLECTIONS** (Figure 32).
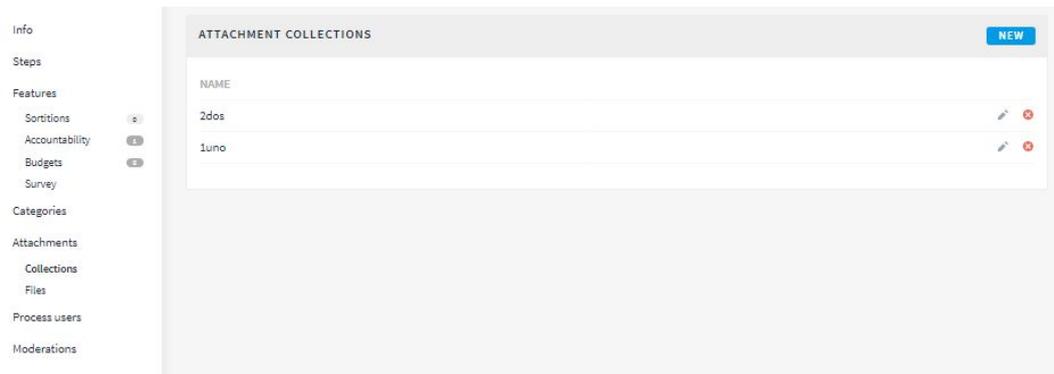
Figure 32 - Attachment collections

Then click on **NEW** to create a new collection. Add **Name, Weight** and a **Description**. To finish, click **Create attachment** (Figure 33).
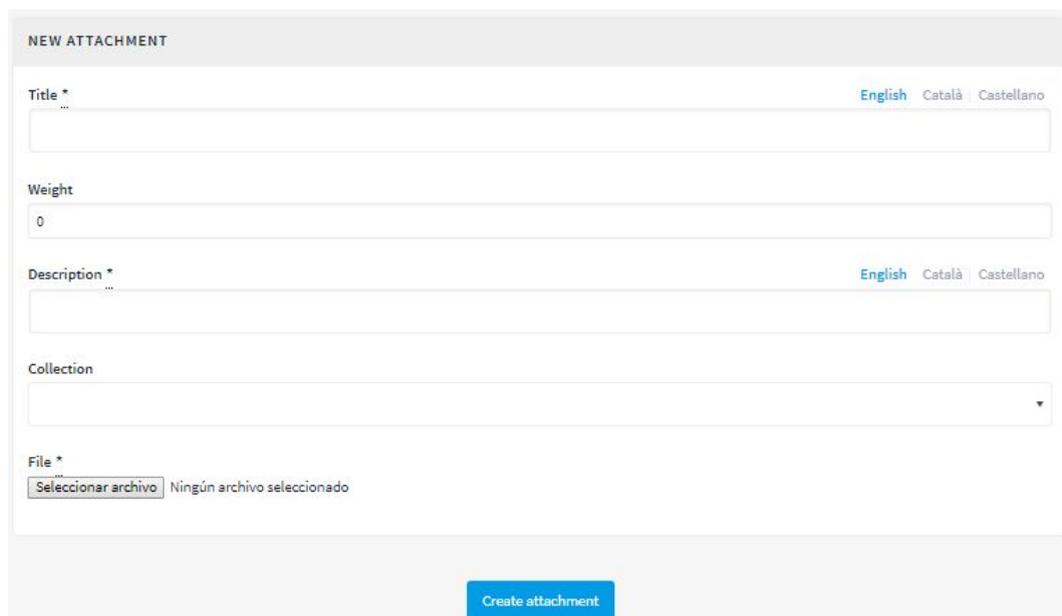
Figure 33 - New collection

Once the collections have been created, the attachments can be added. Click **Files** in the sub-menu of the **PARTICIPATORY PROCESS** and click **NEW** to add the files. The **NEW ATTACHMENT** window opens (Figure 34). Write the **Title** and the **Description**, select the **Weight** and the **Collection** which you want to associate the file, and upload the file by filling the **File** option. To finish click **Create attachment.**
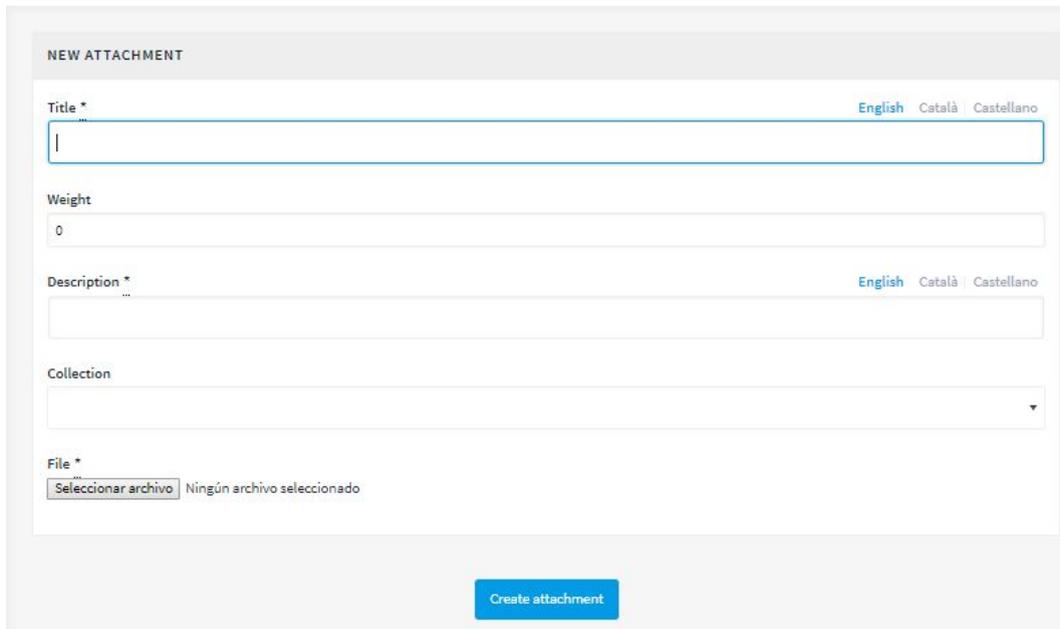
Figure 34 - New attachment

3.5.5 Process' users

Authorisation may be given to other individuals, besides the platform's general administrators, so that they can administer or collaborate in a certain process or moderate where there are contents that have been reported.

The process **administrators** can configure/ edit a process whereas **collaborators** can only see what is on the administrator menu of the process without being able to configure/ edit.

To register administrators, collaborators and/or moderators of a process, in the process's submenu, go to **Process users** and click on **NEW**.

A **NEW PARTICIPATORY PROCESS USER** window will open (Figure 35)**.**
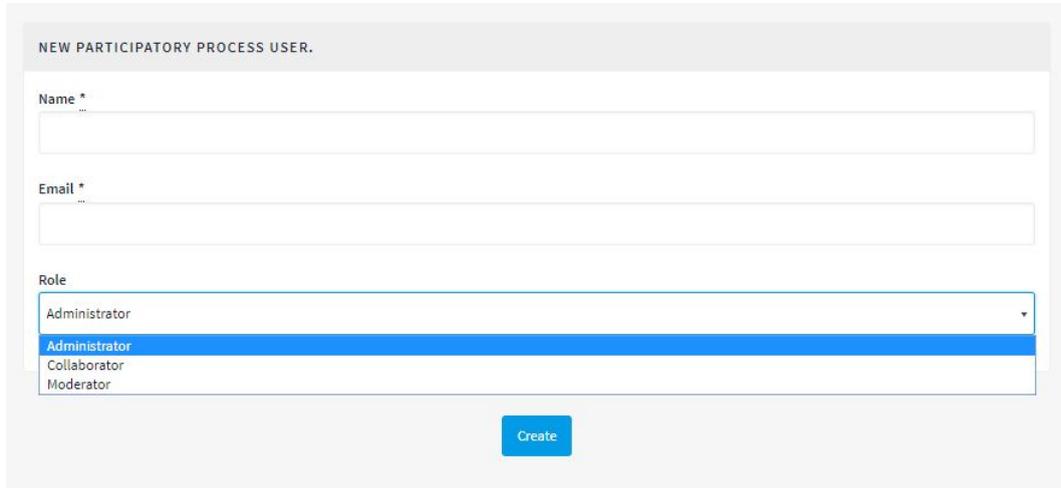
Figure 35 - New participatory process user

You need to fill in the following fields: **Name**, **Email** and **Role** (select from the **Administrator**, **Collaborator** or **Moderator** drop-down menu). Click on **Create** immediately afterwards

3.5.6 Moderating

The **Moderation** function allows you to moderate debates and ensure they are democratic and constructive. Making use of this function, administrators, collaborators and the moderator of a process can hide the contents/ contributions that have been reported, where the complaint is deemed appropriate, or delete the complaint.

Contents are generally deemed reportable where they are offensive, can be regarded as spam (advertising posts whether or not related to the discussion topic, links to malicious websites, trolling, abusive or unsolicited information), or have nothing to do with the subject under discussion.

To manage reported contents, click on **Moderations** from the process's submenu. A screen will appear with all the comments that have been reported pending moderation and the following information for each of them (Figure 36):

➜ **Reportable**: where this concerns a **Proposal** or **Comment**.

➜ **Reported content URL:** link for seeing the content reported and the reasons for the complaint.

➜ **Reports**: why it has been reported. It could be: because: it has nothing to do with the discussion ("*does_not_belong*"), it is spam or it is an offensive comment*)*.

➔ **Count:** Number of times it has been reported by different users

➔ **Actions:** by clicking on the items on the right you can **Unreport** or **Hide.**

MODERATIONS				NOT HIDDEN | HIDDEN
REPORTABLE	REPORTED CONTENT URL	REPORTS	COUNT	ACTIONS
Proposal	Visit URL	Does not belong	1	

Figure 36 - Moderations

Reported contents that have already been concealed can be seen by clicking **NOT HIDDEN** (in the upper right of the moderator box). A list of concealed reported contents will appear, with the following information for each of them (Figure 37): REPORTABLE, REPORTED CONTENT URL, REPORTS, COUNT, HIDDEN AT date (date the content was concealed on), ACTIONS (in this case the action available is **Unreport**).

To return to visible reported contents, click on **NOT HIDDEN** on the upper right of the moderations.

MODERATIONS					NOT HIDDEN | HIDDEN
REPORTABLE	REPORTED CONTENT URL	REPORTS	COUNT	HIDDEN AT	ACTIONS
Comment	Visit URL	Spam	1	February 05, 2018 19:32	
Comment	Visit URL	Spam	1	February 05, 2018 19:32	

Figure 37 - Hidden content

3.5.7 Features/ Components

Participatory processes currently have the following components:

➔ **PAGE**: Static pages with multi-language support which optionally allow comments and iframes to be added.

➔ **MEETINGS**: meetings in person, in other words face-to-face events included in a process.

➔ **PROPOSALS**: written contributions posted by users on the platform, which can be voted on.

➔ **BUDGETS**: a specific module for deploying a participatory budget process. This allows a minimum percentage of the total budget to be set for supporting submitted projects.

➔ **SURVEY**: for conducting surveys.

➔ **ACCOUNTABILITY**: follow-up files for initiatives, projects, plans etc. This enables other components such as proposals and face-to-face meetings to be added.

➔ **DEBATES:** for conducting debates.

➔ **SORTITIONS**: This allows the people who will form part of a group (such as a committee) to be selected at random from a larger group.

To configure components, click on **Features/ Components** from the **PROCESSES** submenu. A list will appear showing the functions that have already been configured by the process (the **FEATURE/ COMPONENT NAME** (which it is given) and the **FEATURE/ COMPONENT TYPE** that has been used for creating it (Figure 38).

The icons in this list enable you to carry out the following actions: **Manage**, **Publish**/ **Unpublish**, **Configure**, and configure **Permissions** and **Destroy** the feature/ component**.**
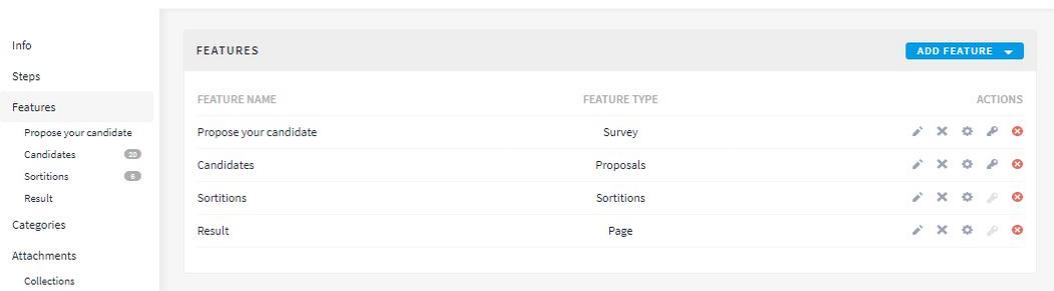
Figure 38 - Features/Components

To configure a new function, click on **Add feature/ component** from the upper right part of the window and select the type of function you wish to configure from the drop-down menu (Figure 39).
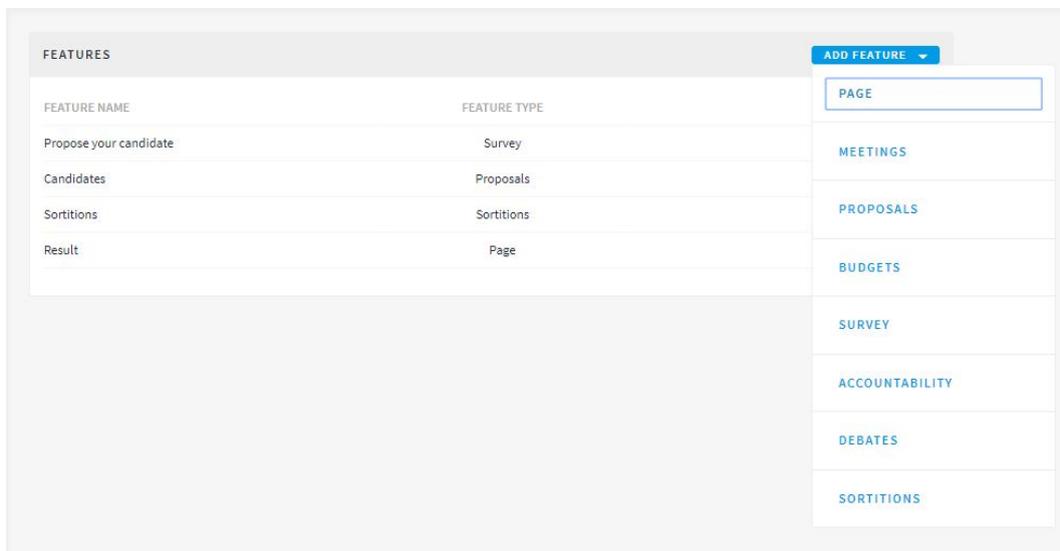
Figure 39 - Add feature/ Component

Page

These are pages with information on the various processes that may describe the process and its stages, participation methods, goals etc.

To add a page, click **Page** in the **Add feature/ Component** drop-down menu. The **ADD A FEATURE/ COMPONENT: PAGE** window will open**:** where the following fields have to be filled in (Figure 40):

➜ **Name**: name of the page.

➜ **Weight**: This corresponds to the order in which the components (in this case, the page) are displayed in the participatory process menu.

➜ **Global settings**: enter the content of the message here only if you want to display an **Announcement** on the **Page** (highlighted message).

➜ **Step settings**: enter the content of the message in the stage it is meant to appear in, if you only want to display an **Announcement** on the **Page** (highlighted message) during the execution of a stage.

Then click on **Add feature/ Component.**

Figure 40 - Add feature/ Component: page

To create/ edit the contents of the configured page, go to the submenu on the left of the participation process, **Features/ Component**, and click on the **page name** (the name that the page has been given).

The Edit page will open. Enter the page's content in the **Body** box. Once you have done that, click on **Update** (Figure 41).
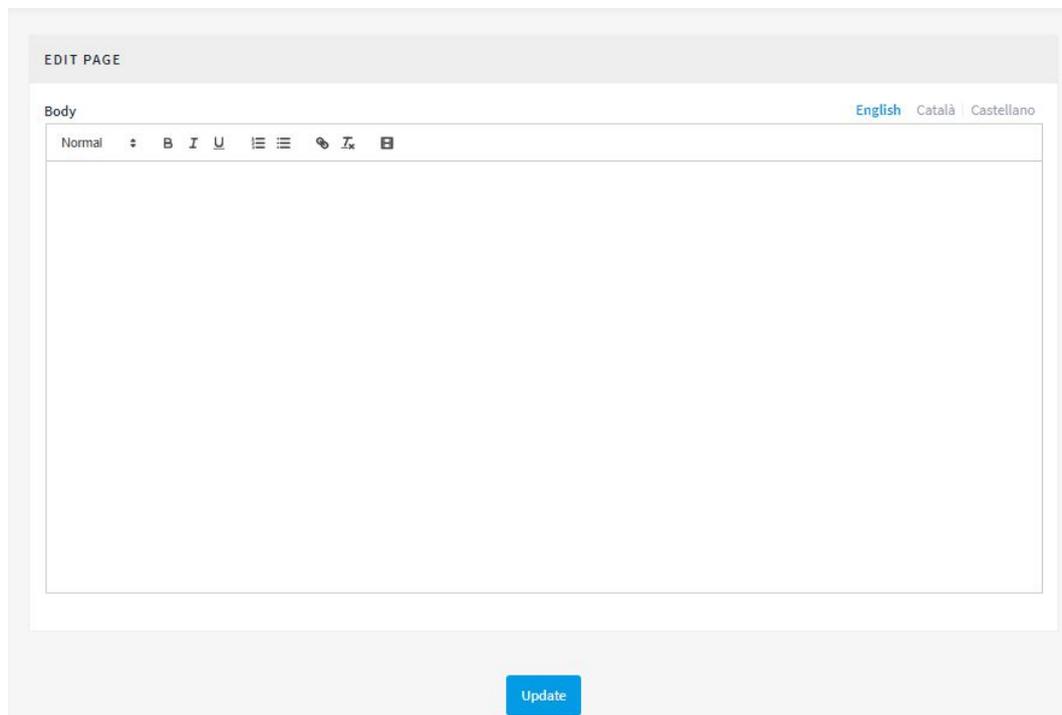
Figure 41 - Edit page

You can also edit the page or change its settings from the **Features/ Component** window (Figure 38), by clicking the corresponding (**Manage** and **Configure**) icons. This window will likewise allow you to **Publish**/ **Unpublish** or **Destroy** the page.

Meetings

To add face-to-face events, you must first configure the **Meetings** function**.** Go to the **Add feature/ component** drop-down menu (Figure 39) and click on **Meetings**. The **ADD FEATURES/ COMPONENTS: MEETINGS** window will open (Figure 42).

You need to give a **Name** to the Trobades function, select **Weight** (position in the process's menu), and enter **Announcement**, where appropriate, in **Global settings** and **Step settings**, and tick (by clicking) **Comments enabled** so that the process's participants can make comments on the meetings or **Comments blocked**.

Click on **Add feature/ Component** immediately after.

Once the **Meetings** function has been configured, you can create meetings. Go to the submenu on the left of the participatory process, to **Features/ Components** and click on *MeetingName* (the name that the function has been given). The **MEETINGS** window will open with the list of meetings that have been previously created (Figure42).
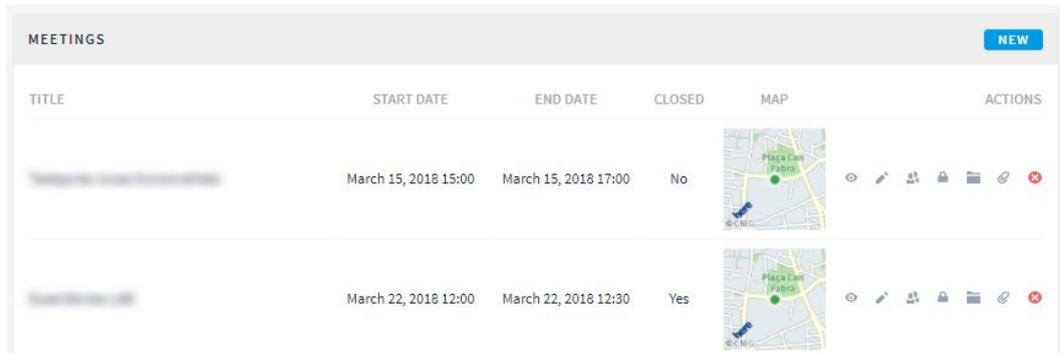
Figure 42 - Meetings

The window allows you to perform the following actions by clicking on the icons:

➔ **Preview** how the publication of the meeting will look

➔ **Edit**

➔ **Registrations** settings

➔ **Close** the meeting once it is finished

➔ Add **Attachments**

➔ Add **Collections**

➔ **Delete**

To create a meeting, click on **NEW** in the upper right part of the **MEETINGS** window (Figure 43). The **ADD FEATURES/ COMPONENTS: MEETINGS** window will open:

Figure 43 - Add features/ Components: meetings

The information that has to be edited where a meeting is created is (Figure 44):

➔ **Title**

➔ **Description**

➔ **Address**: Street name, number, post code and city)

➔ **Location**: Name of the building and room where the meeting will be held etc.

➔ **Location hints**: where necessary, how to get there, floor, block etc.

➜ **Start time**: select the date and time on the calendar it appears on by clicking on the field.

➜ **End time**: as above

➜ **Category**: where necessary, select the category from the drop-down menu.

Figure 44 - Create meeting

To activate meeting registrations, go to the **MEETINGS** window (Figure 42), and click on the **Registrations** icon. An **Inscripcions** window will open (Figure 45), where you need to click on **Registrations enabled**, select the available seating capacity from the **Available slots** drop-down menu (leave it at 0 if there is an unlimited number), and enter the details in **Registration terms**. To finish, click **Save**.

The window lets you export the registrations in CSV, JSON or EXCEL format, which you can select from the **Export** drop-down menu.

Figure 45 - Registrations

If you wish to attach a file to the information on the meeting, go to the **MEETINGS** window (Figure 42) and click on the **Attachments** icon. The **Attachments** window will open (Figure 46), where a list will appear if there are other attached files and where you can **Edit** or **Delete** the attached files.

Figure 46 - Attachments

Click on **NEW** to attach a file. Then, in the **NEW ATTACHMENT** window (Figure 47), enter the **Title** and **Description**, upload the file (by clicking on **Seleccionar archivo**). To finish, click on **Create attachment.**
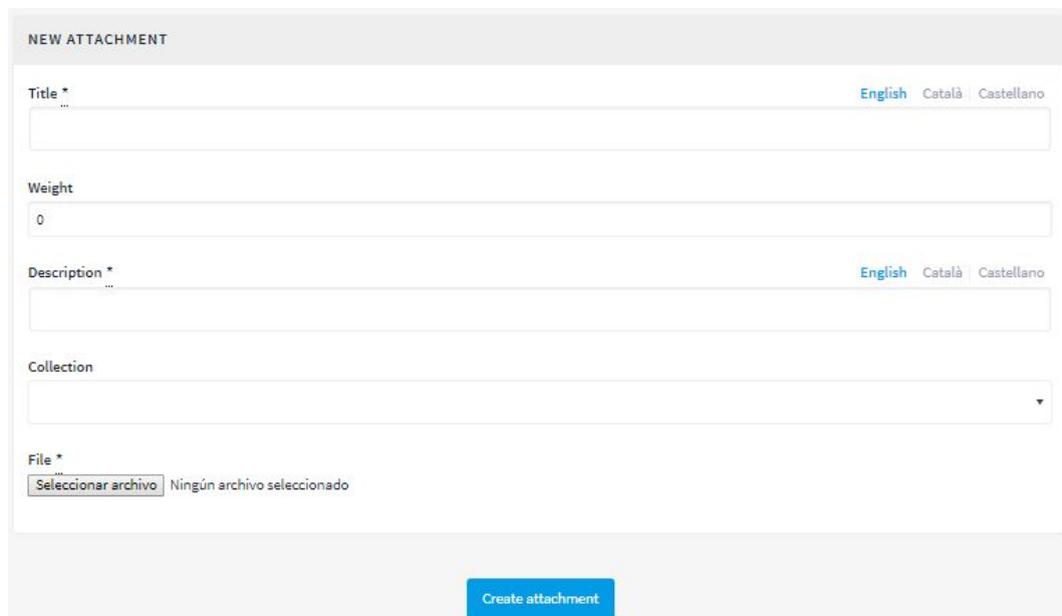
Figure 47 - New attachment

Proposals

To configure the **Proposals** function, go to the **PROCESSES** submenu and click on **Features/ Components,** then click on **Add feature/ Component** in the upper right part of the window and select **Proposals**. The **ADD FEATURE/ COMPONENT: PROPOSALS** window will open (Figure 48)**.** The information you need to enter when the proposal function is configured is:

➜ **Name:** Name of the proposal

➜ **Weight:** the order in which the **Proposals** component is meant to be displayed on the participatory process's menu.

➜ **Global settings:**

◆ **Vote limit per user:** Select, where necessary, the limit on the number of votes that a user can give.

◆ **Proposal limit per user:** Maximum number of proposals that can be made by the users.

◆ **Maximum proposal body length:** Select the maximum number of characters that the text of the proposal can have in the menu. 500 characters come by default.

◆ **Proposals can be edited by authors before this many minutes passes:** time limit during which the authors of the proposals can modify them. By default it is 5 minutes, it is advisable not to leave

too much time because if someone supports the proposal or makes a comment it will no longer be modifiable.

◆ **Maximum votes per proposal/ Threshold per proposal:** maximum number of votes that can receive the proposals.

◆ Tick the options that you want activated for the general configuration of the Proposals function: **Can accumulate supports beyond threshold, Proposal answering enabled, Comments enabled, Geocoding enabled, Allow attachments.**

◆ **Announcement:** enter whether you wish to display a notice when users are making a proposal**.**

◆ **New proposal help text:** Write if you want to show when the user is making a proposal.

◆ **Proposal wizard "Create" step help text:** Idem.

◆ **Proposal wizard "Compare" step help text:** write when similar proposals are shown.

◆ **Proposal wizard "Publish" step help text:** notice that comes before publishing the proposal, in case you want to edit.

➔ **Default step settings:**

◆ Tick the options you wish to activate for each of the stages: **Endorsements enabled, Endorsements blocked, Votes enabled, Votes blocked, Votes hidden, Comments blocked, Proposal creation enabled, Proposal answering enabled.**

◆ **Announcement:** enter whether you want to display a notice when users are making a proposal**.**

To finish, click on **Afegir feature/ Component**.

Figure 48 - Add feature/ Component: proposals

To manage proposals, that is, to accept/ reject proposals made by participants during the process, click on **PROPOSALS** from the **PROCESSES** submenu. A **PROPOSALS** window will open (Figure 49), where there is a list with all the proposals and a series of pieces of information for each one (**TITLE, CATEGORY, ESTATE,** in other words, if it is **Accepted, Withdraw, Not answered**, or **Evaluating**, and the possible **ACTIONS** (**Private notes, Answer,** and **Preview**).

Figure 49 - Proposals

To respond to proposals, click on the **Answer** icon, the **ANSWER FOR PROPOSAL** (Figure 50) window will open where you need to tick **Accepted**, **Rejected,** or **Evaluating** and enter the reason or response that you wish to give in the **Answer** box.

Figure 50 - Answer for proposal

You can also export proposals and/ or comments in CSV, JSON or EXCEL formats, by clicking on **EXPORT** in the upper right part.

To create a new proposal, in other words, to make official proposals, click on **NEW** in the upper right part of the **PROPOSALS** window (Figure 49), and the **CREATE PROPOSAL** window (Figure 51) will open up, where you need to enter: **Title** and **Body.**. Then click on **Create.**
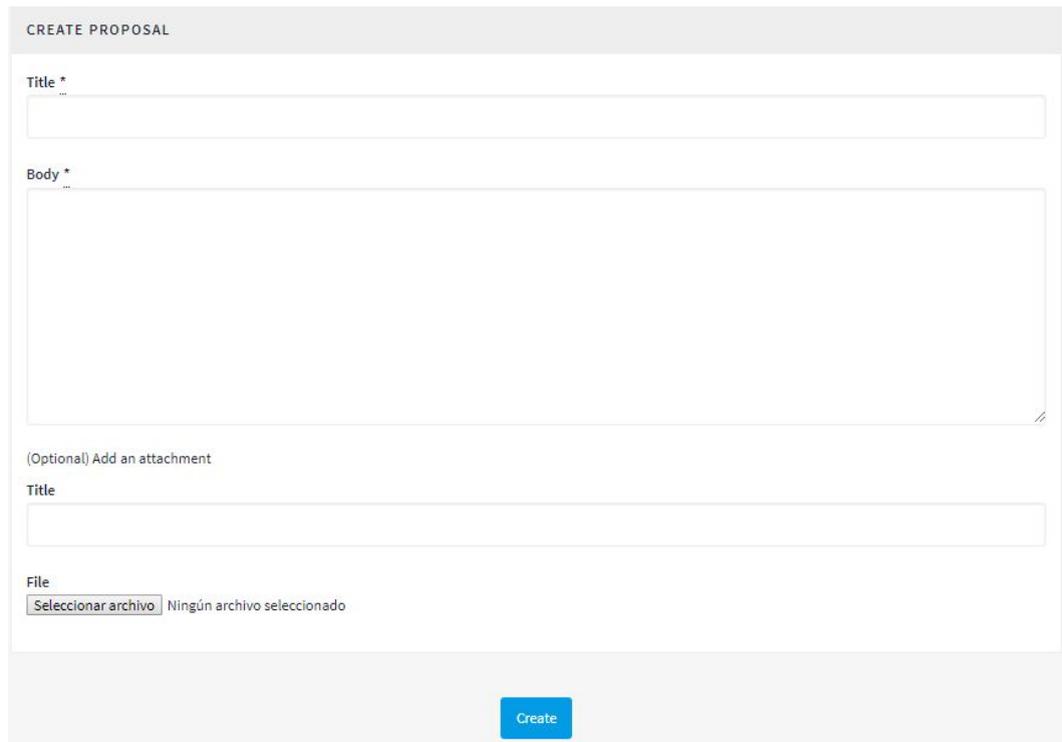
Figure 51 - Create proposal

Budgets

To configure the participatory budget function, go to the **PROCESSES** submenu, click on **Features/Components** click on **Add feature/ Component** in the upper right part of the window and select **BUDGETS**. The **ADD FEATURES/ COMPONENTS: BUDGETS** (Figure 52) window will open. You need to fill in the following fields:

➔ **Name:** name of the function.

➔ **Weight:** this corresponds to the order in which you wish to display the component in the process menu.

➔ Go to **Global settings**

◆ **Total budget:** select the figure from the drop-down menu.

◆ **Vote threshold percent**: select the percentage from the drop-down menu.

◆ **Comments enabled**: tick to enable comments to be made.

◆ **Announcement**: enter whether you wish to display a notice.

➜ **Default step settings**: for each stage, tick the appropriate options:

◆ **Comments blocked:** tick if there is no need for being able to make comments.

◆ **Votes enabled**: Votes for projects may be collected.

◆ **Show votes**: This shows the number of times that a project has been selected.

◆ **Announcement**: enter whether you wish to show a notice at some stage.

To finish, click on **Add feature/ Components.**

Figure 52 - Add feature/ Component: budgets

Once the budget function has been configured, the projects that will be put to the vote need to be created. Go to the participatory process's submenu, to **Features/ Components** and select **Budgedname** (the name that is given to the function), and click **New**.

The **NEW RESULT** window will open (Figure 53). The fields that appear in the file are as follows:

➜ **Title**

➜ **Description**

➜ **Budget**

➜ **Scope:** select the scope from the drop-down menu.

➜ **Category**: where necessary, select the category from the drop-down menu.

➜ **Related proposals**: select proposals relating to the project.

Figure 53 - New budget result

To edit projects for voting on, go to the participatory process's submenu, then go to **Features/ Components** and select **Budgetname** (the name that the function has been given). The **PROJECTS** window (Figure 54) will open. Click on the corresponding icons: **Preview** to see how they will look, **Edit, Collections** and

Attachments for adding documents or **Delete.** This window also lets you see the votes that the various projects have received. (Number of votes) and the total number of votes (**Finished votes** and **Pending votes,** that is, that a participant has started voting but has still not cast their vote).
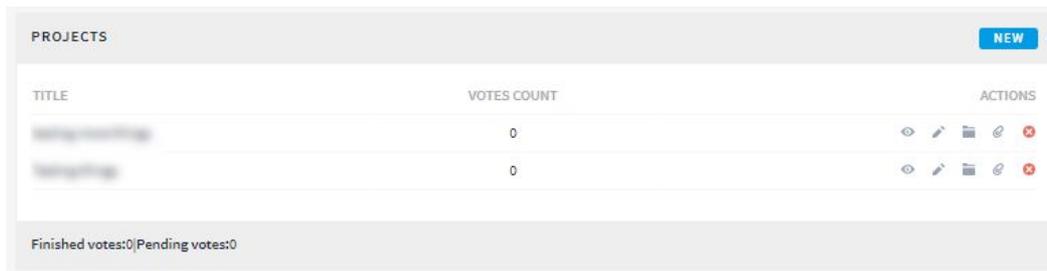
Figure 54 - List of projects for voting on

Besides creating the projects, you also have to specify who can vote for them. Go to the **PROCESSES** submenu and click first on **Features/ Components** and then on the **Permissions** icon from **Budgets.** (Figure 55).
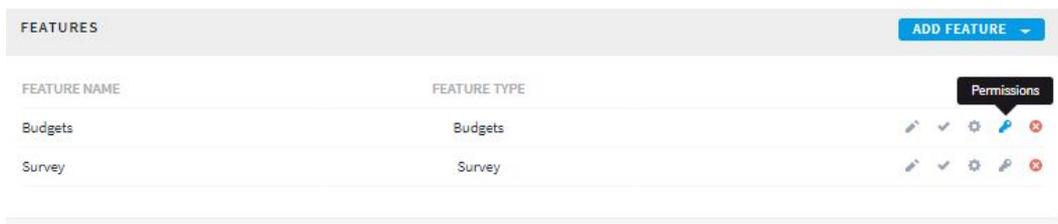
Figure 55 - Budget permissions icon

The **Editing Permissions** window opens, in which the criterion must be selected in the drop-down so people can vote. These criteria vary depending on the instance and must be defined when the Decide is installed, although they can be modified later by a programmer. In the example (Figure 56), the criteria are: **Everyone**, **Identify documents (Multy-Step)**, **Code by postal letter (Multi-Step)** and **Example authorization (Direct).**

Figure 56 - Budget edit permissions

Surveys

This component allows you to design and carry out surveys, as well as to visualize the results of the surveys. It is useful to be able to know the opinion of the citizens.

To configure the component (feature) of the surveys, in the **PROCESS** sub-menu, click on **Features / Components**, then click **Add feature/ component** in the upper right corner of the window and select **Survey**. Opens the window **ADD FEATURE/ COMPONENT: SURVEY** (Figure 57).

The following items must be filled:

➔ **Name:** name of the survey.
➔ **Weight:** the order in which you wish to display the components in the participatory process's menu.
➔ **Global settings:** It is used to display a **Announcement** (highlighted message) on all pages of the process. Write the content of the message when appropriate.
➔ **Step settings:** Mark **Allow answers** when the survey opens. If you want to show an outstanding message in any of the phases by reference to the survey, write the message content to **Announcement** in the corresponding phase.

Finally click on **Add feature/ component**.

Figure 57 - Add features/ Components: Survey

To edit the survey, click **Survey** in the **Featuress/ Components** submenu of the participatory process. A window opens in which the general information about the survey should be put (Figure 58):

→ **Title:** Title of the survey

➜ **Description:** Description of the survey

➜ **Terms of service:** information on how the survey data will be processed, etc.

From this window, the results of the survey can also be exported in formats CSV, JSON or EXCEL, by clicking **EXPORT** on the upper right.

Then click **Add question**. For each of the questions, the following fields must be filled:

➜ **Statement:** Statement of the question.

➜ **Mandatory:** Click if the question has to be answered obligatorily.

➜ **Type:** select the type of response from the menu (short answer, long answer, single option, multiple option). In the case of a multiple choice, you will have to write the **Statements** of the different **ANSWER OPTIONS** by clicking successively **Add Answer Option**.

Click again **Add question** to configure the rest of the questions. The same procedure is repeated for each of the questions in the survey. When you finish click **Save**.
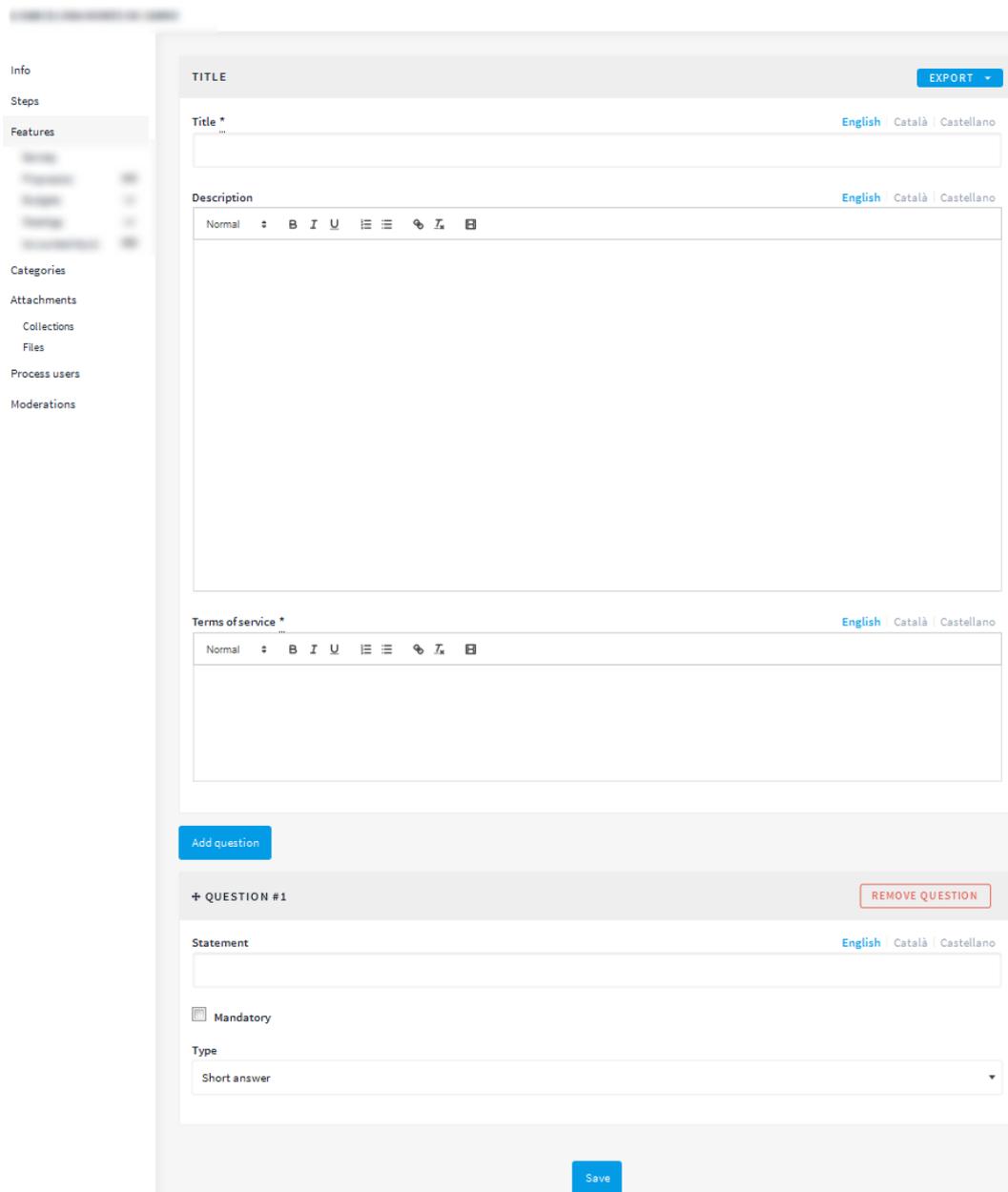
Figure 58 - Create survey

Accountability

The **Accountability** component allows people who visit the platform to view the level of execution (global, by categories and / or subcategories), of the results of a participatory process. That is to say, the proposals that have ended up being the result of the decision making in the Decidim, either directly (through the result of the application of a voting system) or mediated by meetings, assemblies, technical or political team, and its degree of execution.

The results can be converted into projects or decomposed into subprojects, which can be described in more detail and for which the execution status can be defined, ranging from 0% execution to 100%. The results, projects and states can be updated through a CVS and manually through the administration interface.

To configure the **Accountability** component, go to the **PROCESSES** submenu and click first on **Features/ Components** then click on **Add feature/ Component** in the upper right part of the window and select **Accountability**. The **ADD FEATURE/ COMPONENT: ACCOUNTABILITY** window will open (Figure 59).

The following fields have to be filled in:

➔ **Name**

➔ **Weight:** the order in which you wish to display the components in the participatory process's menu.

➔ **Global settings:**

◆ Mark Comments enabled if they should be able to comment on the results

◆ And fill in the fields: **Intro, Name for "Categories", Name for "Subcategories", Name for "Results", Name for "Projects".**

◆ Click **Display progress** to show the execution status

➔ **Default step settings:** For each of the stages (1. Information, 2. Make your proposal, 3. Projects, 4. Budget, 5. Results, 6. Evaluation of the process) tick **Comments blocked** if appropriate (no comments can be made at this stage).

To finish, click on **Add feature/ Component**.

Figure 59 - Add features/ Components: accountability

To create a new result, click on **NEW RESULT** from the **ACCOUNTABILITY** window (to access it, click on **Accountability** from the participatory process's **Features/ Components** submenu). The **NEW RESULT** window will open (Figure 60).

Figure 60 - New result

Featuring the following fields:

➔ **Title**

➔ **Description**

➔ **Scope:** if necessary, select from the drop-down menu

➔ **Category:** if necessary, select from the drop-down menu

➔ **Start date:** select the date from the menu

➔ **End date:** select the date from the menu

➔ **Status:** select the status from the drop-down menu

➔ **Progress:** Define the degree of progression

➔ **Add proposals**: Go to the drop-down menu and select the proposals it includes (use the **ctrl** function to select more than one proposal).

➔ **Included projects:** select from the drop-down menu

To manage the **Accountability**, click on *Acountabilityname* from the **Processes** submenu. The **ACCOUNTABILITY** window will open displaying a list of the results and possible **ACTIONS** (**Preview**, **New result, Project evolution, Edit** and **Delete**) (Figure 61).

Figure 61 - Results

Debates

The feature/ component **Debate** allows you to open questions or discussions about specific topics defined by the administrators or the participants.

To configure the **Debate** Feature/ Component, in the submenu of **PARTICIPATORY PROCESSES**, click on **features/ components.** Then click on **Add feature/ component** in the upper right corner of the window and select **Debates**. The window opens **ADD FEATURE/ COMPLEMENT: DEBATES** (Figure 62).
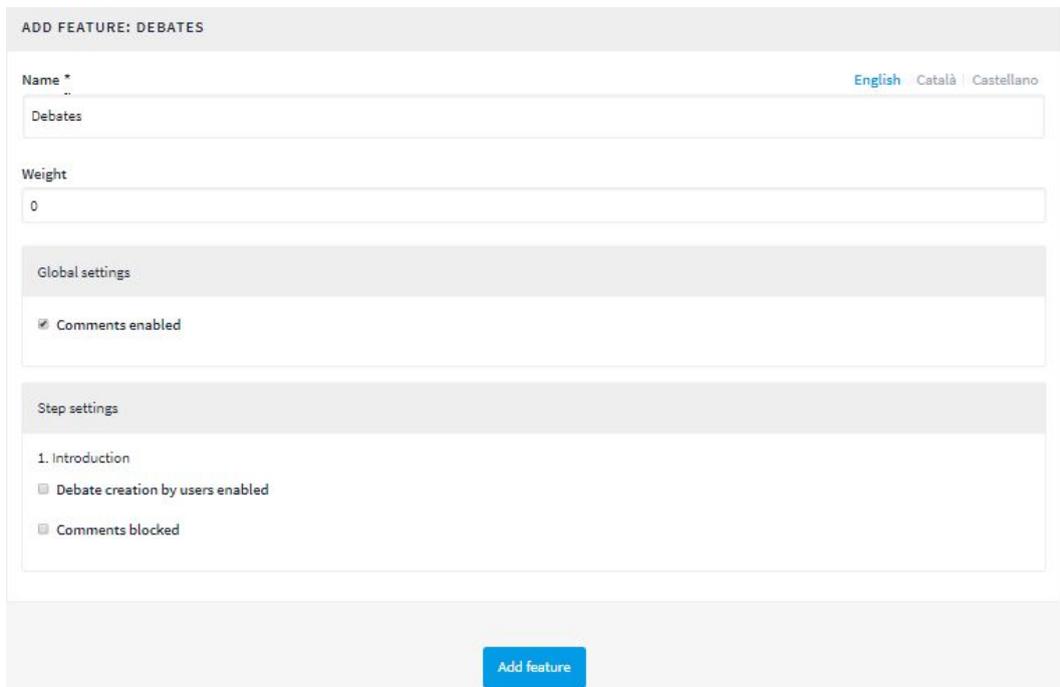
Figure 62 - Add feature/ Components: debates

The following items must be filled:

➔ **Name:** Name of the debate
➔ **Weight:** the order in which the **Debate** component will be displayed in the participatory process menu.
➔ **Global settings:** Mark **Comments enabled** so they can comment.
➔ **Step settings:** for each step, click **Debate creation by users enabled** (when users want to open debates), and only if necessary, click **Comments blocked**.

Finally, click on **Add feature/ component.**

To open a new debate, click on **NEW DEBATE** in the **DEBATES** window (to access it, click on **Debates** in the submenu **features/components** of the participatory process). The **NEW DEBATE** window opens (Figure 63).

The items to fill in to configure a new debate are:

➔ **Title:** title of the debate
➔ **Description:** description of the debate
➔ **Instructions to participate:** steps to follow in order to participate in the debate
➔ **Starts at:** date in which the debate begins
➔ **Ends at:** the date on which the debate ends
➔ **Decidim category:** select the category if applicable

Finally, click on **Create a debate.**

Figure 63 - New debate

Once created, to view the list of debates, click **Debates** in the menu of **features/components** of the corresponding **Participatory Process**. In this way, we access the **Debates** window (Figure 64).

Figure 64 - Debates

For each of the debates, the title, the start date, the end date and the actions that can be made with each debate (**Edit** and **Delete**) are shown.

Sortitions

The **Sortitions** function allows you to randomly select a certain number of proposals from a series, for example, to determine at random which people will form part of a group (such as a committee) from a larger group, where each person would be a nomination.

To configure the **Sortitions** function in the **PROCESSES** submenu, click first on **Features/ Components** and then click on **Add feature** in the upper right part of the window and select **Sortitions**. The **ADD FEATURE/ COMPONENTS: SORTITIONS** (Figure 65).

Figure 65 - Add feature/ Components: sortitions

The following fields have to be filled in:

➔ **Name:** Name of the sortition

➜ **Weight:** the order in which the **Sortition** component will be displayed in the participatory process's menu.

➜ **Gobal settings:** Tick **Comments enabled** if there is a need for comments to be made**.**

To finish, click on **Add feature/ Component**.

To carry out a draw, click on **NEW** from the **SORTITIONS** window (to access it click on **Sortitions** from the participatory process's **Features/ Components** submenu). The **NEW SORTITION** window (Figure 66) will open.

The fields that have to be filled in for configuring a new draw are as follows:

➜ **Títle**

➜ **Proposals set:** select the series of proposals (in this case, the people who may form part of the group/ committee) that are included in the draw.

➜ **Categories of the set of proposals in which you want to apply the draw:** select, where necessary, the categories of the series of proposals that you wish the draw to apply to.

➜ **Number of proposals to be selected**: select the number of proposals (from the drop-down menu) which you want to be selected by means of a random draw of the previously selected series of proposals.

➜ **Witnesses:** Enter the names of the people who will be witnesses.

➜ **Sortition information:** fill in if further information is deemed relevant.

➜ **Result of die roll:** To further guarantee the randomness of the result, you will need to throw a 6-sided die (or look for another random way of generating a number from 1 to 6) before witnesses and enter the resulting number in the drop-down menu.

Figure 66 - New Sortition

3.5.8 Process groups

A group of processes proves useful for subdividing large participatory processes into subprocesses according to scope (territorial areas of organisation, such as districts and neighbourhoods, or sectoral scopes). An example are the Municipal Action Plans (PAMs) where Action Plans can be grouped by District.

To configure participatory process groups, click on **PROCESS GROUP** from the menu on the left of the **DASHBOARD.**
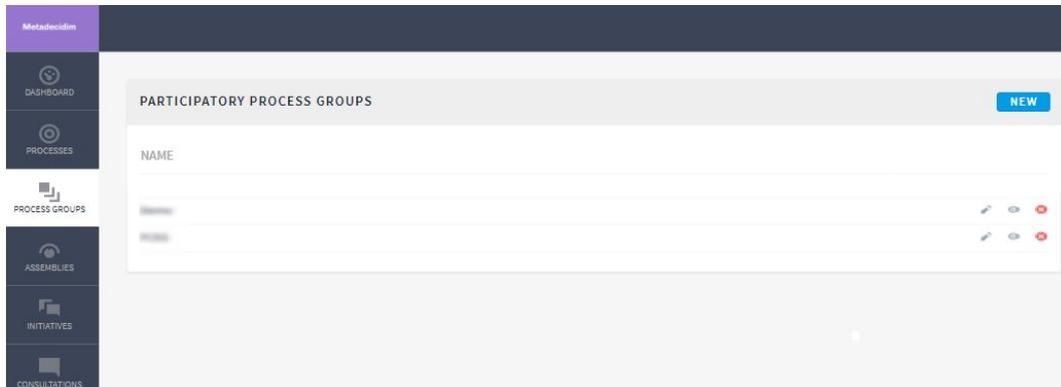
Figure 67 - Process groups

Then click on **New** in the **PARTICIPATORY PROCESS GROUPS** window (Figure 67), which will display the list of **Process groups** when they have been created.

The **NEW PROCESS GROUP** (Figure 68) window will open, where the following has to be entered:

➔ **Name**

➔ **Description**

➔ **Related processes**: select the processes that have to be grouped (use the **ctrl** function).

➔ **Imatge:** (upload the image that is meant to be associated with the process group).

To finish, click on **Create.**

Figure 68 - New process group

3.6   Assemblies

To configure bodies such as municipal Councils or city Assemblies, click on **ASSEMBLIES** in the menu on the left of the **DASHBOARD** (Figure 69).
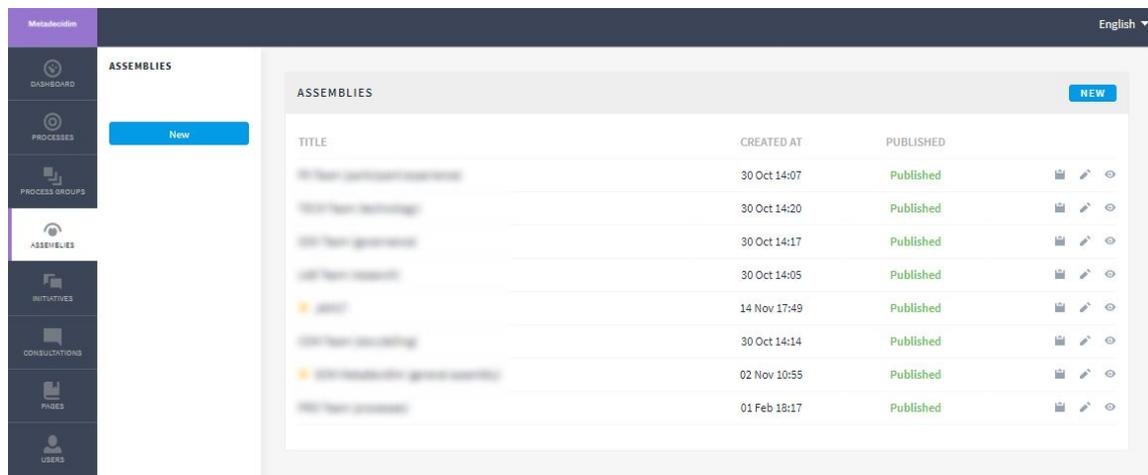
Figure 69 - Assemblies

Then click on **NEW**. The **NEW ASSEMBLY** window will open (Figure 70), where general information on the assembly has to be entered. See 2.5.1 *(Information on participatory processes)* for filling in the information required there.

Go to the list of assemblies, clicking on the icons corresponding to each of the assemblies; you can duplicate and configure the assembly and preview how it will look once it is published.

Once the bodies/assemblies have been created, functions can be added such as meetings, documents, static pages etc. To do this you will have to follow the same steps as the ones for adding functions to participatory processes (See 2.5 *Processes*).

Go to **ASSEMBLEES** where you will find the list of assemblies (Figure 69), and click on the name of the body you want configure. The **GENERAL INFORMATION** window will open, displaying the body's submenu on the left, from where you can carry out the configuration.

The options available through the assemblies' submenu are **Info**, **Features/ Components**, **Categories**, **Attachments**, **Assembly users** and **Moderations** (Figure 71). To configure the various options, see 2.5 *(Processes)*.

Figure 70 - New assembly

Figure 71 - Assemblies' submenu

As with processes, several types of role can be configured for users. To register an assembly's users, click on **Assembly users** from the assemblies' submenu and click on **NEW**.
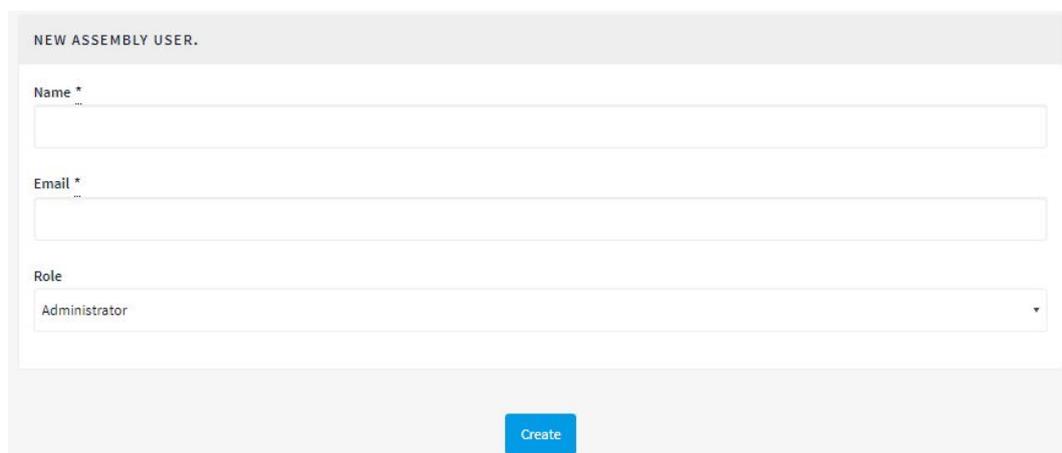
Figure 72 - New assembly user

You need to fill in the following fields: **Name**, **Email** and **Role** (select from the **Administrator**, **Collaborator** or **Moderator** drop-down menu). Immediately afterwards click on **Create** (Figure 72)

3.7   Initiatives

Initiatives (in the case of public, citizen and communal authorities) are distinguished from the other participation spaces because they are participatory tools or mechanisms promoted by citizens. In other words, the initiatives are mechanisms for semi-direct democracy through which citizens can promote a certain action of common interest to the authority, by collecting a specific number of signatures.

In this case, what the authority has to do is enable the promotion of these initiatives and offer the necessary technical support and advice to the people concerned. The role of the platform's administrator, then, is somewhat different from that of the other participation spaces. In the first place, you will have to configure the various forms of initiatives provided for under the regulations (municipal rules), specifying the number of signatures required for processing the various types of citizen initiatives. An initiative for incorporating one or several items into the Municipal Council's agenda evidently requires fewer signatures than another initiative for promoting a citizen consultation.

To configure the initiative type, click on **INITIATIVES** on the menu to the left of the **DASHBOARD**, then click on **Initiative types** from the Initiative submenu and then on **NEW** (Figure 73).
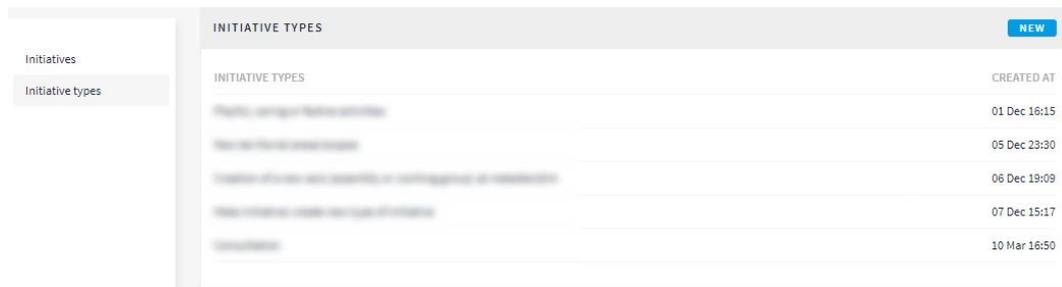
Figure 73 - Initiative types

The **New initiative type** window will open (Figure 74), where you need to enter the **Title**, **Description** of the initiative and upload a **Banner image**. To finish, click on **Create**.

Figure 74 - New initiative type

A window will immediately open with the information just created on the initiative type, where the number of signatures required has to be specified according to possible scopes (city, neighbourhood/ district). (See Figure 75 at the very bottom)

Figure 75 - Initiative type's window

Second, the administrator will have to monitor the initiatives created by users and check whether all the information presented is correct. Go to the initiative submenu (Figure 73) and click first on **Initiatives** and then on the corresponding initiative. On the left of the submenu for that initiative (Figure 76), you can: configure the **Committee members**, the **Meetings** and create a **Page** and **Attachments**. The procedure for configuring these functions is identical to the one used in other participation spaces, such as participatory processes and assemblies.

Figure 76 - Submenu of a specific initiative

To carry out these monitoring actions click on **Information** in the initiative's submenu. The following buttons will appear at the very bottom: **Update**, **Send to technical validation**, **Publish** (**Unpublish** where it has already been published), **Discard initiative**, **Export supports** (in *.csv*, visible when the initiative has been published).

For example, an initiative can be rejected where it limits or restricts fundamental rights and freedoms and, in the case of local authorities, where it does not refer to matters under municipal jurisdiction.

3.8   Newsletters

Newsletters are emails with information on the platform (new developments, processes that are sent to everyone who has been registered with the platform and who has ticked the box for receiving relevant information on the processes there are on the platform.

To create a newsletter, click on **NEWSLETTERS** from the menu on the left of the **DASHBOARD.** Click immediately afterwards on **New** in the submenu on the left. The **NEW NEWSLETTER** window will open (Figure 77), where the **Subject** (Title of the newsletter) and **Body** (text) fields have to be filled in, both in Catalan and in Spanish. To finish, click on **Save** on the lower part of the window.
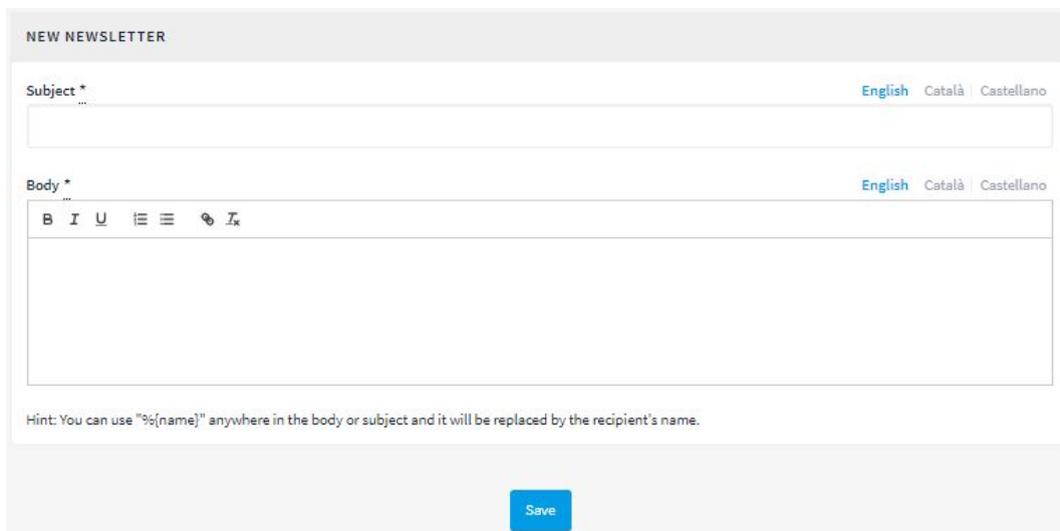
Figure 77 - New newsletter

You can use "%{name}" in any part of the body or subject and this will be replaced by the addressee's name.

ANNEXES

Annexe I - Information pages

Here we offer you three informative pages that you can use as a template or re-use replacing the text highlighted in yellow with the correct text. You can find the same documents in spanish or catalan in their respective Administering Decidim document.

Information/FAQs

FAQS (EN)

If you'd like to take part in participatory processes and have your say, register! Note that to use some of the functions of certain processes (such as voting and prioritising) you will have to verify that you are registered with Name of the Municipality/ Organization, by following a very simple step.

What is Name of the Municipality/ Organization?

A platform for building a more participatory Name of the Municipality/ Organization, with a shared vision and for delving deeper into local participatory democracy.

Platformname is a participatory platform based on open code. Citizens can see how it is built and can reuse or improve it. Check out the code here on GitHub.

How can I participate in Platformname?

Get informed

- Consult the active participatory processes.

- Browse through the proposals made by other citizens

- Access the face-to-face meetings' data and documents and the discussions and debates held there.

- Search contents of interest to you, by district, subject matter and tags.

Take part

- Make new proposals.

- Offer arguments in favour or against, or your general thoughts.

- Share the proposals on social media.

Follow the existing proposals

- Follow the existing proposals: those started on the platform and those generated by face-to-face meetings.

- After the face-to-face meetings have taken place, you can follow the progress of the discussions and debates as well as the contributions generated.

- Tick a proposal of interest to you and follow its entire progress, from the comments made by others to the final documents.

What are...?

Participatory processes

==Platformname== activities that involve citizens and which are carried out in several stages: information, diagnosis, contributions, decisions, results and evaluation of the proposals.

Assemblies

Permanent participatory channels and bodies.

Face-to-face meetings:

Meetings and work sessions for contributing to active participatory processes.

Surveys

Questionnaire for providing information and sharing your opinion.

Discussions and debates

Digital spaces for getting informed and deciding on the proposals in the processes that have this function enabled.

Proposals

Contributions you can make as a user. In some cases you will be able to receive votes from other users. Some of them will have a decision-taking function and others a merely consultative function. Each process will have its own characteristic rules.

Comments

Contributions you can make as a user in response to a proposal or discussion and debate.

My residency verification doesn't work.

Check the following possibilities:

- Have you entered your national ID number or document without spaces between the digits, including the final letter?

- Are you sure you are a registered resident in the municipality of <mark>Name of the Municipality/ Organization</mark>? (The municipality is geographically smaller than the Barcelona Metropolitan Area and the Province of Barcelona)

- There may be a problem with your data in the residency register. Consult your nearest CITIZEN HELP AND INFORMATION OFFICE and confirm that your registration information is correct.

If all the above steps do not solve the problem, email us at <mark>Email</mark> or come to the face-to-face discussions and debates for each process.

I am not a registered resident in <mark>Name of the Municipality/ Organization</mark>; why can't I vote for the proposals?

Only registered residents in <mark>Name of the Municipality/ Organization</mark> are allowed to vote in processes where proposals can be voted on. When it comes to questions that affect decisions to be taken that are specific to the city, it is the city's residents who need to take part in such decision-taking.

It is true that there are people not registered <mark>Name of the Municipality/ Organization</mark> residents who may still be affected by these decisions, but the Register is the broadest available census that we have in <mark>Name of the Municipality/ Organization</mark>: it allows us to reach the maximum number of people while also guaranteeing that the participatory process is secure. On the other hand, not all the processes launched from the platform require their participants to be registered residents in the city.

I am not a registered <mark>Name of the Municipality/ Organization</mark> resident. Can I participate?

Yes, you can take part even when you are not a registered resident. You can take part in several enabled processes, in face-to-face discussions and debates, and you can launch a proposal, without having to be a registered resident. It is only in some processes that voting for proposals is limited to registered residents, just as only registered residents can vote at municipal elections.

Why do I have to verify my account?

You need a user account to use the platform. You can do more or fewer things depending on the degree of verification:

- If you register with the website through an email address without providing any further information (so the verification process is not carried out), you will be able to comment on and debate proposals.

- If after registering, you have carried out the basic verification, i.e. you have verified your residence through the platform (more info at "How do I create

and verify my account?"), you can vote for proposals in processes that are feasible (in certain processes).

- You can always take part in person and at any of the face-to-face meetings there are for each participatory process. Contributions that are made face to face will be collected, published and accessible to the platform.

Do I need a mobile phone or access to internet to take part?

No. You can carry out any action relating to the proposals - whether for creating, supporting, voting for or getting informed about them - face to face at any of the discussions and debates that are held. You can also create a completely verified user account if you wish to use the platform.

How do I create and verify my account?

The first step is to create an account. Create the account and fill in the information you are asked for. You are required to tick the box stating that you accept our user terms and conditions. On creating a new account, an email will be sent to the address you have specified, and you will have to click on the link it contains (the "Confirm my account" link) to complete the creation of the account.

Once your basic account has been created and you have logged in using your email and password, the system will give you the option of carrying out a basic verification. To do this, click on the "My account" link on the top right and then click on the "Verify my account" button.

Some processes, where necessary, will also require you to enter your residency data, to verify you are a registered resident in Name of the Municipality/ Organization (it is important to enter the document number along with the letter and your date of birth, and tick the box stating you accept access to the Municipal Register). If your data is correct, your account will allow you to support the proposals.

I've forgotten my password and my account doesn't work. What can I do?

You can request a new password, which will be sent to your email address. If the above solution does not work, you can email us at Email, and we will solve the problem associated with your account. Processes that include face-to-face meetings are open to you to attend and take part in, without the need for you to register with the platform.

How can I change my email address, my user name, my password, unsubscribe or activate/deactivate the notifications that are sent to email address?

Click on the "Enter" link, enter your email address and password, and click on the "Enter" button. Once you have done so, click on the "My account" link, where you will find all the options, allowing you to change your email address or user name, unsubscribe, or activate/deactivate notifications. Once you have made the appropriate changes, make sure you click on the "Save changes" button.

I am unable to create my account correctly.

Review the section "My residency verification doesn't work", in case the problem lies in this step; generally speaking, this is the most frequent problem. If this does not solve your problem, review the section "How to create and verify my account", to ensure that your are following the steps correctly. If the problem persists, email us at Email, and you will be given assistance.

Terms and conditions of use

Terms and conditions of use (EN)

Legal aspects and conditions of use for the Platformname participatory platform at Name of the Municipality/ Organization City Council.
(the ones that the legal services recommend you. You can use the [Decidim.Barcelona terms and conditions of use](#) as a model).

How the platform works

Accessibility (EN)

This refers to the webpage's design and contents, which have to be accessible (without any visual or technological obstacles and for the largest number of users possible), and to standard regulations (WAI, Web Accessibility Initiative).

Decidim.Barcelona example [Accessibility](#).