



**eServices for MBUAs  
for GSO**

27-29 May 2013  
Riyadh, Saudi Arabia

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Training materials

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## eServices for User Administrators

Date: May 27-28-29, 2013  
Location: Riyadh, Saudi Arabia  
Trainer: François Miéville

[helpdesk@iso.org](mailto:helpdesk@iso.org) 

### Tell us about yourself...

*Your name*

*Your role*

*Your country*

*Your experience*

*Your expectations  
for the training*



e3

## Objectives of the course

### Develop the skills required by User Administrators to understand:

- ISO's organizational and procedural principles
- The role of User Administrators in the management of data in the **Global Directory**
- The different **ISO eServices applications** and how they fit together
- The **ISO national solutions**
- The use of **WebEx** to organize and participate in online meetings
- The use of **ISOSTD** to access and download ISO deliverables
- The use of **ISODOC** to access and download ISO policy documents and other general documents

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## Course Outline

### Day 1

1. Introduction
  - 1.1 ISO Members
  - 1.2 Standards Development
  - 1.3 ISO Online & ISODOC
  - 1.4 ISO Systems Overview
  - 1.5 Single Sign-One (SSO)
2. Global Directory & Event Notifications
  - 2.1 Global Directory

### Day 2

2. Global Directory & Event Notifications
  - 2.1 Global Directory – Continue
  - 2.2 Event Notifications
3. ISO eServices Applications
  - 3.1 ISO eCommittees
  - 3.2 ISO Meeting Management
  - 3.3 ISO Project Portal
  - 3.4 ISO eBalloting

### Day 2 - Continue

4. Access to International Standards
  - 4.1 ISOSTD & ISO Online

### Day 3

5. National Solutions
  - 5.1 NTCLite: National eCommittees Lite
  - 5.2 ISolutions
6. My role as User Administrator - Summary
7. Online Meetings
  - 7.1 WebEx
8. ISO Connect
9. Support, Helpdesk and Conclusion

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ISO Applications	User Administrator roles
<b>Global Directory</b>	<ul style="list-style-type: none"> <li>➤ Responsible to Manage experts and their roles for my NSB</li> <li>➤ Responsible to create/manage National Committees</li> </ul>
<b>Event Notifications</b>	<ul style="list-style-type: none"> <li>➤ Monitor changes made to users administered by my NSB</li> <li>➤ Take action if you see any mistakes</li> </ul>
<b>eCommittees (ISOTC)</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>Meeting Management</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>Project Portal</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>eBalloting</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>ISOSTD / ISODOC</b>	None
<b>ISOlutions (national solution)</b>	<ul style="list-style-type: none"> <li>➤ Manage national experts and their roles, national organizations, national committees, ISO/CEN mappings in GD</li> <li>➤ Manage documents of other regional (i.e. COPANT) and international organizations (i.e. IEC) manually in eCommittees</li> <li>➤ Support for national committee users (National Helpdesk)</li> </ul>

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<b>1. Introduction</b>
<b>1.1 ISO Members</b>

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## ISO structure

- ISO is not just an organization based in Geneva
- ISO is a network of national standards bodies
- ISO is a global system made up of:



Member bodies



Experts working in the Technical Committees (TC)



ISO Central Secretariat (ISO CS)

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## Member Bodies: Membership of ISO

Three Categories of membership:

- Member bodies (110)
- Correspondent members (43)
- Subscriber members (10)

*Only one member per country  
Most broadly representative of standardization in the country*



*ISO member = bridge between ISO and standardization in the country*

**Note: Statistics as of February 2012**  
[http://www.iso.org/iso/iso-in-figures\\_2011.pdf](http://www.iso.org/iso/iso-in-figures_2011.pdf)

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## Member Bodies: Membership of ISO

	Member bodies	Correspondent members	Subscriber members
Definition	National body most representative of standardization in its country.	Organization in a country which does not yet have a fully-developed national standards activity	Organization in a country with very small economies Pay reduced membership fees
Who are they?	Developing countries or developed countries	Developing countries	Developing countries
Permission	<ul style="list-style-type: none"> <li>• Participation in any policy or TCs</li> <li>• Voting rights</li> <li>• Can adopt ISO standards</li> <li>• Can sell &amp; distribute ISO Publications</li> </ul>	<ul style="list-style-type: none"> <li>• <b>No voting rights</b></li> <li>• Can adopt ISO standards</li> <li>• Can sell ISO Publications</li> <li>• Kept fully informed</li> </ul>	<ul style="list-style-type: none"> <li>• Allows them to maintain contact with ISO activity but have no participating rights</li> </ul>



## ISO Technical Committees

3'335 technical bodies comprising:

- 224 **Technical Committees** (TC) structured into
  - 513 **Sub-Committees** (SC) and
    - 2'516 **Working Groups** (WG) where:
  
- 100'000 qualified **Committee Members** (experts) from:
  - ❖ Industry
  - ❖ Research institutes
  - ❖ Government authorities
  - ❖ Consumers

*Come together as equal partners to develop a consistent multi-sector collection of globally relevant International Standards*

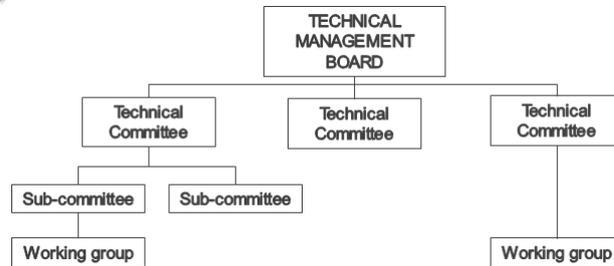
**Note: Statistics as of February 2012**  
[http://www.iso.org/iso/iso-in-figures\\_2011.pdf](http://www.iso.org/iso/iso-in-figures_2011.pdf)

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## ISO Technical Committee structure



### Technical Management Board (TMB):

- Report to the Council
- 14 members of the ISO member bodies
- Elected for 3-years terms
- TMB sets the rules for quality & efficiency

### TMB Main Functions:

- Establishment of TCs and overall management of the technical work in ISO
- Appointment of Chairmen
- Approval of titles, scopes
- Coordination & monitoring, planning
- Matters of principle (appeals)

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## Member Bodies involvement in TCs

### P-Member (Participating members):

- Member bodies that want to play an **active role** in the work of a TC/ SC
- Have the **obligation to vote** in all official ballots to the TC work
- Have the duty to identify experts who may contribute to TC activity
- Provide feedback route to their national organizations

### O-member (Observer members):

- Member bodies who wish to follow
- No obligation to actively participate in the work of a TC or SC
- Can only follow the development of a standard

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## Member Bodies involvement in TCs

	Member bodies	Correspondent members	Subscriber members
P-Member	YES	NO	NO
O-Member	YES	YES	NO

 *Correspondent Members and Member bodies do not have the same rights as O-member:*

1. A correspondent member **have no voting/commenting rights**.
2. A correspondent member **can not attend a WG meeting** even as an observer.

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## Technical Committee example

### ISO/TC 207: Environmental management

**Scope:** Standardization in the field of environmental management systems & tools in support of sustainable development

**Members:** 74 P-members and 28 O-members

**Sub-committees:**

SC1: Systems

SC2: Auditing

SC3: Labelling

SC4: Evaluation

SC5 LCA

SC7 GHG

+ support & advisory groups

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## ISO Central Secretariat

### The ISO Central Secretariat is managed by:

- the Secretary-General (CEO), assisted by
- the Deputy Secretary-General

### And includes:

Approx. 150 staff working in the various departments

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## ISO Central Secretariat - Responsibilities

### The Central Secretariat is responsible for:

- Providing the secretariat for:
  - the General Assembly
  - Council
  - Policy Development Committee (PDCs) and,
  - Technical Management Board (TMB)
- Services to ISO Members
- Support services to TCs and SCs
- Marketing ISO publications
- Communication and information about ISO;
- Programme for developing countries.(example: ICTDEV mission)

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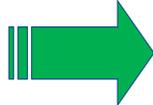
## Summary



### National Member Bodies

#### 3 memberships:

- Member body
- Correspondent members
- Subscriber members



### Experts working in the Technical Committees (TC)

- Member body may be **P-member** or **O-member** to TCs/SCs
- Correspondent members can only be **O-member** to TC/SCs
- Subscriber members **cannot participate** to TCs/SCs



### ISO Central Secretariat (ISO CS)

- Support services to TC and SC but not directly involved in development work
- Provide service to ISO Members (National Member bodies)

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## Want to know more about ISO in figures?

**About ISO**

**What is ISO?**

ISO (International Organization for Standardization) is the world's largest developer of voluntary International Standards. International Standards give state-of-the-art specifications for products, services and good practice, helping to make industry more efficient and effective. Developed through global consensus, they help to break down barriers to international trade.

**What we do**

ISO develops International Standards. We were founded in 1947, and more than 19 000 International Standards covering almost all aspects of industry, from food safety to computers, and agriculture to healthcare, ISO is in our lives.

**Contact ISO**

International Organization for Standardization  
ISO Central Secretariat  
1, ch. de la Voie-Croisée  
CP 56  
CH-1211 Geneva 20  
Switzerland

E-mail: [central@iso.org](mailto:central@iso.org)  
Tel: +41 22 749 01 11  
Fax: +41 22 733 34 30

**ISO in figures**

A four-page introduction to the ISO standardization system, the ISO system's output, ISO's partners and ISO's path forward.

[Download pdf](#)

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# 1. Introduction

## 1.2 Standards Development

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### Standards Development

- ISO standards are developed through precise **processes**, including defined **stages**
- ISO also produces other **deliverables**
  - ✓ Technical Specifications (TS)
  - ✓ Technical Reports (TR)
  - ✓ International Workshop Agreements (IWA)
  - ✓ Guides
  - Etc...
- The **procedures** for developing ISO standards are defined in the ISO/IEC Directives
  - ✓ 3 core documents describing basic procedural and drafting rules to be followed by ISO committees

[http://www.iso.org/iso/standards\\_development/processes\\_and\\_procedures.htm](http://www.iso.org/iso/standards_development/processes_and_procedures.htm)

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## Development stages of International Standards

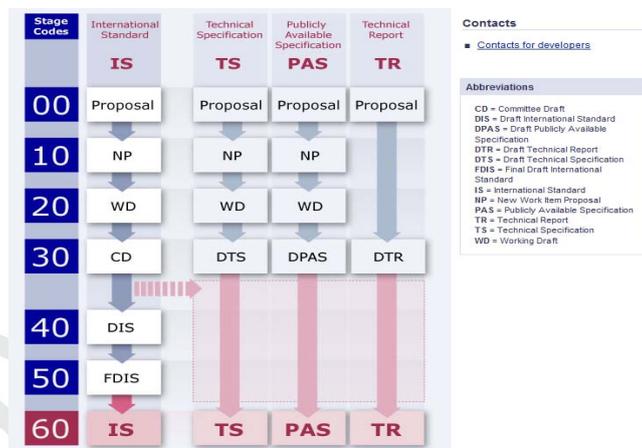
Stage	Name	Level	Product name (document)	Acronym	Time line
00.00	Preliminary	TC	Preliminary Work Item	<b>PWI</b>	
10.00	Proposal	TC	New work item proposal	<b>NP</b>	
20.00	Preparatory	WG	Working Draft	<b>WD</b>	
30.00	Committee	TC	Committee Draft	<b>CD</b>	
40.00	Enquiry	ISO/CS + TC	Draft International Standards	<b>DIS</b>	
50.00	Approval	ISO/CS	Final Draft International Standards	<b>FDIS</b>	
60.60	<b>Publication</b>	<b>ISO/CS</b>	<b>International Standards</b>	<b>IS</b>	

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## Development stages and ISO deliverables

[www.iso.org/tipsandtools](http://www.iso.org/tipsandtools)



Add this address to your favourites/bookmarks

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## Questions? Further reading...



- **Fast forward - National Standards Bodies in Developing Countries**



- **My ISO job – Guidance for delegates and experts**



- **Standards work on the Web: the ISO solutions**

On ISO-Online: Free publications about ISO and its activities :

[http://www.iso.org/iso/free\\_pubs#ABOUTISO](http://www.iso.org/iso/free_pubs#ABOUTISO)

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## 1. Introduction

### 1.3 ISO Online and ISODOC

**[www.iso.org](http://www.iso.org)**

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## ISO Online homepage

Home Fr | Ru Members Store

Standards About us Standards Development News Search ISO

Popular standards

- ISO 31000 Risk management
- ISO 8000 Quality management
- ISO 26000 Social responsibility
- ISO 14000 Environmental management
- ISO 31000 Country codes
- ISO 55001 Energy management

Connect with ISO:

What do you think of our new website?

We recently redesigned our website and would really appreciate your feedback. Please fill in this [quick survey](#) to let us know what you think.

News

Earlier access to ISO standards with the Online Browsing Platform

ISO has just released a new, improved version of its Online Browsing Platform, giving users the ability to browse and download ISO standards and related information, such as country codes, in a range of over 100 languages, graphical abstracts, tables, and terms and definitions.

The Online Browsing Platform is a unique tool to ISO in supporting users in their endeavours for getting International Standards. Based on advanced technology (HTML5), the new platform provides complete search and download capabilities with a single "click" and better way to use ISO standards information.

Read the full story

ISO Focus+

Our recently released new edition of the International Standard ISO 9001:2015, the first, sets high standards for quality management systems. The update to the standard is fully reflective of the needs of the global economy, the changing nature of business, and the requirements of government agencies.

Health and Wellness

The ISO 9001:2015 edition of ISO 9001 includes the latest thinking on the health and wellness sector. It provides a framework for the industry and addresses the ISO standard's approach to quality and safety in the health sector.

ISO Standards in Action

ISO International Standards provide practical tools for tackling many of today's global challenges. In

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## ISO Online: Store

Home Fr | Ru Store

Standards About us Standards Development News Search ISO

Standards catalogue Publications and e-products

ISO Store

Economic benefits of standards

A book of case studies on the economic benefits of standards

How to buy

Standards catalogue

Search the standards catalogue

eg: ISO 9001 Go

Publications & e-products

Search publications

eg: quality Go

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## ISO Online: Store – Standards catalogue

The screenshot shows the ISO Standards catalogue page. A red box highlights the 'Standards catalogue' link in the top navigation bar, with a red arrow pointing to it labeled 'Browse'. Another red box highlights the 'Standards catalogue' link in the breadcrumb trail, with a red arrow pointing to it labeled '1'. A red arrow labeled 'Search' points to the search input field on the right, which contains the text 'Search the standards catalogue eg ISO 9001'. Below the search field is a 'Go' button. At the bottom of the page, there is a table with two columns: 'ICS' and 'Field'. The table lists various ICS numbers and their corresponding fields.

ICS	Field
01	Generalities, Terminology, Standardization, Documentation
03	Services, Company organization, management and quality, Administration, Transport, Sociology
07	Mathematics, Natural Sciences
11	Health care technology
13	Environment, Health protection, Safety

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## ISO Online: Store – Publications and e-products

The screenshot shows the ISO Publications and e-products page. A red box highlights the 'Publications and e-products' link in the top navigation bar, with a red arrow pointing to it labeled 'Browse'. Another red box highlights the 'Publications and e-products' link in the breadcrumb trail, with a red arrow pointing to it labeled '1'. A red arrow labeled 'Search' points to the search input field on the right, which contains the text 'Search publications eg quality'. Below the search field is a 'Go' button. The main content area features a grid of publication categories. At the bottom of the page, there are sections for 'Contact customer services', 'Shopping at ISO', and 'Shopping FAQs'.

Category	Sub-category
Handbooks	ISO Packs
JTC1 Collections	Checklists
Databases	Magazines
About ISO	Governance
Standards Development	Management standards
Conformity assessment	Consumers
Environment	Metrology
Information technologies	
All publications	Free publications

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# ISO Online: Standards

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# ISO Online: About us

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## ISO Online: About us – Members & Participation

**ISO members**

We are a network of national standards bodies. These national standards bodies represent ISO in their country.

There are three member categories. Each enjoys a different level of access and participation in ISO technical and policy meetings. Full members self-manage their national standards body. Countries with limited resources or without a fully developed standards system can still observe and keep up to date with international standards. Read more about how ISO supports [developing countries](#) in international standards.

- Full members (or member bodies) **influence** ISO standards development and participate in ISO technical and policy meetings. Full members self-manage their national standards body.
- Correspondent members **observe** the development of ISO standards and attend ISO technical and policy meetings as observers. Correspondent members can self-manage their national standards body.
- Subscriber members **keep up to date** on ISO's work but cannot participate in ISO technical and policy meetings.

All members (164)	Member bodies (111)	Correspondent members (53)
<b>Country</b>	<b>Acronym</b>	<b>Code</b>
Algeria	ANSA	Com
Albania	APS	Com
Algeria	APS	Com
Angola	ANORQ	Com
Antigua and Barbuda	ABS	Sub
Argentina	IRAM	Member body
Armenia	ANSI	Member body
<b>Australia</b>	<b>SA</b>	<b>Member body</b>
Austria	AS	Member body

**Participation in TCs**

**Australia (SA)**

To support this objective, a Memorandum of Understanding (MOU) was signed between Standards Australia and the Commonwealth Government. Standards Australia is also Australia's member of the International Electrotechnical Commission (IEC), the International Organization of Standardization (ISO), the International Organization of Standardization for Standardization (IOS), and the International Organization of Standardization for Standardization (IOS).

Standards Australia is a company limited by guarantee incorporated in the development and application of standards.

Participation in the technical work
ISO Participation: 438
ISO Participation: 3

## ISO Online: Standards Development

**How does ISO develop standards?**

An ISO standard is developed by a panel of experts, within a **technical committee**. Once the need for a standard has been established, these experts meet to discuss and negotiate a draft standard. As soon as a draft has been developed it is shared with ISO's members who are asked to comment and vote on it. If a consensus is reached the draft becomes an ISO standard, if not it goes back to the technical committee for further edits. [Click on the diagram below for further details.](#)

**4** Draft shared with all national members, who are asked to comment

If consensus is reached

**5** Final draft sent to all ISO members

Final draft is approved

**Are you involved in ISO's technical work?**

Tools and publications to help guide the development of standards can be found in the [Resource area](#).

Every working day of the year, an average of eight technical meetings take place somewhere in the world. Increasingly, these are being held using electronic means, speeding up the development of standards and cutting travel costs.

**Who develops ISO standards?**

More information on who develops ISO standards can be found in this section.

**Standard Development Process**

A step-by-step guide to the standard development process can be found in this section.

**Governance of technical work**

More information about the governance of technical work can be found in this section.

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# ISO Online: Standards Development

The screenshot shows the ISO Standards Development page. A red arrow points to the 'Standards Development' menu item. Below it, the 'Technical committees' section is visible, with a red box around the 'Technical committees' link. A table lists ISO technical committees, with 'TC 2 Fasteners' highlighted in red. A blue arrow points from this table to a detailed view of 'TC 2 Fasteners'. This detailed view includes a 'Standards catalogue' section with a red box around the 'Total number of published ISO standards related to the TC and its work (number includes updates)' value of 627. A red label 'Information about TC' points to the detailed view, and another red label 'List of standards of the TC' points to the standards catalogue.

**Technical committees**

The list of ISO technical committees provides basic information for each technical committee. The TCs are listed in numerical order, following the order in which they were established. For example, TC 1 focusing on screw threads was created in 1947 and TC 209 on railroads was created in 2012.

From this list you can access basic information, including the contact details of the secretariats and working groups, by clicking on the name of the committee or that column. Links to the TC working areas can be found in the third column. ISO/TC work number of standards published by each committee is also visible, clicking on this will list the list of standards published. Standards under development can be viewed by click number in the Work programme column.

**STANDBY** refers to TCs that have no work item in progress or foreseen but that will review the ISO International Standards for which they are responsible.

**JTCs** is the Joint ISO/IEC TC that was created in 1987.

**Project Committees** are established when there is a need for an international standard specific topic that does not fall into the scope of an existing TC. Project Committees are once the standard has been published.

**List of ISO technical committees**

Committee	Title	ISO/TC
JTC 1	Information technology	JTC
JTC 2	Joint Project Committee - Energy efficiency and renewable energy systems - Consumer interest	JTC
TC 1	Screw threads	TC
<b>TC 2</b>	<b>Fasteners</b>	<b>TC</b>
TC 4	Rolling bearings	TC
TC 5	Ferrous metal pipes and metallic fittings	TC

**TC 2 Fasteners**

**Information about TC**

**List of standards of the TC**

Standards catalogue

Total number of published ISO standards related to the TC and its work (number includes updates): 627

Number of published ISO standards under the direct responsibility of TC 2 (number includes updates): 62

Participating countries: 21

Observing countries: 26

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# ISO Online: Standards Development resource area

The screenshot shows the ISO Standards Development resource area page. A red arrow points to the 'Standards Development' menu item. Below it, the 'Resource area' link is highlighted with a red box. The page title is 'Resources for ISO technical work'. The page contains several sections: 'Procedures for developing standards', 'Contact and Support', 'Support for drafting standards', 'Useful publications', and 'Training'. A red arrow points to the 'IT tools for standards development' section at the bottom right, with a red label 'Scroll down for IT Tools'.

**Resources for ISO technical work**

This page contains information and tools designed to support the work of ISO's technical committee members. The majority of this information is not password protected. However, some links may take you to pages where your log in is required.

**Procedures for developing standards**

The rules for the development and drafting of documents intended to become International Standards, Technical Specifications or Publicly Available Specifications are described in the ISO/IEC Directives Part 1 and 2 and the ISO Supplement.

There are also a number of additional rules that must be taken into consideration when developing International Standards or other documents.

Access [the ISO/IEC Directives, the ISO supplement and additional rules](#)

**Contact and Support**

For questions about technical work, please contact us at:

- [directives@iso.org](mailto:directives@iso.org) for questions about ISO/IEC Directives
- [helpdesk@iso.org](mailto:helpdesk@iso.org) for help with electronic applications
- [drawings@iso.org](mailto:drawings@iso.org) for help with graphic files
- [templates@iso.org](mailto:templates@iso.org) for help with templates
- [projects@iso.org](mailto:projects@iso.org) for help with the submission
- [votes@iso.org](mailto:votes@iso.org) for help with ballot administration

**Support for committee secretaries, chairs and balloters**

**Useful publications**

**My ISO job**

Guidance for delegates and experts offering a quick reference to the ISO system and its processes.

Download pdf

More publications for standard developers

**IT tools for standards development**

Scroll down for IT Tools

## ISO Online: News

ISO Standards in Action ISO Missions Events Media Kit

### News from ISO

#### Attention customers! No more bill shocks thanks to new ISO standard

by Liz Gasiorowski-Denis on 8 August 2012

Anyone who has received an inaccurate or late bill for their gas, electric, water, or telephone services can understand why billing is one of the main sources of customer complaints against utilities. A new ISO standard provides solutions by giving recommendations for billing practices that actually "make sense" for customers.

ISO 14452:2012, *Network services billing – Requirements*, serves as a framework for utility services to ensure their customers receive clearly comprehensible, accurate, timely and complete bills. What's more, it should result in fewer complaints for utility services and, in so doing, reduce operating costs, improve debt recovery, and increase customer satisfaction and loyalty.

[Read the full entry](#)

[More news](#)

#### ISO events

World Standards Day 14 October 2012

*Less waste, better results - Standards increase efficiency*

[More ISO Events](#)

[ISO Standards in Action](#)

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## ISO Members' Portal and ISODOC

### What is it?

- ISO Members' Portal (webpage) and ISODOC (Livelink repository) are where ISO Members can find information relating to GA, Council, TMB, CPSG, ISO Circular Letters, CASCO, COPOLCO, DEVCO, ITAG
- Access is restricted, and only given to relevant staff from ISO Member Bodies
- ISO Members' portal provides an alternative access point to the information hosted on ISODOC

### My role as User Administrator in this application?

- None

### How to Access?

- User accounts are managed by ISO/CS (mbportal@iso.org)
- Same login and permissions used for both ISODOC and Member's Portal
- ISODOC can be accessed from the Member's Portal or at [www.iso.org/isodoc](http://www.iso.org/isodoc)
- ISO Members' Portal is accessible from ISO Online [www.iso.org](http://www.iso.org)



## ISO Members' Portal

Home Fr | Ru Members Store

Standards About us Standards Development News Search ISO

**Popular standards**

- ISO 31000 Risk management
- ISO 9000 Quality management
- ISO 26000 Social responsibility
- ISO 14000 Environmental management
- ISO 3166 Country codes
- ISO 50001 Energy management

**Connect with ISO:**

Contact us

in

We're ISO, the International Organization for Standardization. We develop and publish International Standards.

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## ISO Online - Summary

### ➤ ISO online contains information about:

- ISO Products: Under development, published or withdrawn standards
- Electronic products
- Work in progress in TCs and SCs
- Guides for ISO electronic tools
- Press releases

*... and much more ...*

### ➤ Available in English, French and Russian

### ➤ Mobile version available

**[www.iso.org](http://www.iso.org)**

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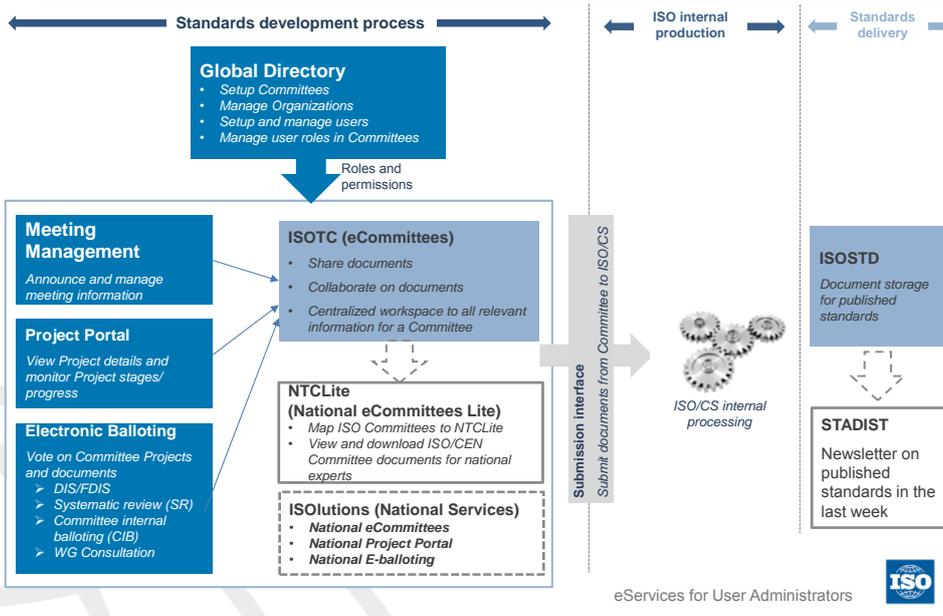
# 1. Introduction

## 1.4 ISO Systems Overview

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### The standards development chain & electronic balloting



# 1. Introduction

## 1.5 Single Sign-On

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### Access to eServices applications: ISO Online

<http://www.iso.org/eServices>



Standards Development > Resource area > Electronic Applications

#### IT tools for standards development

We have a number of IT Tools that help support the standards development process.

#### ISO Electronic Applications

ISO's Electronic Applications can all be accessed under our central login portal <https://login.iso.org>

Electronic Applications include:

- Event Notification
- Electronic Balloting
- Global Directory
- ISOTC Server (eCommittees)
- Meeting management
- Project Portal
- Submission Interface
- National Mirror Committees

[Access Electronic Applications](#)

#### Other useful tools

A number of other tools that help support the standards development process can be found here:

[Comment collation tool](#) - The comment collation tool enables the automatic collation of comments

#### Help and Support

##### User guides

[User guides](#) are available for all ISO electronic applications. We suggest you bookmark this page in order to keep up to date on the content.

##### Need training?

ISO offers training to help with using its electronic applications. Read more about [training services](#), including a list of courses and how to participate.

##### Need help with the electronic applications?

Contact the ISO International Helpdesk at [helpdesk@iso.org](mailto:helpdesk@iso.org) for help with ISO's electronic applications.

#### Keep in touch with ISO Connect

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## Access to eServices applications: Direct link

<https://login.iso.org>

Welcome to ISO Electronic Applications portal page.

This page lists web-based applications that can be securely accessed with a single login.  
You can find more information about ISO applications on the official ISO website.

<a href="#">Event Notifications</a>	Manage notification reports on changes in the ISO system.
<a href="#">Electronic Balloting</a>	Support of consensus feedback processes in ISO standardization.
<a href="#">Global Directory</a>	Central repository for managing committees, organizations, users and their roles for international, regional, and national work.
<a href="#">ISOTC Server</a>	Document management systems for the collaborative development of standards.
<a href="#">Meeting Management</a>	Support ISO committees meetings organization.
<a href="#">Project Portal</a>	Aggregated project status information for ISO committees and member bodies.
<a href="#">Submission Interface</a>	Support of file and project data submissions to the ISO Central Secretariat.
<a href="#">National Mirror Committees</a>	Dissemination of ISO documents to National Mirror Committees.

**Home**

- List of applications
- Help
- Contact helpdesk

**Actions**

- Sign into applications



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## SSO - Login

Welcome to ISO Electronic Applications portal page.

This page lists web-based applications that can be securely accessed with a single login.  
You can find more information about ISO applications on the official ISO website.

<a href="#">Event Notifications</a>	Manage notification reports on changes in the ISO system.
<a href="#">Electronic Balloting</a>	Support of consensus feedback processes in ISO standardization.
<a href="#">Global Directory</a>	Central repository for managing committees, organizations, users and their roles for international, regional, and national work.
<a href="#">ISOTC Server</a>	Document management systems for the collaborative development of standards.
<a href="#">Meeting Management</a>	Support ISO committees meetings organization.
<a href="#">Project Portal</a>	Aggregated project member bodies.
<a href="#">Submission Interface</a>	Support of file and Secretariat.
<a href="#">National Mirror Committees</a>	Dissemination of ISO

**Home**

- List of applications
- Help
- Contact helpdesk

**Actions**

- Sign into applications

**Sign in to Identity Manager**

Username  
Enter your username here

Password  
●●●●●●●●

I have read the declaration, and I accept the conditions set forth therein

Sign In

**Help**

- I have lost my password...
- I don't have an account yet...
- Contact helpdesk

**Don't forget**

Declaration related to the use of information, including participants' personal information

Show



## SSO – Change password

**1**

Home

- List of applications
- Help
- Contact helpdesk
- Actions**
  - Sign into applications

Sign in to Identity Manager

Username  
Enter your username here

Password  
.....

I have read the declaration, and I accept the conditions set forth therein

Sign In

Declaration related to the use of information, including participants' personal information  
Show

**2**

Home

- List of applications
- Help
- Contact helpdesk
- Actions**
  - My settings
- Administration
  - Dashboard
  - Notification messages
  - Statistics

Authentication settings

**Change my password**

Change the password you use to connect to ISO electronic applications.

**3**

Home

- List of applications
- Help
- Contact helpdesk
- Actions**
  - My settings
- Administration
  - Dashboard
  - Notification messages
  - Statistics

eServices

ISO

## SSO – Logout

ISO Electronic Applications

List of protected applications

Welcome to ISO Electronic Applications portal page.  
This page lists web-based applications that can be securely accessed with a single login. You can find more information about ISO applications on the official [ISO website](#).

Event Notifications	Manage notification reports on changes in the ISO system.
Electronic Balloting	Support of consensus feedback processes in ISO standardization.
Global Directory	User and role assignment and administration system for granting access to ISO electronic applications.
ISOTC Server	Document management systems for the collaborative

Home

- List of applications
- Contact helpdesk
- Help
- Actions**
  - My settings

**1**

**2**

Do you really want to log out from authenticated ISO Electronic Applications?

If you accept, you won't be able to access any applications until you log back-in. If you arrive at this page because you are attempting to log into another ISO application, please visit the [list of protected applications](#).

Yes, log me out of ISO Electronic Applications

No, take me back to the previous page

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ISO

## Access - Training Environment

<https://training.iso.org>

Welcome to ISO Electronic Applications portal page.  
This page lists web-based applications that can be securely accessed with a single login.  
You can find more information about ISO applications on the official [ISO website](#).

TRAINING ENVIRONMENT	
<a href="#">Electronic Balloting</a>	Support of consensus feedback processes in ISO standardization.
<a href="#">Global Directory</a>	User and role assignment and administration system for granting access to ISO electronic applications.
<a href="#">ISOTC Server</a>	Document management systems for the collaborative development of standards.
<a href="#">Submission Interface</a>	Support of file and project data submissions to the ISO Central Secretariat.
<a href="#">National Mirror Committees Server</a>	Dissemination of ISO documents to National Mirror Committees.

**Home**

- [List of applications](#)
- [Contact helpdesk](#)
- [Help](#)

**Actions**

- [Sign into applications](#)

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## Demo and Exercises

### Demo:

- Show the different environments and their differences
- Change password in the training environment



### Exercises:

**Exercise 1:** Compare the differences between the “Live” SSO and the training SSO

**Exercise 2:** Change your password in the training environment from *password1234* to one of your choice (requirements : 8 characters minimum including 2 digits)

**Exercise 3:** Find the online user guides for ISO applications

Training environment : <https://training.iso.org>

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<b>Timeline</b>	
<p><b>Day 1</b></p> <ul style="list-style-type: none"> <li>1. Introduction               <ul style="list-style-type: none"> <li>1.1 ISO Members</li> <li>1.2 Standards Development</li> <li>1.3 ISO Online &amp; ISODOC</li> <li>1.4 ISO Systems Overview</li> <li>1.5 Single Sign-One (SSO)</li> </ul> </li> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory</li> </ul> </li> </ul>	<p><b>Day 2 - Continue</b></p> <ul style="list-style-type: none"> <li>4. Access to International Standards               <ul style="list-style-type: none"> <li>4.1 ISOSTD &amp; ISO Online</li> </ul> </li> </ul>
<p><b>Day 2</b></p> <ul style="list-style-type: none"> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory – Continue</li> <li>2.2 Event Notifications</li> </ul> </li> <li>3. ISO eServices Applications               <ul style="list-style-type: none"> <li>3.1 ISO eCommittees</li> <li>3.2 ISO Meeting Management</li> <li>3.3 ISO Project Portal</li> <li>3.4 ISO eBalloting</li> </ul> </li> </ul>	<p><b>Day 3</b></p> <ul style="list-style-type: none"> <li>5. National Solutions               <ul style="list-style-type: none"> <li>5.1 NTCLite: National eCommittees <i>Lite</i></li> <li>5.2 ISOLutions</li> </ul> </li> <li>6. My role as User Administrator - Summary</li> <li>7. Online Meetings               <ul style="list-style-type: none"> <li>7.1 WebEx</li> </ul> </li> <li>8. ISO Connect</li> <li>9. Support, Helpdesk and Conclusion</li> </ul>

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## 2. ISO Global Directory & Event Notifications

### 2.1 Global Directory (GD)

**<https://login.iso.org>**

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## Global Directory – Content Overview

---

What is the Global Directory ?

My role as User Administrator in the Global Directory

Data Ownership & Permission

Global Directory: How to Navigate & Search

Hands-On Exercises: How to Navigate & Search

Global Directory: How to Create & Modify Data

Hands-On Exercises: How to Create & Modify Data

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## What is the Global Directory ?

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The Global Directory (GD) is an administrative application

- Manages **experts**
- Manages **Committees, expert roles and permissions** to those International and National committees
- Manages **Member Bodies** and **organizations** involved in Standards Development
- Manages **National Committees**

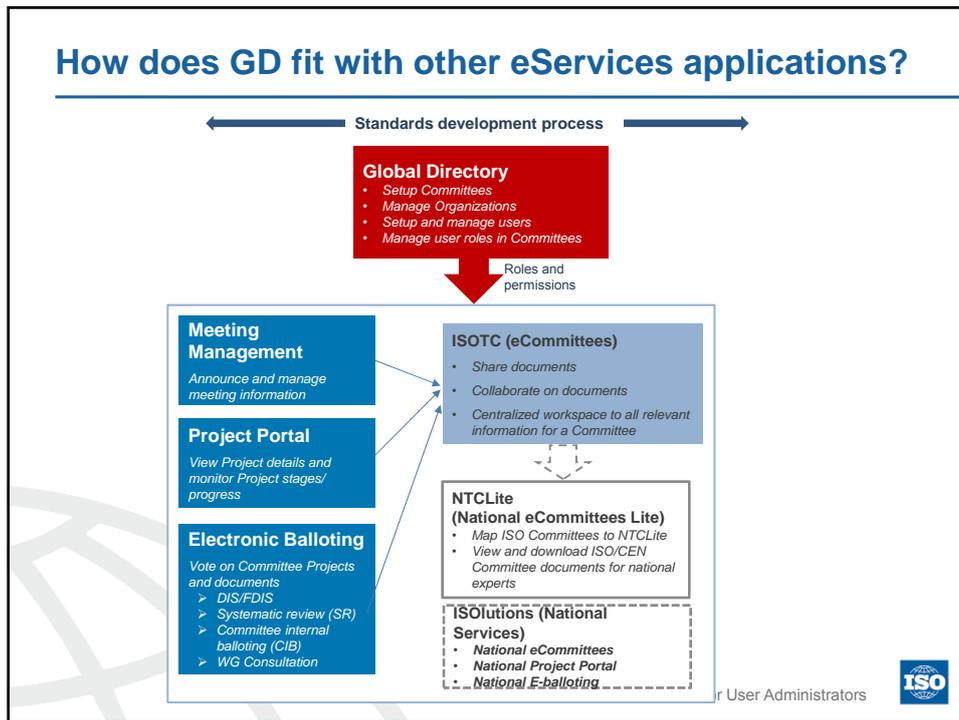


Only User Administrators can access to the GD



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## How does GD fit with other eServices applications?



## Global Directory 3 – Home page

Global Directory
Help

Welcome to Global Directory !

**PERSONS**

- Search
- CREATE NEW
- Person

**COMMITTEES**

- Search
- CREATE NEW
- Committee

**ORGANIZATIONS**

- Search
- CREATE NEW
- Organization

**REPORTS**

- List of reports
- QUICK LINKS
- Experts' roles in committees
- Users administrated by an organization
- User administrators of GD

**EXPORT**

- All person roles
- All committee roles
- All organization roles

**HELP**

- What's new ?
- Quick start guide
- User guide and FAQ
- Contact Helpdesk

**News & Announcements**

Click here to see all the news and announcements.

**Release notes**

For more information related to Global Directory releases or if you have great

Features	Description
Persons section	Access the <b>Persons Advanced search</b> or <b>Create a new Person</b>
Committees section	Access the <b>Committees Advanced search</b> or <b>Create a new Committee</b>
Organizations section	Access the <b>Organizations Advanced search</b> or <b>Create a new Organization</b>
Reports / Exports	Run the different reports and exports available for data extract
Help	Access the different help files and release notes
News & Announcements / Release notes	This section highlights the latest news & announcements on the application.

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## My role as User Administrator in the GD

- Create and manage:
  - Experts and their roles for your member body
  - National organizations
  - National Committees (NMC)
- You are responsible of your entities (Persons, organizations and committees), to update their details and manage their status.  
But you can also:
  - View experts that you are not administrating
  - Assign roles to experts from that you are not administering



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## Global Directory Timeline

1. What is the Global Directory ?
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6. Global Directory: How to Create & Modify Data
7. Hands-On Exercises: How to Create & Modify Data

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## Data Ownership & Permission

---

### What can I view?

- ✓ Full profile of experts administrated by my NSB
- ✓ Public\* profile of experts NOT administrated by my NSB  
*Note: \* public profile = personal information is hidden (phone numbers, postal address, person's preferences)*
- ✓ ISO Committees, CEN Committees (if member)
- ✓ National Committees - administrated by my NSB only
- ✓ International and European Organizations
- ✓ National Organizations - administrated by my NSB only

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## Data Ownership & Permission

---

### What can I create?

- ✓ Expert(s) for my NSB
- ✓ National organizations
- ✓ National Committees
  
- ✗ ISO or CEN committee (TC, SC or WG)
- ✗ International organizations
- ✗ Experts/organizations/National Committees that are not administrated by my NSB

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## Data Ownership & Permission

### What can I update?

- ✓ Experts who are Administrated by my NSB
- ✓ National Organizations that are Administrated by my NSB
- ✓ Assign/remove non-official roles to experts
- ✓ Transfer roles appointed by your NSB from one expert to another
- ✗ Assign/remove official roles to experts (managed by ISO CS)
- ✗ Add/remove an expert to/from a closed group (e.g PDC)
- ✗ Information on my NSB (although it appears as administrated by my NSB)
- ✗ Data of experts and organizations that are not administrated by my NSB
- ✗ Participation of my NSB to TCs (P-member, O-member or none)

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## Administrated by vs. Appointed by

- **Administrated by:** Only one organization can manage the details and lifecycle of an entry (e.g. name, email, address). By default, it corresponds to the organization that has registered the entry in GD.

Home	Search	Aldo Aldo Mr x				
COMMITTEE ROLES	ORGANIZATION ROLES	PROJECT ROLES	NATIONAL ROLES	ADMINISTRATED BY	STATUS	
5 ISO >	-	-	-	AENOR >	Active	

- **Appointed by:** Indicates the organization that has nominated the expert or organization to a role. A person can be appointed to a role in a committee by any organization.

SECRETARY	Appointed by
Phillip A. Mr. >	ANSI >
CONVENOR	Appointed by
Isabel Ing. >	ISO/TC 35 >

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## What is a closed group?

- Committees (PDC or WG) flagged as closed group
- This group can only be updated by ISO CS

PREFERENCES

Closed group

Mirrorable

Twinnable

Participation



If you try to add an expert to a closed group, the following error message will be generated on your screen:

Validation error

▲ NSB MBUAs cannot add or manage any roles in closed groups. Closed group can only be managed by ISO Admin

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## Data Ownership & Permission – Roles management

Roles maintained by User Administrators	Roles maintained by ISO CS
<ul style="list-style-type: none"> <li>• Secretary support team (TC and SC levels)  when your NSB has the secretariat</li> <li>• Committee Member</li> <li>• Document Monitor</li> <li>• Employee of organization</li> <li>• All ballot roles</li> <li>• All National roles</li> <li>• Translator</li> <li>• Technical Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Secretary + twinned Secretary</li> <li>• Convenor/secretary support team (WG level)</li> <li>• Chairman + twinned Chairperson</li> <li>• Convenor + twinned convenor</li> <li>• Project Leader</li> <li>• Project Submitter</li> <li>• Liaison Representative</li> <li>• NSB Participation (P and O-members)</li> </ul>



**Exception:** When a committee (TC, SC or WG) is flagged as a closed group, only ISO CS can update it.

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## Role definitions and associated permission settings

To view the full list of roles available in the Global Directory as well as their definitions and associated permission please refer to:

### GD3 – Guide for User Administrators

- Annex 1: Roles, their definitions and associated permission Page 52 of the Global Directory User Guide

[www.iso.org/e-guides](http://www.iso.org/e-guides)

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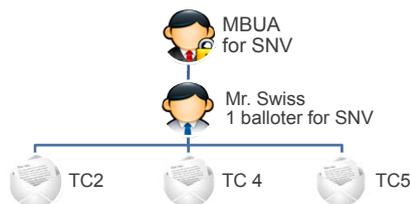


## Difference between Centralized and Decentralized roles

### Centralized roles

*This option is available for the following roles:*

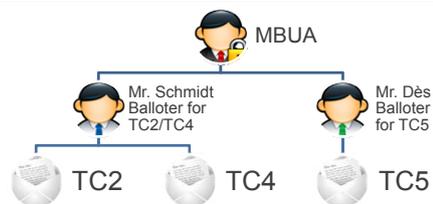
- Document Monitor
- Voter (CIB, DIS, FDIS, SR)
- Ballot Monitor



Mr. Swiss is registered as a centralized voter for SNV. It means that he is registered as a voter for all TCs where SNV is a member (P or O-member), i.e TC 2, TC 4 and TC 5 in this case.

### Decentralized roles

*This option is available for all roles*



Mr. Schmidt is registered as a voter for TC 2 and TC 4  
Mr. D s is registered as a voter for TC 5

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## Description of Centralized roles

The following centralized roles can be setup for experts from Member Bodies:

Role	Purpose
Voters (CIB, DIS, FDIS, SR)	Can vote on all CIB/DIS/FDIS/SR ballots
Ballot Monitor	Can view all CIB/ DIS/ FDIS/ SR ballots but have no voting rights
Document Monitor	Can view all committees document but not participate in committee's work (role that should be limited to NSB staff for document dissemination purpose)

**Note:** Centralized committee member and Observer (at WG level) have been replaced by Document Monitor.

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## Document monitor

- Document monitor is reserved to NSB Staff
  - The person must be registered as "Employee of Organization" of the NSB
- At WG level, document monitor should be limited to 2 persons per NSB (TMB resolution 69/2009)
- This role can be centralized (TC, SC and WG levels) or decentralized
- Gives access in read-only to committee documents for national dissemination
- This role replaces the old centralized committee member role and observer role



**The role of centralized committee member and observer no longer exist**

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## Data Ownership & Permission

### What can I inactivate?



Anything that you have created!

- ✓ Experts who are administrated by my NSB
- ✓ National organization that are administrated by my NSB
- ✓ National committees (that status will be disbanded)
- ✗ Any ISO, CEN or other National committees
- ✗ Experts who are not administrated by my NSB
- ✗ Organizations that are not administrated by my NSB



A User administrator has no permission to **DELETE** data from GD. All data must be kept for historical reasons. However if an entity has been created by mistake, you can delete it within a period of 2 days.

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## Who can send you requests to update the GD?

- ✓ Secretaries, Chairmen, Convenors, etc.
- ✓ Experts
- ✓ ISO CS: [helpdesk@iso.org](mailto:helpdesk@iso.org)
- ✓ ISO CS: [tcsupport@iso.org](mailto:tcsupport@iso.org)



If you have any doubt, please do not hesitate to contact the TC Secretary or ISO CS.

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## Global Directory Timeline

1. What is the Global Directory ?
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6. Global Directory: How to Create & Modify Data
7. Hands-On Exercises: How to Create & Modify Data

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## How do I navigate in the Global Directory?

Starting point of the GD



Welcome to Global Directory !

General menus available on every screens of the application

**PERSONS**  
• Search  
• CREATE NEW  
• Person

**COMMITTEES**  
• Search  
• CREATE NEW  
• Committee

**ORGANIZATIONS**  
• Search  
• CREATE NEW  
• Organization

**REPORTS**  
• List of reports  
QUICK LINKS  
• Experts' roles in committees  
• Users administrated by an organization  
• User administrators of GD

**EXPORT**  
• All person roles  
• All committee roles  
• All organization roles

**HELP**  
• What's new ?  
• Quick start guide  
• User guide and FAQ  
• Contact Helpdesk

News & Announcements

Click here to see all the news and announcements.

Latest information on the GD

Main navigation panel

Release notes

For more information refer

send your feedback to ISO/CS

Got Feedback?

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## Use the Quick Search to:

- Find any entity across all items in the GD (world scope is always selected).
- Search for a person when you are not sure of the spelling
- Search for the person when his/her name contains special characters because you don't need to type them (like ß, Ø or ü).
- Display a selection of the most relevant hits per category (person, committee, organization).

A screenshot of a search interface with a search bar containing the text 'oste'. Below the search bar, there are three categories of results: 'Committee', 'Person', and 'Organization'. Under 'Committee', there are five entries: 'AEN/CTN 22/SC 3', 'AEN/CTN 83/SC 12', 'AEN/CTN 91/SC 1', 'AEN/CTN 162', and 'AEN/CTN 165/GT 7'. Below these is the text 'Found a total of 14 matching Committee.'. Under 'Person', there are five entries: 'MARTINEZ ORTE David Mr.', 'ORTE Jesus', 'Osted Philippa Weirup', 'Osterlund Elisabeth Ms', and 'Osterman Thomas Mr.'. Below these is the text 'Found a total of 1,848 matching Person.'. Under 'Organization', there are three entries: 'OSTEC', 'Siemens AG Osterreich', and 'Siemens'. At the bottom of the search results area, there is a note: 'Use arrow keys and Enter to select.'

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## Use the advanced search to:

- Reduce the search results to a smaller set of data (ISO, National and World) by using Filters and scope/domain of data
- Search using «Start with»
- Search using wildcard character % to substitute any other character

A screenshot of an advanced search interface. On the left, there are two sections: 'SCOPE' and 'DISPLAY'. Under 'SCOPE', there are three checkboxes: 'World' (unchecked), 'ISO' (unchecked), and 'AENOR' (checked). Under 'DISPLAY', there are two checkboxes: 'All' (checked) and 'Only Active' (unchecked). The main search area has a navigation bar with 'Home' and 'Search' (highlighted). Below the navigation bar, there are five search tabs: 'Quick Search', 'Person Search', 'Committee Search', 'Organization Search', and 'Project Search'. The 'Quick Search' tab is active. Below the tabs, there are four input fields: 'Last Name', 'First Name', 'Account email', and 'Administrated by'. There are also two dropdown menus: 'Administrated by' and 'Status'. There are two buttons: 'Search' and 'Reset'.



By default your National scope is selected

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## Search results

Each entity opens in a new tab

Home Search ISO x ISO/TC 24/SC 4 x Smith Ann Professor x

Quick Search Person Search Committee Search Organization Search Project Search

Last Name  Administrated by

First Name  Serial number

Account email  Status

Search Reset

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## View the details of an entity (person, committee, ...)

Home Search [User] x

COMMITTEE ROLES 13 ISO+ CENTRALIZED ROLES 1 ISO+ PROJECT ROLES 1 ISO+ NATIONAL ROLES - STAFF ROLES 1+ ADMINISTRATED BY NEN+ STATUS Active

**Summary banner :**  
 > the roles of the entry,  
 > the Organization administrating the entry's details and status  
 > the entry's status

**Contextual menu**  
 > browse and manage an entry's details and roles.

**Download all roles in excel for the entry, give comments and view system information on the entry .**

DETAILS  
 View details  
 Transfer roles

ISO ROLES  
 View all roles  
 Manage

NATIONAL ROLES  
 View all roles  
 Manage

STAFF ROLES  
 View all roles  
 Manage

IDENTITY  
 Last Name  
 Sal.  
 Mr  
 Title  
 Address

ACCOUNT  
 Email  
 User name  
 Password

USABILITY  
 Employee of organization  
 CT  
 Location email  
 Telephone  
 Restricted  
 Postal address  
 Restricted

PREFE  
 Restricted

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## Search/view roles of an expert

**DETAILS**

- View details
- Edit details
- Transfer roles

**ISO ROLES**

- View all roles
- Manage

**NATIONAL ROLES**

- View all roles
- Manage

**STAFF ROLES**

- View all roles
- Manage

**STATUS**

- Manage

**ACCOUNT**

- Reset password
- Force password

- **Details** = basic information of the person, transfer roles from the person to another
- **ISO Roles** = ISO committee and centralized roles of a person  
Ballot monitor, Committee Member, Document Monitor, Secretary support team, Voter, Centralized ballot monitor, Centralized document monitor, Centralized Voter, Technical Manager, Translator
- **National Roles** = roles of an expert in National committees  
National chairperson, National committee member, National observer, National Secretary, National Secretary support team
- **Staff Roles** = roles of the person in an organization  
Employee of organization, User administrator

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## Search/view roles of an organization

**DETAILS**

- View details
- Edit details

**ISO ROLES**

- View all roles

**STAFF ROLES**

- View all roles
- Manage

**LIAISONS**

- View liaisons

**STATUS**

- Manage

- **Details** = basic information of the organization
- **ISO roles** = Roles of an organization in ISO Committees and centralized ISO roles  
Secretariat, Convenorship, P-member, O-member, Centralized ballot monitor, Centralized Document Monitor, Centralized Voter, Technical Manager, Translator
- **Staff Roles** = staff roles in the organization  
Employee of organization, User administrator
- **Liaisons** = organization's liaisons in ISO committees  
A-liaison, B-liaison, C-liaison, D-liaison

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## Search/view roles of a committee

Navigation menu options:

- DETAILS**
  - View details
- STRUCTURE**
  - View structure
- ISO ROLES**
  - View all roles
  - Manage
- LIAISONS**
  - View liaisons

- **Details** = basic information of the committee
- **Structure** = full hierarchy of the committee (parent, children committees)
- **ISO roles** = all roles in the ISO committee  
Secretariat, P-member, O-member, Chairperson, Secretary, Secretary Support Team, Committee Member, Voter, Ballot Monitor, TPM, Technical Editor
- **Liaisons** = Liaisons of an organization in the committee

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## Search/view roles – Jump to

- List of roles can be quite long
- The Jump to
  - Lists all active roles (if a role is not displayed, then it means the role is not assigned)
  - Allows you to jump to the selected role section

The screenshot shows a web interface with a navigation menu on the left and a main content area. The 'Jump to' feature is highlighted with a red box, showing a list of roles: Secretary, Secretary support team, Convener/Secretary Support Team, and Committee member. The main content area displays a table of roles under the 'SECRETARY' and 'SECRETARY SUPPORT TEAM' categories.

Role	Appointed by	Additional information
<b>SECRETARY</b>		
ISO/IEC JTC 1 • Information technology	ANSI	
ISO/IEC JTC 1/SWG 6 • Management	ANSI	
ISO/IEC JTC 1/SC 37 • Biometrics	ANSI	
<b>SECRETARY SUPPORT TEAM</b>		
ISO/IEC JTC 1/SC 32 • Data management and interchange	ANSI	<a href="#">edit</a>
ISO/IEC JTC 1/SC 18 •	ANSI	

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## Reports & Exports

Currently 3 reports and 3 exports are available:

- Experts' roles in committees per organization
- Users administrated by an organization
- User administrators of GD
  
- All person roles
- All committee roles
- All organization roles

More reports will be available on due time

## Bidirectional Relationships

- A role between a committee and a person, a committee and an organization or a person and an organization can be edited by going through either one the two objects in the relationship.

## Exercises: Navigate and Search



### *In Global Directory search for...*

- Exercise 4:** Using the quick search, try to find your profile, your NSB, one of your national committee
- Exercise 5:** Using the advanced search, try to find your profile, your organization, one of your national committees
- Exercise 6:** Search a person who is not administered by your NSB (for example: Rob Steele)
- Exercise 7:** Find the User Administrators for your NSB.
- Exercise 8:** Find the employees of organization for your NSB
- Exercise 9:** Find an international organization such as WHO, INLAC etc...
- Exercise 10:** Find ISO/TC35 and click on the different links to understand the bidirectional relationship

**Training environment :** <https://training.iso.org>

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## How to create a new entity?

**STEP 1: Check if the entity already exist**

**STEP 2: Create the new expert/organization/National committee**

- Click on **Create New**

The screenshot shows three main sections: PERSONS, COMMITTEES, and ORGANIZATIONS. Each section has a 'Search' button and a 'CREATE NEW' button. Under 'PERSONS', the 'CREATE NEW' button has a sub-option for 'Person'. Under 'COMMITTEES', it has a sub-option for 'Committee'. Under 'ORGANIZATIONS', it has a sub-option for 'Organization'. Below these sections, a note says 'Enter mandatory information shown by a red asterisk (\*)'. At the bottom, there are 'Cancel' and 'Confirm creation' buttons. A yellow bell icon is next to the text: 'Don't forget, any entity you create is now administrated by your NSB.' The ISO logo and 'eServices for User Administrators' are at the bottom right.

**STEP 3: Confirm creation**

Don't forget, any entity you create is now administrated by your NSB.

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## Create a new expert

- Any person who needs an access to ISO Electronic applications must be first registered in GD
- All roles to the other applications are given through GD

If blank, by default the personal email will be recognized as your notification email

The screenshot shows a form with several sections: IDENTITY, ACCOUNT, PREFERENCE, and CONTACT. The IDENTITY section has fields for Last name (Test), First name (John), Salutation (Mr), and Initials. The ACCOUNT section has fields for Email (john@tes), Username, and Password. The PREFERENCE section has a Preferred language dropdown set to English. The CONTACT section has fields for Notification email, Telephone, Phone (business), and Postal address (Address, Zip code, Town, State, Country). A red box highlights the Notification email field with the text 'If blank, by default the personal email will be recognized as your notification email'. Another red box highlights the Postal address fields with the text 'If you start entering an Address, then Town and Country become required (vice versa)'. The ISO logo and 'eServices for User Administrators' are at the bottom right.

## Reset User's Password & Activation account

- On the profile of the person, different options under the account section can be available:

- **Reset password** (when the person has already activate his account)
- **Force password** allows you to reset the password of a user manually on the back end

ACCOUNT  
Reset password  
Force password

- **Re-send activation email** (when the person didn't activate yet this password)
- **Pending activation:** when the person has not yet activated her account (i.e. clicked on the link in the email she received and selected a password).

ACCOUNT  
Pending activation  
Re-send activation email

- **Account not in sync!** (when the account hasn't been synchronized)
- **Sync account** (when the account isn't synchronized)

ACCOUNT  
Account not in sync!  
Sync account



A password must contain 8 characters at least (2 letters at least and 2 numbers at least)

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## Create a National Organization

- ISO recommends to fill out all information fields



You cannot create two organizations with the same acronym

Cancel Confirm creation

LEGEND  
Requires  
Activated

IDENTIFY  
English acronym\*  
ACRNM  
French acronym  
English title\*  
English title  
French title

CONTACT  
Web site  
Email  
Telephone  
Phone (business) Insert new number  
Postal address  
Address  
Zip code Town State  
Country

Library address  
Address  
Zip code Town State  
Country

If you start entering an address, then town and country become required (vice versa)

## Exercises : Create a person and an organization

### In Global Directory...

**Exercise 11:** Create a new person

**Exercise 12:** Create a new national organization



**Training environment :** <https://training.iso.org>

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## Edit an entity details

The screenshot shows the ISO Global Directory interface. At the top, there is a navigation bar with 'Home', 'Search', and a user profile dropdown. Below this is a breadcrumb trail: 'COMMITTEE ROLES' > 'ORGANIZATION ROLES' > 'PROJECT ROLES' > 'NATIONAL ROLES' > 'ADMINISTRATED BY AENOR' > 'STATUS Active'. The left sidebar contains a 'DETAILS' section with options: 'View details', 'Edit details' (highlighted with a red box), and 'Transfer roles'. Below this are sections for 'ISO ROLES', 'NATIONAL ROLES', 'STAFF ROLES', and 'STATUS', each with 'View all roles' and 'Manage' options. At the bottom left is an 'ACCOUNT' section with 'Reset password' and 'Force password' options. In the bottom right, there is a 'LEGEND' box with 'Required' (marked with a red asterisk) and 'Modified' (marked with a green square). Next to it are 'Discard' and 'Save changes' buttons, with 'Save changes' highlighted by a red box.

To edit an entity, on the profile in the left menu, click on «Edit details».

- Your NSB must be the administrator of the entity (i.e. administrated by)
- Mandatory fields are indicated by \*, and modified fields by
- Once finished, do not forget to save your changes by clicking on «save changes» button.

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## Assign a new role to a person (from the person profile)

- On the contextual menu, select the role you wish to assign (1)
- Select the committee (2), click on add (3) then «Save changes» button (4)

**1<sup>st</sup> option**

On the contextual menu, click on the type of role you want to assign (e.g ISO roles) (1)

Then click on «edit» (2) next to the role you wish to update and follow the previous procedure.

**2<sup>nd</sup> option**

## Assign a new role to a person in multiple committees

- On the contextual menu, select the role you wish to assign (1) and click “Add multiple ....” (2)
- Note: the name of the button will change according to the role you select in step 1.

(1) Enter the committee reference and number

(2) Click on Search

(3) Select the committees to be added

(4) Click on Add

**You cannot add committee members at WG and TC (or TC/SC) level at the same time**

## Assign a new role to a person (from the committee profile)

- On the contextual menu, click on Manage (1) in the person roles section and select the role you wish to add (2)
- Enter the name of the person (3), click on Add button (4), then on Save changes (5)

**1st option**

**2nd option**

- On the contextual menu, click on the appropriate section (1), then click on **Person roles** (2) next to the role you wish to update and follow the previous procedure.

## Employee of organization

Once you have created an expert you may assign him/her to an organization

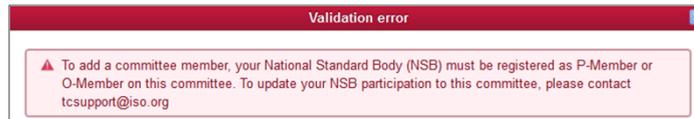
- This role is optional except for the following roles:
  - User Administrator
  - Technical Manager
  - CEO
  - Marketing Data Officer
  - Document Monitor
- Function and/or alternate title can be associated to the role

**One of the aim of Employee of organization role:**

- Collect the key points of contact of each NSB (note that CEO can only be maintained by ISOCS)
- You can only assign experts to organizations that you administer

## Assign a committee member to a TC or a TC/SC

- Decentralized role only (no longer centralized)
- To add a new committee member, your NSB must be registered as P or O-member.



**Note:** When you assign any role, the «Appointed by» field will be always your NSB.

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## Document monitor

Document monitor is reserved to NSB Staff:

- At WG level, the employee of organization is mandatory:



- At TC and SC level, you will receive a warning message:



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## Exercises : assign roles, transfer role and report

*In Global Directory...*



*For the exercises below use the organization and expert you created in exercises 11 and 12*

**Exercise 13:** Assign your expert as employee of organization of your NSB and add a function

**Exercise 14:** Assign your expert as Committee Member of ISO/TC 500

**Exercise 15:** Assign a person not administered by your organization to the role of Committee Member in ISO/TC500

**Exercise 16:** Assign the role of document monitor to one of the expert administered by your NSB

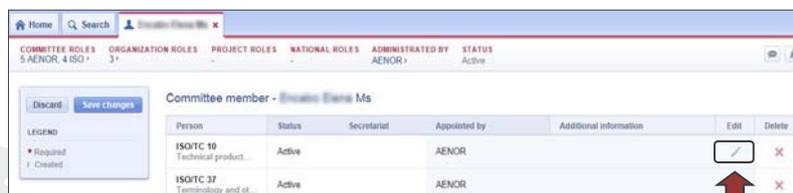
**Training environment :** <https://training.iso.org>

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## Roles metadata

- Some roles have a set of metadata associated to it
- Metadata differs from one role to another (some are mandatory and some are optional)
- To update a role's metadata, click on the Edit icon 



COMMITTEE ROLES	ORGANIZATION ROLES	PROJECT ROLES	NATIONAL ROLES	ADMINISTRATED BY	STATUS
5 AENOR, 4 ISO	3			AENOR	Active

Person	Status	Secretariat	Appointed by	Additional information	Edit	Delete
ISO/TC 10 Technical product...	Active		AENOR			
ISO/TC 37 Terminology and et...	Active		AENOR			

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## List of metadata

Metadata	Roles	Description
Notification email	Available for all roles	Assign a specific notification email on a role which will override the default notification email for all correspondence on this role.  E.g.: when a Secretary wishes to receive all notifications concerning his secretary role to a specific email address.
Comment	Available for all roles	Add a comment to a role assignment.
Ballot type*	Voter Ballot Monitor	When assigning <b>balloting roles</b> , you will be asked to indicate for which ballot (CIB, DIS, FDIS, SR).
Stakeholder category*	Committee member (at WG level only)	When assigning experts to an <b>ISO working group</b> , you will be asked to indicate the stakeholder category that most closely reflects his or her background.
Function / Alternate function title	Employee of organization	When assigning a person as " <b>employee of an organization</b> ", you can indicate his function in the organization and if needed, enter his effective title to the function.
Main point of contact	User Administrators	When registering a new <b>User administrator</b> , you can designate it as main point of contact for your NSB.

\* = mandatory metadata

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## Assign a committee member to a Working Group

- Assigning a committee member on an ISO working group (WG) requires a mandatory stakeholder category (TMB resolution 89/2011)
- This information most closely reflects the expert's background
- For those which this metadata is not registered, please update them as far as possible



## Voter and ballot monitor

- For Voter and ballot monitor role, the type of ballot is a metadata (CIB, DIS, FDIS, SR)
- Voter and ballot monitor can be centralized or decentralized
- If your NSB is not registered as P or O-member of this committee, the CIB ballot type for Voter is missing by default.
- Any NSB should assign at least one centralized voter



The role of SR voter is now independent from the role of DIS voter

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## Exercises : assign roles, transfer role and report

*In Global Directory...*



*For the exercises below use the organization and expert you created in **exercises 11 and 12***

**Exercise 17:** Assign your expert as CIB voter and add a comment to the role

**Exercise 18:** Search for ISO/TC 500/WG 1 and **assign** your expert as Committee Member

**Exercise 19:** Assign the role of centralized voter for DIS to your expert

**Exercise 20:** Add a notification email to the centralized voter for DIS role you assigned in the previous exercise.

**Training environment :** <https://training.iso.org>

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## User Administrator – Main point of contact

- User Administrator is an **Organizational role**
- When several User Administrators are registered, a main point of contact should be nominated
- Only one point of contact can be assigned per NSB
- Information can be found in the report

The dialog box is titled "Additional information" and contains the following fields and options:

- New assignment**  
User administrator - AENOR - [redacted]
- Appointed by\***: A dropdown menu with "AENOR" selected.
- Notification email for the role**: A text input field with "email..." as a placeholder.
- Main Contact\***: Radio buttons for "Yes" (selected) and "No".
- Comment**: A large text area.
- Buttons**: "Cancel" and "Add".

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## Transfer role

- Applies to the roles of committee member, Voter and all National roles
  - Doesn't apply on centralized roles
  - Only roles appointed by your organization can be transferred
- 1) From the person's profile, click on **Transfer role**
  - 2) Select the person who should receive the role
  - 3) The system will then check what transfers are possible. Only roles displayed with a green tick ✓ can be transferred
  - 4) Select the roles you wish to transfer
  - 5) Click on Save changes button
  - 6) Once done, the profile of the target person will be opened in a new tab

**Note:** Click on "Select by roles" to select only the role you want to transfer

The interface shows a table of roles with columns for Committee, Role, Role information, and Additional information. A legend on the left explains the transfer status icons: a green checkmark for "Transfer possible", a red X for "Transfer not possible", and a red X with a slash for "Role already exist". The table lists three roles, all with green checkmarks in the "Check" column. The "Action" column contains icons for "Check" and "Action". A dropdown menu at the bottom allows selecting a person to transfer the role to, with "CANO Sara" selected. A "Select by roles..." button is also present.

Committee	Role	Role information	Additional information	Check	Action
ISO/COPOLCO Committee on consumer	Committee member			✓	⊗
ISO/TC 10 Technical product docum	Committee member			✓	⊗
ISO/TC 37 Terminology and other lar	Committee member			✓	⊗



## How to inactivate/disband an entity

- All roles must be removed from the entity
- Exception: A person can still be registered as employee of organization
- Once done the summary banner is hatched:

COMMITTEE ROLES	ORGANIZATION ROLES	PROJECT ROLES	NATIONAL ROLES	ADMINISTRATED BY ISO >	STATUS Inactive
-----------------	--------------------	---------------	----------------	---------------------------	--------------------

- A comment is mandatory at each change of status to enforce the data quality and to keep a clear audit on any change of status

**Note:** Once an entity has been inactivated, it can be reactivated. For committees, it depends of the hierarchy.

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## Exercises : assign roles, transfer role and report

*In Global Directory...*



*For the exercises below use the organization and expert you created in exercises 11 and 12*

**Exercise 21:** Choose an expert from your NSB and **assign him/her the role of User Administrator**

**Exercise 22:** **Transfer** all the roles of your expert to another expert

**Exercise 23:** **Inactivate** the expert you have created in exercise 11

**Training environment :** <https://training.iso.org>

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## 2. Global Directory

### 2.2 Event Notifications

<https://login.iso.org>

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### What is Event Notifications?

- Inform users about changes made in the Global Directory such as changes in committee participation, role(s) or personal details

Two different types of notifications:

1. Automatic periodic emails
2. Online reports



*Notifications are sent within 24hr of the modifications*



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## My role as User Administrator in Event Notifications

- **Monitor the changes made to users administered by your Member Body**
  
- **Take action if you see any mistakes**
  - Make the necessary changes
  - Contact the user to request information
  - Contact ISO CS if applicable



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## What reports do I receive as User Administrator?

- **ISOGD member body administrator notifications**
  - ✓ Notifies you on changes related to your Member Body
    - Role updates of users (administrated by your Member Body)
    - Personal data updates of users (administrated by your Member Body)
    - Membership updates of your Member Body (P-Member; O-Member; Secretariat)
  
- **ISOGD individual notifications**
  - ✓ Notifies you on changes related to your profile such as personal information, roles etc...
  
- **Technical entities notifications**
  - ✓ Notifies you on creation, modification and deletion of TCs/SCs/WGs and PDCs for which your Member Body has a membership or liaison

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## What reports do other users receive?

### ➤ Technical entities notifications

- ✓ Notify Committee Officers on creation, modification and deletion of TCs/SCs/WGs and PDCs they are involved with.

### ➤ ISOGD individual notifications

- ✓ Notify users on changes made to their profile such as personal information, roles etc...

### ➤ ISOGD Committee notifications

- ✓ Notify Committee Officers on changes related to users on the TCs/SCs/WGs they are involved with, such as users added to roles, internal and external liaison updates etc...

### Other reports includes:

- Publication of standard under Vienna Agreement notifications
- Ballot or publication dates for project under Vienna Agreement etc...

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## What can I do in this application?

### ➤ Personalize reports

- ✓ Scheduling
- ✓ Format (HTML or Plain text)

### ➤ Run reports

- ✓ Run a report for a specific period of time

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## How to Navigate & Search: Layout

**ISO Event Notifications**

Available reports

Reports list

Name	New events	Frequency	Format	Type	Status
ISOGD individual notifications	0	Monthly		Personalized	Activated
ISOGD member body administrator notifications	0	Monthly		Personalized	Activated
Technical entities notifications	0	Monthly		Personalized	Activated

List of reports available

- ✓ Login details
- ✓ User guide
- ✓ Contact Helpdesk
- ✓ Logout

suter@iso.org  
2012-02-09

Audit Help

- **New events:** number of events since last time you executed the report
- **Frequency:** How often the report is sent
- **Format:** Format of the report
- **Type:** Generic or Personalized
- **Status:** Activated or deactivated

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## Event Notifications: How to Navigate & Search

### Event Notifications layout

**ISO Event Notifications**

Available reports

Reports list

Name	New events	Frequency	Format	Type	Status
ISOGD individual notifications	0	Monthly		Personalized	Activated
ISOGD member body administrator notifications	0	Monthly		Personalized	Activated
Technical entities notifications	0	Monthly		Personalized	Activated

List of reports available

- ✓ Login details
- ✓ User guide
- ✓ Contact Helpdesk
- ✓ Logout

suter@iso.org  
2012-02-09

Audit Help

- **New events:** number of events since last time you executed the report
- **Frequency:** How often the report is sent
- **Format:** Format of the report
- **Type:** Generic or Personalized
- **Status:** Activated or deactivated

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## Event Notifications: Personalize reports

**ISO Event Notifications**

**Available reports**

Reports list

Name	Actions
ISOGD individual notifications	Execute report Execute and send report Personalize
ISOGD member body administr...	Execute and send report
Technical entities notifications	Personalize

**Notifications**

Personalization

Report

Title: ISOGD individual notifications

Scheduling

Execute the report. (the report execution scheduling hour is midnight CET):

Day Every 1 day(s)

Week Every 1 week(s) on Monday

Month Every 1 month the First of the month

Delivery format

HTML Plain text

Save Cancel

Set up the Scheduling and Delivery format as per your requirement

## Event Notifications: Execute reports

**ISO Event Notifications**

**Available reports**

Reports list

Name	Actions
ISOGD individual notifications	
ISOGD member body administrator notifications	
Technical entities notifications	Execute report Execute and send report Modify personalization Delete personalization

**ISO Event Notifications** suter@iso.org 2012-06-06

**Report execution** Audit Help

Report

Title: Technical entities notifications

Criteria

Start date: 2012-06-01 End date: 2012-06-05

Execute Report Print Back

Define the start and end date and click on **Execute Report**

## Event Notifications: Execute reports

ISO Event Notifications suter@iso.org  
2012-06-06

---

Report execution Audit Help

**Report**

Title: Technical entities notifications

**Criteria**

Start date: 2012-06-01 End date: 2012-06-05

**Results**

5 events have been found during report execution from 2012-06-01 to 2012-06-05.

Committee	Date	Event
ISO/TC 4/WG 19	2012-06-05	modified as Disbanded
ISO/TC 68/SC 4/WG 14	2012-06-04	created as Active
ISO/TC 102/SC 2/WG 50	2012-06-05	created as Active
ISO/TC 113/SC 5/WG 5	2012-06-01	created as Active
ISO/TC 145/SC 2/WG 5	2012-06-05	modified as Disbanded

## Exercises for home



### *In Event Notifications...*

**Exercise 24:** Execute the ISOGD member body administrator notification report

**Exercise 25:** Change the frequency and format of the ISOGD individual notifications report

Live environment : <https://login.iso.org>

**No Training Environment**

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<b>Timeline</b>	
<p><b>Day 1</b></p> <ul style="list-style-type: none"> <li>1. Introduction               <ul style="list-style-type: none"> <li>1.1 ISO Members</li> <li>1.2 Standards Development</li> <li>1.3 ISO Online &amp; ISODOC</li> <li>1.4 ISO Systems Overview</li> <li>1.5 Single Sign-One (SSO)</li> </ul> </li> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory</li> </ul> </li> </ul>	<p><b>Day 2 - Continue</b></p> <ul style="list-style-type: none"> <li>4. Access to International Standards               <ul style="list-style-type: none"> <li>4.1 ISOSTD &amp; ISO Online</li> </ul> </li> </ul>
<p><b>Day 2</b></p> <ul style="list-style-type: none"> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory – Continue</li> <li>2.2 Event Notifications</li> </ul> </li> <li>3. ISO eServices Applications               <ul style="list-style-type: none"> <li>3.1 ISO eCommittees</li> <li>3.2 ISO Meeting Management</li> <li>3.3 ISO Project Portal</li> <li>3.4 ISO eBalloting</li> </ul> </li> </ul>	<p><b>Day 3</b></p> <ul style="list-style-type: none"> <li>5. National Solutions               <ul style="list-style-type: none"> <li>5.1 NTCLite: National eCommittees Lite</li> <li>5.2 ISOLutions</li> </ul> </li> <li>6. My role as User Administrator - Summary</li> <li>7. Online Meetings               <ul style="list-style-type: none"> <li>7.1 WebEx</li> </ul> </li> <li>8. ISO Connect</li> <li>9. Support, Helpdesk and Conclusion</li> </ul>

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## 3. ISO eServices Applications

### 3.1 eCommittees

**<https://login.iso.org>**

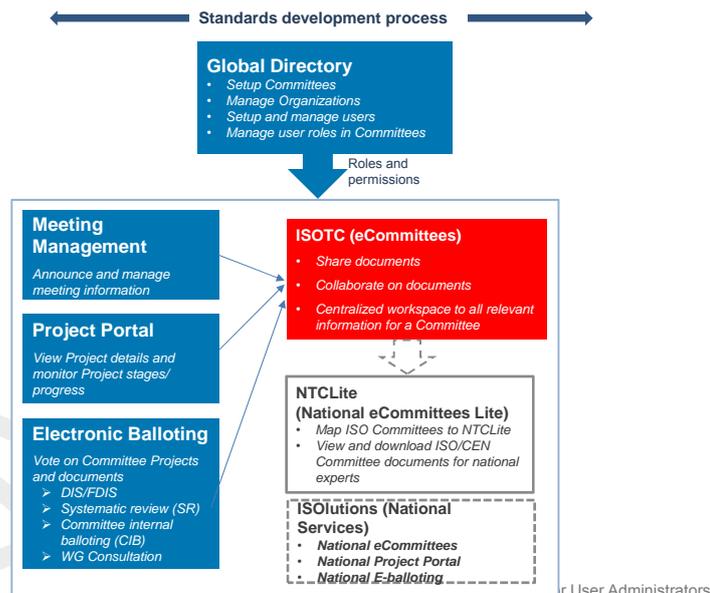
eServices for User Administrators 

## What is eCommittees?

- Online document management
- Online collaboration for committee members
- Decentralized management of the committee by secretaries
- Communication of important committee events
- ISO eCommittees has been developed specifically to aid the international standards development process



## How does ISOTC fit with other eServices applications?



## My role as User Administrator in eCommittees

➤ **None** – User Administrators have no role in this application.

But are responsible for:

- Giving access to eCommittees through the roles assigned to their members in the Global Directory (GD)  
*Example: Committee Member, Observer etc...*
- Maintaining the Member List, through user role management in the Global Directory (GD)



## Data Ownership & Permission

User Administrator	Committee Members	Committee Officers
<ul style="list-style-type: none"><li>• Can see documents in folder 01. Public information only</li></ul>	<ul style="list-style-type: none"><li>• Can see documents in folders, except 00. Secretariat Workspace and 07. Documents – ISO/CS to committees</li><li>• Can upload content in folder 05. Drop-in box for members</li></ul>	<ul style="list-style-type: none"><li>• Can upload documents, create notifications, add and change folders below the main folder structure level</li></ul>





## How to Navigate & Search continue...

The screenshot displays the ISO website interface with several key sections highlighted by red boxes and labeled with blue text:

- Search:** Located at the top left, featuring a search bar and an "Advanced Search" link.
- Links:** Located at the top right, containing navigation links like "Home", "About Us", and "Contact Us".
- Navigation:** A vertical menu on the left side listing various site sections such as "Home", "About Us", "Contact Us", and "Facilities".
- Documents:** A central section showing a list of documents with columns for "Type", "Name", and "Size".
- Ballots:** A section on the right displaying a table of ballot information, including "Type", "Reference", and "End" dates.
- News:** A section below Documents showing a list of news items with columns for "Type", "N Number", "Name", and "Modified" dates.
- Meetings:** A section on the right displaying a table of meeting information, including "Title", "Date", "Country", "City", and "Status".
- Structure:** A section below News showing a hierarchical tree structure of ISO standards.
- Forums:** A section at the bottom right with a heading "Forums" and a sub-heading "There are no items to show in this view."

The ISO logo is visible in the bottom right corner of the screenshot.

## How to Navigate & Search: Member list

- List of all the Committee members by roles
- Can be exported (CSV for excel) and printed
- Easy filtering and sorting
- Always in up-to-date with the Global Directory

## How to Navigate & Search: Member list

**Quick Filter**  
A full text filter for a quick search on members of the committees

**CSV/Print**  
Export the member list to a CSV file (e.g. to import into MS Excel) or print out the list

Default sort  
Resets the sorting to the default setting (by role)

Quick Filter:

Default Sort CSV Print

Role	Body	Name	E-Mail
Chairperson	BSI (United Kingdom)	Pinn, Julian	jpinn@bsi.co.uk
Secretary	ANSI (USA)	Symes, Peter	psymes@ansi.org
P-Member	AFNOR (France)	no assignment	-
P-Member	ANSI (USA)	Team, ANS	ansi@ansi.org
P-Member	BSI (United Kingdom)	Committee, Vice, Centre	vc@bsi.co.uk
P-Member	BSI (United Kingdom)		vc@bsi.co.uk
P-Member	DIN (Germany)		gc@din.de
P-Member	DIN (Germany)		gc@din.de
P-Member	DIN (Germany)		gc@din.de
P-Member	DIN (Germany)		gc@din.de
P-Member	DIN (Germany)	Klindt, Cornelia	cklindt@din.de

**No Assignment**  
Displayed when there is a P-Member country with no member assigned in the Global Directory.



## How to Navigate & Search: Ballots

- List of all active ballots for the Committees, sorted by type and closing date
- Direct link to the ballot in the Balloting Portal (permission required)
- List can be sorted by Type, Reference or Closing Date

 **Ballots**

Type	Reference	End ▼
CIB	<a href="#">ISO/TC 43 N 1136 - 1CD 532-1</a>	2010-05-03
CD	<a href="#">ISO/CD 1999.2 - N 1139 - Second ISO/CD 1999</a>	2010-06-04
SR	<a href="#">ISO 389-3:1994 (vers 3)</a>	2010-06-15
SR	<a href="#">ISO 389-4:1994 (vers 3)</a>	2010-06-15
SR	<a href="#">ISO 389-6:2007</a>	2010-06-15
DIS	<a href="#">ISO/DIS 26101</a>	2010-07-19
DIS	<a href="#">ISO/DIS 28961</a>	2010-07-24



## How to Navigate & Search: Meetings

- List of all the Committee meetings sorted by date, place and status
- Direct link to the meeting in the meeting management tool (permission required)
- List can be sorted by Title, Date, Country, City or Status
- The meetings are currently registered by ISO/CS

Meetings				
Title ▾	Date	Country	City	Status
<a href="#">9th meeting</a>	2009 November	Israel	Tel Aviv	Definite
<a href="#">10th meeting</a>	2010 May	Netherlands	-	Proposed
<a href="#">11th meeting</a>	2010 November	Malaysia	-	Proposed
<a href="#">12th meeting</a>	2011 May	Iran, Islamic Republic of	Tehran	Proposed
<a href="#">13th meeting</a>	2011 November	Netherlands	-	Proposed



## Demo



### *In eCommittees...*

- Show eCommittees environment and different sections
- View Member List

**Training environment :** <https://training.iso.org>

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### 3. ISO eServices Applications:

#### 3.2 Meeting Management

<https://login.iso.org>

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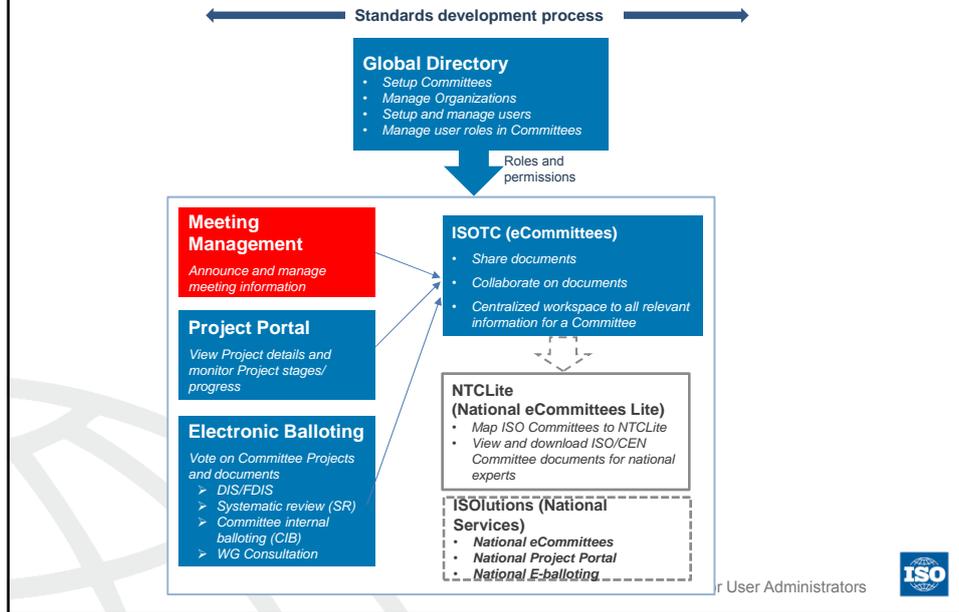
### What is Meeting Management?

- Central access point to ISO meetings (organizers, participants, ISO/CS)
- Reduce management and maintenance overhead (duplication of work)
- Consistent process before and after meeting is held
- Close integration to eCommittees for committee work
- A central database of all ISO meetings (including governance and policy groups)
- The ISO STAND Administrators are responsible for creating meetings. If you would like a meeting setup in the Meeting Management Tool, please send an email to [tcsupport@iso.org](mailto:tcsupport@iso.org) with the details of your meeting
- Document types available for meetings:

Icon	Description
A	Agenda
M	Minutes
R	Resolutions
P	Participant List



## How does MM fit with other eServices applications?



## My role as User Administrator in Meeting Management

- **None** - User Administrators have no role in this application



## Data Ownership & Permission

- **Read only** access to "Public" information in Meeting Management module



Access to linked documents hosted on ISO eCommittees requires TC membership



## How to Navigate & Search

### My Committee Meetings

All meetings in your committees

### ISO Meetings

All ISO meetings as displayed on ISO Online

### Filter

Filter list using predefined criteria

The screenshot shows the ISO Meeting Management interface. A search box is visible at the top with the text "Search for Meetings". Below it is a table of meetings with columns for Committee, Title, Date, Country, City, Documents, and Status. Annotations include:

- Warning Icons:** A box pointing to red triangle icons in the first column of the table, stating "Various types of icons indicate warnings about missing information".
- Meeting Name:** A box pointing to the "Title" column, stating "To view the meeting details, click on the meeting name".
- Actions:** A box pointing to the "Actions" column, stating "Print and export the Meetings list".
- Filter:** A box pointing to the "Filter" dropdown menu on the right side of the table.

Committee	Title	Date	Country	City	Documents	Status
ISO/TC 115/SC 2	10th.meeting	2010-03-17	France	Paris		Proposed
ISO/TC 115/SC 1	10th.meeting	2010-03-18	France	Paris		Proposed
ISO/TC 115/SC 4	8th.meeting	2010-03-18	France	St Denis		Convened
ISO/COUNCIL	87th.meeting	2010-03-18 to 2010-03-19	Switzerland	Geneva		Default
ISO/TC 119	14th.meeting	2010-03-19	France	Paris		Proposed
ISO/TC 219	12th.meeting	2010-03-22 to 2010-03-23	Netherlands	Amsterdam		Convened
ISO/TC 241	8th.meeting	2010-03-22 to 2010-03-25	China	Beijing		Convened
ISO/TC 87/SC 7	27th.meeting	2010-03-24 to 2010-03-25	United Kingdom	London		Proposed
ISO/TC 89/SC 3	13th.meeting	2010-03-24 to 2010-03-25	China	Shanghai		Convened
ISO/TC 89/SC 1	12th.meeting	2010-03-25	China	Shanghai		Convened
ISO/TC 89/SC 2	12th.meeting	2010-03-25	China	Shanghai		Convened
ISO/TC 184/SC 5	20th.meeting	2010-03-25	China	Tianjin		Default
ISO/TC 150/SC 34 & WG4	23rd.meeting			Stockholm		
ISO/TC 89	19th.meeting			Shanghai		
ISO/TC 158 & WG4	23rd.meeting			Suzhou		



## Demo

---



### *In Meeting Management...*

- Access ISO Meeting Management application
- Search meetings
- Meetings available to public on ISO Online

Live environment : <https://login.iso.org>

***No Training Environment***

eServices for User Administrators



## 3. ISO eServices Applications:

### 3.3 Project Portal

**<https://login.iso.org>**

eServices for User Administrators

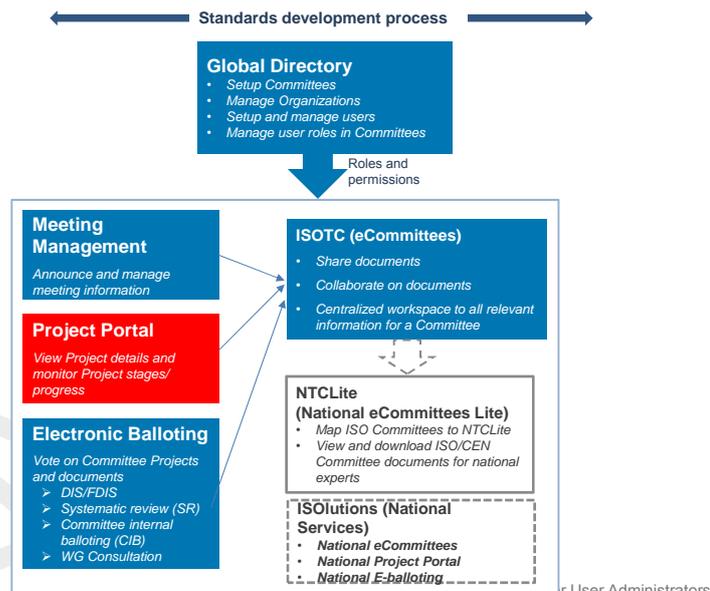


## What is Project Portal?

- Project Management tool for the Committee Secretary
- The project portal offers detailed information about ISO projects
- You can search for projects using different criteria:
  - Committees / Sub-Committees
  - Current stage
  - Title
  - Stage date
- Contains information about the project history, stages, timeframes, etc.



## How does PP fit with other eServices applications?



## My role as User Administrator in Project Portal

- **None** - User Administrators have no role in this application.



## Data Ownership & Permission

- **Read only** access to "Public" information in Project Portal module



*Access to linked documents hosted on ISO eCommittees requires TC membership*



## How to Navigate & Search: Search for projects

The screenshot shows the ISO Project Portal search results page. The interface includes a search bar at the top with options for 'Simple search' and 'Search by stages'. Below the search bar, there are filters for 'Committee' (ISO/TC 6/SC 5), 'Status' (Active), and 'Title'. A table of search results is displayed with columns for 'Alert Reference', 'Document title', 'Reg. date', 'Crnt stage', 'Stage date', 'Limit date', 'VA', 'Time frame', 'Committee', and 'Project leader'. The table lists several projects related to pulp and paper technology. Below the table, there are summary statistics for 'Warning (1)', 'Cancelled (0)', 'Cancelled by TMB (0)', and 'Pending decision (2)'. A 'Highlighted tabs - Search results filters' box points to the search filters. A 'Multiple search criteria' box points to the search results table. A 'Different search options' box points to the search bar.

**Different search options**

**Multiple search criteria**

**"Highlighted tabs" - Search results filters**

Alert Reference	Document title	Reg. date	Crnt stage	Stage date	Limit date	VA	Time frame	Committee	Project leader
ISO/DIS 5270	Pulps - Laboratory sheets - Determination of physical properties			1011-05-22	2011-11-19	ISO	36	ISO/TC 6/SC 5/WG 23	-
ISO 5350-3:2007 (Ed. 2)	Pulps - Estimation of dirt and shives by reflected light using Equivalent Bl			1011-03-17	-	-	48	ISO/TC 6/SC 5	-
ISO/HP TR 11371	Pulps - Basic guidelines for refining	2009-11-19	10 99	2009-11-19	-	-	-	ISO/TC 6/SC 5/WG 24	-
ISO/HP TR 13159	Pulps - Basic guidelines for fibre characterization	2008-06-12	10 99	2008-06-12	-	-	-	ISO/TC 6/SC 5/WG 18	-

## How to Navigate & Search: Project Details

The screenshot shows the ISO Project Portal search results page, similar to the previous one. A 'Project details' box points to the 'Project details' link in the search results table. A text box explains that clicking on the project Reference or selecting 'Project details' from the Functions menu will direct the user to the Submission Interface. Another text box notes that the Functions menu also provides a direct link to the Submission Interface.

**Project details**  
Click on the project Reference or select Project details from the Functions menu.  
Under Functions menu also direct link to Submission Interface.

Alert Reference	Document title	Reg. date	Crnt stage	Stage date	Limit date	VA	Time frame	Committee	Project leader
ISO/DIS 5270	Pulps - Laboratory sheets - Dete								
ISO 5350-3	Pulps - Estimation of dirt and shives by reflected light using								
ISO/HP TR 11371	Pulps - Basic guidelines for refin								
ISO/HP TR 13159	Pulps - Basic guidelines for fibre								

## How to Navigate & Search: Project History

**ISO Project Portal** illander@iso.org  
2008-08-28

**Project details** Report Tools

**Project ID 50986**

Project reference: ISO/PR 14051      Edition: 2      Vienna agreement (VA): -  
 Current stage: 10.99      Stage date: 2008-03-07      Stage version: 1  
 Registration date: 2008-03-07      Time in months: 5      Time frame in months: 36

English title: Environmental management – Material flow cost accounting – General principles and framework  
 French title: Titre manqué  
 Status: Normal

[Back to default search](#)   [Print](#)

**Committee**

Committee: ISO/TC 207  
 Project leader: -      ISO tech. prog. manager (TPM): Clivio, Sophie Mme (ISO)   
 Secretariat: SCC      Secretary: Boethmer, Kevin Mr. (CSA)

**Stage history**

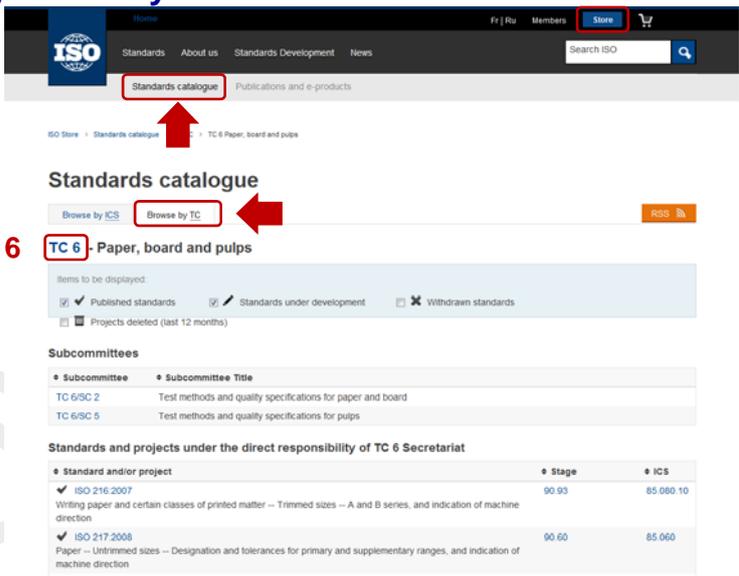
Stage	Version	Description	Limit date	Started	Status
10.00	1	Proposal for new project registered		2007-12-07	CLOSED
10.20	1	New project ballot initiated		2007-12-07	CLOSED
10.60	1	Close of voting		2008-03-07	CLOSED
10.99	1	New project approved		2008-03-07	CURRENT
30.00		Committee draft (CD) registered	2009-03-07		WAIT
40.00		DIS registered	2009-09-07		WAIT
50.00		FDIS registered for formal approval	2010-09-07		WAIT
60.60		International Standard published	2011-03-07		WAIT

[Back to default search](#)   [Print](#)



## How to Navigate & Search

### Programme by Committee on ISO Online



Home Fr | Ru   Members   Store

Standards   About us   Standards Development   News  

**Standards catalogue** Publications and e-products

ISO Store > Standards catalogue > TC 6 Paper, board and pulps

**Standards catalogue** RSS

Browse by ICS   **Browse by TC**

**For TC 6** **TC 6** - Paper, board and pulps

Items to be displayed:  
 Published standards    Standards under development    Withdrawn standards  
 Projects deleted (last 12 months)

**Subcommittees**

Subcommittee	Subcommittee Title
TC 6/SC 2	Test methods and quality specifications for paper and board
TC 6/SC 5	Test methods and quality specifications for pulps

**Standards and projects under the direct responsibility of TC 6 Secretariat**

Standard and/or project	Stage	ICS
<input checked="" type="checkbox"/> ISO 216:2007 Writing paper and certain classes of printed matter – Trimmed sizes – A and B series, and indication of machine direction	90.93	85.080.10
<input checked="" type="checkbox"/> ISO 217:2008 Paper – Untrimmed sizes – Designation and tolerances for primary and supplementary ranges, and indication of machine direction	90.60	85.060



## Demo



### *In Project Portal...*

- Access the Project Portal
- Use the Simple Search and Search by Stages
- Display the details of a project
- Download project list to Excel
- Project stages available to public on ISO Online

Live environment : <https://login.iso.org>

***No Training Environment***

eServices for User Administrators



## 3. ISO eServices Applications:

### 3.4 eBalloting

**<https://login.iso.org>**

eServices for User Administrators



## What is eBalloting?

Electronic platform used by NSBs to vote on ISO committee projects and documents

### Type of Ballots:

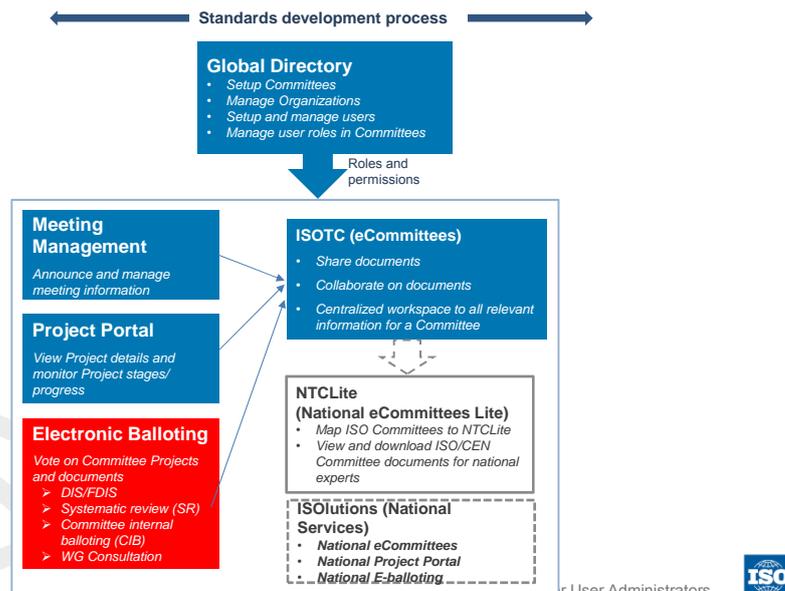
- **Committee Internal Ballots (CIB)**  
New Work Item Proposal (NP), Committee Draft (CD) and others
- **Working Group Consultations**  
Opinion gathering in WGs
- **Ballots on DIS and FDIS**  
Organized by ISO/CS; results of ballots are collected and managed by the committees
- **Systematic Reviews (SR) Ballots**  
Organized by ISO/CS; results collected and managed by committees



eServices for User Administrators

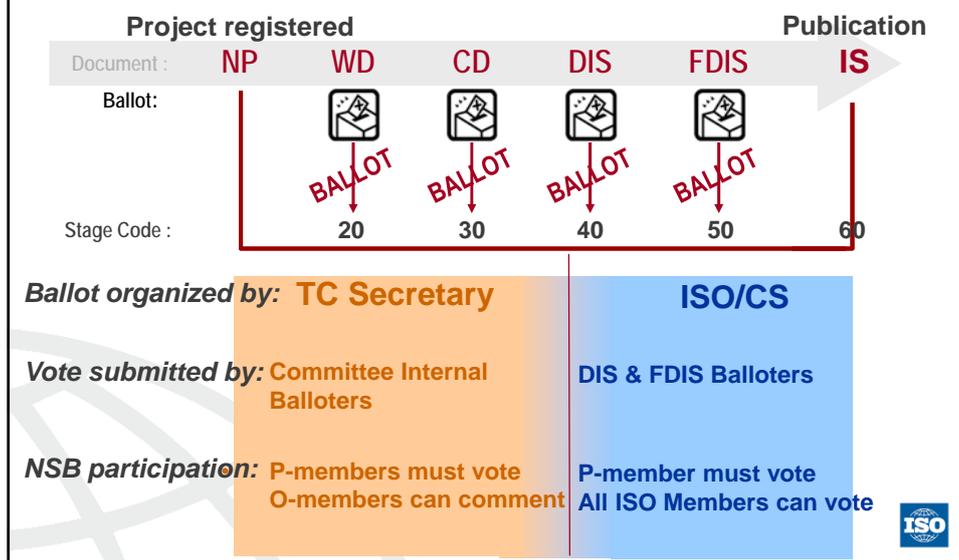


## How does EB fit with other eServices applications?



## What is eBalloting?

### Main stages – Balloting instances



## My role as User Administrator in eBalloting

### User Administrator:

- No role in this application
- Responsible for giving access and voting rights through the roles assigned to their members in the Global Directory (GD):
  - Committee internal balloter (CIB), WG Committee Member (WC), Balloters for DIS, Balloters for FDIS, Centralized Balloter

### Centralized balloter:

CIB Balloter	Cast votes/comments for <b>all</b> CIB ballots where NSB is P- or O-Member in TC or SC
Balloters for DIS	Cast votes for <b>all</b> DIS ballots
Balloters for FDIS	Cast votes for <b>all</b> FDIS ballots



## Data Ownership & Permission

- ✘ **User Administrator:** no permission and cannot see any ballots
- ✔ **Centralized balloters:** can access ballots for which they are allowed to vote

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## Data Ownership & Permission: Balloting roles

Roles in the ISO GD	Definitions
<b>Secretary</b>	Responsible to initiate and run the balloting process.
<b>Committee internal balloter</b>	An individual representing a NSB who is authorized to vote on CIB ballots submitted by a committee
<b>DIS Voter</b>	An individual representing a NSB, who is authorized to vote on a Draft International Standard (DIS).
<b>FDIS Voter</b>	An individual representing a NSB who is authorized to vote on a Final Draft International Standard (FDIS).
<b>SR Voter*</b>	An individual representing a NSB who is authorized to vote for the Systematic Review Ballots
<b>Commenter</b>	Person representing a NSB who has no right to vote on a ballot, but who can submit a comment on a ballot document
<b>Ballot monitor</b>	Person representing a NSB who has read/viewer-access to ballots relevant for its organization

\*Register the person as a DIS voter in addition to the SR voter so they can get the correct access to vote on SR ballots (until GD3 Satellites applications have been migrated).

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## Data Ownership & Permission

---

### Stages of eBalloting for DIS and FDIS

1. Ballot opens
2. Notification from ISO CS to the registered balloters and to the Committee Chair and Secretary
3. Balloters and liaisons have access to the ballot documents
4. National consultation process inside the NSBs
5. National voting and decision - comments
6. Reminder notifications (1 to 4 weeks)
7. Ballots closes
8. Closing notification to balloters, Chair and Secretary
9. Results and comments are available
10. Follow-up actions by the Chair and the Secretary



## Data Ownership & Permission

---

### DIS/FDIS Voting Obligations for Member Bodies

- Mandatory ballots
  - NSB with secretariat or P-membership of a committee **must** vote
- Optional ballots
  - O-members are not required to vote
  - NSBs that are not members of the committee are not required to vote



## Data Ownership & Permission

### Downgrading for missed ballots



If a Member Body **fails to vote** in 25% or more of the ballots of a Committee where is a P-member, it **can be downgraded** to O-membership in that Committee, unless it can offer valid explanations



## How to Navigate & Search

All ballot instances suter@iso.org  
2012-02-14

All open Tools Help

All mandatory Vote required All open New last 2 weeks Closing in 2 weeks Closed last 2 weeks Search

2259 ballots found Add New Items...

Type	Committee / Working Group	Reference	Vote
CD	ISO/TC 23/SC 18	<a href="#">ISO/CD 9912-3</a>	ballot owner
FDIS	ISO/TC 146/SC 6	<a href="#">ISO/FDIS 16000-26</a>	ballot owner
CD	ISO/TC 164/SC 1	<a href="#">ISO/CD 6892-3</a>	ballot owner
NP	ISO/TC 172/SC 9	<a href="#">ISO NWIP Cleanliness</a>	ballot owner
NP	ISO/TC 172/SC 9	<a href="#">ISO/NP 13142</a>	
CIB	ISO/IEC JTC 1/SC 27	<a href="#">ISO-IEC/JTC 1-SC27_N10618 (NO OBLIGATION TO VOTE)</a>	12 votes, 1 comment 2011-11-11 2012-02-13 Ballot owner
CIB	ISO/IEC JTC 1/SC 27	<a href="#">ISO-IEC/JTC 1-SC27_N10679 (NO OBLIGATION TO VOTE)</a>	21 votes 2011-11-09 2012-02-14 Ballot owner
CD	ISO/TC 17/SC 4	<a href="#">ISO/CD 16143-1</a>	17 votes 2012-01-05 2012-02-14 Ballot owner
CD	ISO/TC 17/SC 4	<a href="#">ISO/CD 16143-2</a>	11 votes 2011-12-14 2012-02-14 Ballot owner
CD	ISO/TC 17/SC 4	<a href="#">ISO/CD 16143-3</a>	11 votes 2011-12-14 2012-02-14 Ballot owner

**List of ballots**

Click on the ballot reference name to open a specific ballot



## How to Navigate & Search

### All ballot instances

All open

2259 Ballots found << 1 - 20 >>

Tab	Description
All mandatory	Displays all ballots for committees where your NSB is a P-member independently to the fact that the balloter has already voted or not
Vote required	Displays all ballots for committees where your NSB is a P-member and has not yet voted
All open	Displays <b>all ballots</b> on which you can vote or submit a comment.
New last 2 weeks	Displays all ballots which were <b>opened within the last 2 weeks</b>
Closing in 2 weeks	Displays all open ballots which will <b>close during the next 2 weeks</b> .
Closed last 2 weeks	Displays all ballots which <b>closed during the last 2 weeks</b> .
Search	Opens the search screen which allows to search with user defined values

## How to Navigate & Search

### Search for ballots

All ballot instances suter@iso.org  
2012-02-14

Search Tools Help

Type: All Reference or Title: Start date: from End date: to

Status: All Committee / Working Group: All

Search Fields	Description
Type	Type of ballot
Status	Ballot stages
Ref/Title	Ballot reference number or document title element
Committee	Only those committees to which your profile is registered will be displayed
Start and End date	Opening and Closing date
From/To	Range Start Date

To start your search, please define one criterion (or several criteria) to search for.

## Navigate & Search

### Access Ballot Files

All ballot instances suter@iso.org  
2012-02-15

All open > ISO/CD 16143-3 Tools Help

**Information** | Participation | Audience

**Metadata**

Reference	ISO/CD 16143-3	Committee	ISO/TC 17/SC 4
Type	CD (Committee Draft (ISO))	Version number	
Voting stage	Committee	Start date	2011-12-14
Start date	2011-12-14	End date	2012-02-14
Opened by ISO/CS on	2011-12-14 00:11	Closed by ISO/CS on	
Status	Open	Created on	2011-12-13 12:17:04.0

**Project information**

Reference	ISO/CD 16143-3	CSNumber	59412
Edition number	2	Committee	ISO/TC 17/SC 4
English title	Stainless steels for general purposes		
French title	Aciers inoxydables pour usage g�n�ral		

**Reference documents and links**

- N 2070 ISO\_16143-3\_(F)\_CD

**Votes and comments**

**Ballot documents**

## How to Navigate & Search

### View the Ballot Audience

All ballot instances ham@iso-global.com  
2012-02-15

All open > ISO/NP 2969 Tools Help

**Information** | Participation | **Audience**

**Reference: ISO/NP 2969**

Committee	ISO/TC 36	Start date	2011-11-29
Status	Open	End date	2012-02-29

**Note**

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

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

In order to ensure confidentiality among the recipients to your emails, remember to use the "bcc" field of your email application, not the usual "to" or "cc" fields.

**Ballot owner**

User	Business role
Agel, Helger Mr.	Ballot Owner representing ISO
Destobles, Corinne Mrs.	Ballot Owner representing ISO
Gallier-Cuoko, Martine Mme	Ballot Owner representing ISO
Garca, Blandina Mme	Ballot Owner representing ISO
Corbier, Patricia Mrs.	Ballot Owner representing ISO
Wahl, Anna Mme	Ballot Owner representing ISO
Muhsen, Anna Mrs.	Ballot Owner representing ISO
Winkel-Lud, Bianca-Elke Mme	Ballot Owner representing ISO

**View Ballot Owners, Obligated Voters, Commenters, Monitors etc.**

## How to Navigate & Search

### Download Ballot Results and Comments

**All ballot instances** suter@iso.org  
2012-02-15

Closed last 2 weeks > ISO/TC 17/SC 19 doc. N 704 Tools Help

**Information** **Result** Add New Rem...

Reference: ISO/TC 17/SC 19 doc. N 704  
Committee: ISO/TC 17/SC 19  
Status: Closed  
Start date: 2011-12-15  
End date: 2012-01-31

**Download**

Download voting result and comments as a Zip file

**Member responses**

Votes cast (13): Argentina (IRAM) Brazil (ABNT) Czech Republic (UNMZ) Finland (SFS) France (AFNOR) Germany (DIN) India (BIS) Italy (UNI) Japan (JISC) Korea, Republic of (KATS) Poland (PKN) Sweden (SIS) United Kingdom (BSI)

Comments submitted (0)

Votes not cast (6): Austria (AS) China (SAC) Egypt (EOS) Hungary (MSZT) Russian Federation (GOST R) USA (ANSI)

**Questions**

Q.1 "Taking into consideration the results of ISO Systematic review, the ISO 9329-2:1997 shall be"

Votes by members

Q.1

## Cast Vote and Submit Comments

**STEP 1:** Search and access the ballot you need to vote on

**STEP 2:** Click on **Cast vote** as or **Submit Comment** as

**STEP 3:** Select your NSB and cast vote

**Information** **Participation** **Audience** Add New Rem...

**Metadata**

Reference: ISO/CD 16143-3  
Type: CD (Committee Draft (ISO))  
Committee: ISO/TC 17/SC 4

**Vote**

Reference: ISO/CD 16143-3  
Committee / Working Group: ISO/TC 17/SC 4  
Status: Open  
Opening date: 2011-12-14  
Closing date: 2012-02-14

Vote: - select a participant -  
Do you agree to the circulation of the draft as a DIS? - select an answer -  
by Suter, Julie Mme

Cast vote Reset Cancel





## Timeline

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 10px;"><b>Day 1</b></div> <ul style="list-style-type: none"> <li>1. Introduction               <ul style="list-style-type: none"> <li>1.1 ISO Members</li> <li>1.2 Standards Development</li> <li>1.3 ISO Online &amp; ISODOC</li> <li>1.4 ISO Systems Overview</li> <li>1.5 Single Sign-One (SSO)</li> </ul> </li> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory</li> </ul> </li> </ul>	<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 10px;"><b>Day 2 - Continue</b></div> <ul style="list-style-type: none"> <li>4. Access to International Standards               <ul style="list-style-type: none"> <li>4.1 ISOSTD &amp; ISO Online</li> </ul> </li> </ul>
<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 10px;"><b>Day 2</b></div> <ul style="list-style-type: none"> <li>2. Global Directory &amp; Event Notifications               <ul style="list-style-type: none"> <li>2.1 Global Directory – Continue</li> <li>2.2 Event Notifications</li> </ul> </li> <li>3. ISO eServices Applications               <ul style="list-style-type: none"> <li>3.1 ISO eCommittees</li> <li>3.2 ISO Meeting Management</li> <li>3.3 ISO Project Portal</li> <li>3.4 ISO eBalloting</li> </ul> </li> </ul>	<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 10px;"><b>Day 3</b></div> <ul style="list-style-type: none"> <li>5. National Solutions               <ul style="list-style-type: none"> <li>5.1 NTCLite: National eCommittees <i>Lite</i></li> <li>5.2 ISOLutions</li> </ul> </li> <li>6. My role as User Administrator - Summary</li> <li>7. Online Meetings               <ul style="list-style-type: none"> <li>7.1 WebEx</li> </ul> </li> <li>8. ISO Connect</li> <li>9. Support, Helpdesk and Conclusion</li> </ul>

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## 4. Access to International Standards

### 4.1 ISOSTD & ISO Online

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## ISO Online: Store

ISO Store

**ISO 9001 for Small Businesses**  
Advice from ISO/TC 176

**ISO 9001**  
A handbook for small businesses

How to buy

**Standards catalogue**  
Search the standards catalogue  
eg. ISO 9001

**Publications & e-products**  
Search publications  
eg. quality

**Best-selling Standards**  
ISO 26000:2010  
Guidance on social responsibility  
ISO 31000:2009  
Risk management - Principles and guidelines  
ISO 14001:2004  
Environmental management systems

**Best-selling Publications**  
ISO 9001 for Small Businesses. What to do  
ISO 22000. Food safety management systems. An easy-to-use checklist for small business. Are you ready?  
ISO 14001. Environmental management systems. An easy-to-use checklist for small

**Buy from your national ISO member**  
You can purchase ISO Standards and other ISO publications from the ISO member in your country.  
The list of [ISO Members](#) shows contact information for all ISO members including

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## ISO Online: Store – Standards catalogue

Standards catalogue

ISO has developed over 19 000 International Standards and all are included in the ISO Standards catalogue.

There are three ways to find the standard you are looking for:

- You can browse by ICS (International Classification for Standards).** ICS is a way of classifying standards into fields such as electrical engineering or paper technology.
- You can browse by TC (technical committees).** ISO standards are developed by experts from TCs focusing on all kinds of different subjects from screw threads to shipping technology. By clicking on the TC you can see all the standards published by this group of experts.
- You can search the standards catalogue** using a key word or the number of the standard (all ISO standards are numbered) for example 'quality management' or '9001' to find ISO 9001.

Search the standards catalogue  
eg. ISO 9001

Browse by ICS | Browse by TC

ICS	Field
01	Generalities, Terminology, Standardization, Documentation
03	Services, Company organization, management and quality, Administration, Transport, Sociology
07	Mathematics, Natural Sciences
11	Health care technology
13	Environment, Health protection, Safety

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## ISOSTD

### What is it?

- Livelink repository for ISO publications (DIS/FDIS/IS)
- Stores the electronic versions of all published ISO Standards (including graphic files in TIFF and EPS formats)



### My role as User Administrator in this application

- None



### How to Access?

- Member body access ISO Standards via :
  - ISOSTD homepage : <http://pod.iso.org/isostd/>
  - or ISOSTD link in the STADIST newsletter
- User accounts managed by ISO/CS and not in the ISO GD
- Only 1 access per member body, usually CEO

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## Timeline

### Day 1

1. Introduction
  - 1.1 ISO Members
  - 1.2 Standards Development
  - 1.3 ISO Online & ISODOC
  - 1.4 ISO Systems Overview
  - 1.5 Single Sign-One (SSO)
2. Global Directory & Event Notifications
  - 2.1 Global Directory

### Day 2

2. Global Directory & Event Notifications
  - 2.1 Global Directory – Continue
  - 2.2 Event Notifications
3. ISO eServices Applications
  - 3.1 ISO eCommittees
  - 3.2 ISO Meeting Management
  - 3.3 ISO Project Portal
  - 3.4 ISO eBalloting

### Day 2 - Continue

4. Access to International Standards
  - 4.1 ISOSTD & ISO Online

### Day 3

5. National Solutions
  - 5.1 NTCLite: National eCommittees Lite
  - 5.2 ISolutions
6. My role as User Administrator - Summary
7. Online Meetings
  - 7.1 WebEx
8. ISO Connect
9. Support, Helpdesk and Conclusion

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## 5. National Solutions

### 5.1 National eCommittees Lite (NTCLite)

<https://login.iso.org>

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### What is National eCommittees Lite (NTCLite) ?

- Dissemination tool for National Committees
- Provides ISO Members with the ability to efficiently manage and control the **read-only access** of their national eCommittee members to working documents in the ISO technical programme
- Dissemination to national stakeholders of all documents under development in ISO committees and working groups
  - E.g.: reports of meetings, ballots and comments, working drafts, etc.



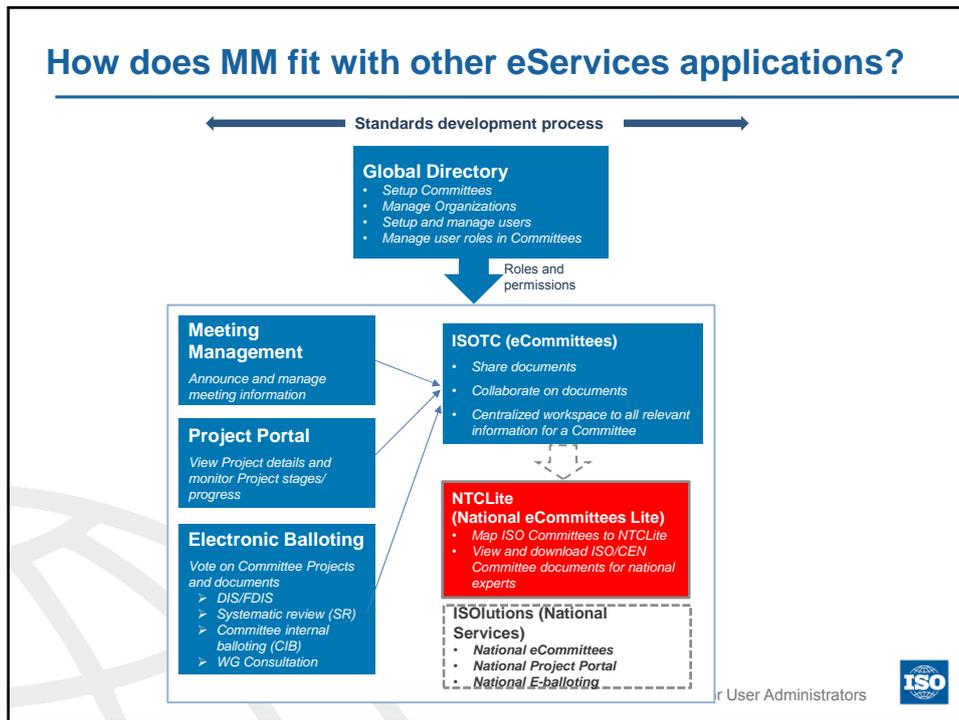
*NTCLite also disseminate CEN documents for CEN members only*



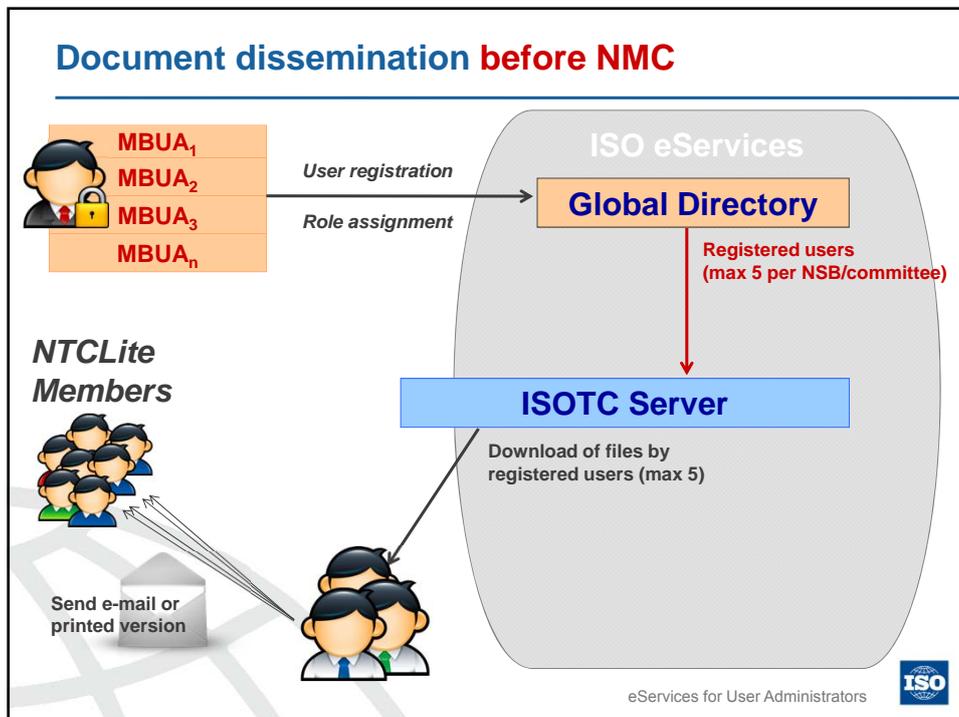
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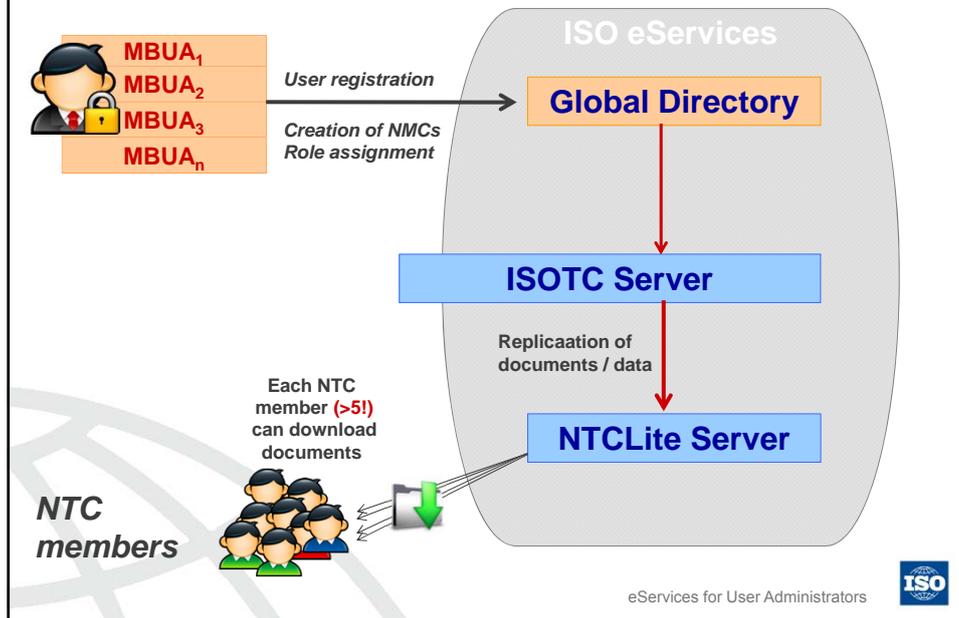
## How does MM fit with other eServices applications?



## Document dissemination before NMC



## Document dissemination with NTCLite



## My role as User Administrator in NTCLite

### ➤ National committees creation and setup in ISO Global

#### Directory :

- Creation of National committees
- Mapping between National committees and ISO committees
- Create NTCLite users and assign them to National committees  
e.g. : National Secretaries, National committee members, etc...

### ➤ Define ISO NTCLite settings

- Defining international document filter settings
- Defining automatic notification settings



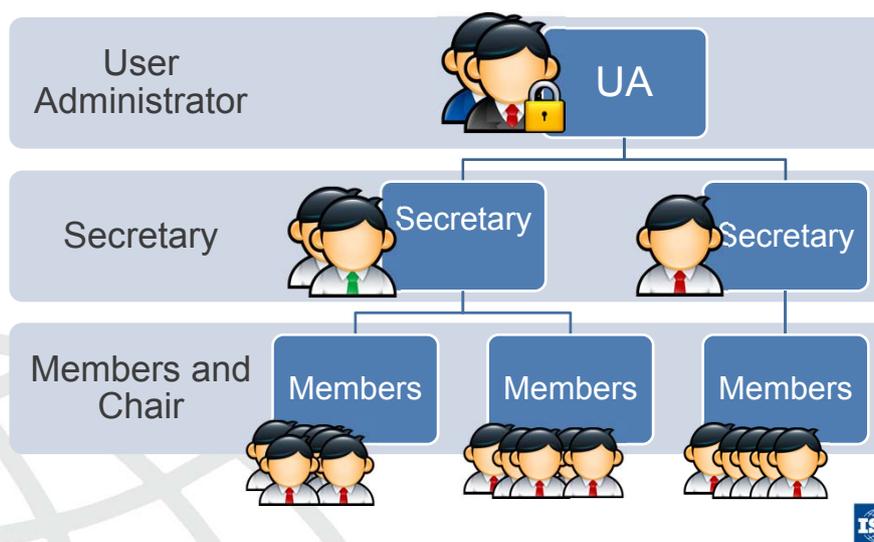
## Data Ownership & Permission

- In **ISO GD**, the User Administrator:
  - has full visibility on all National committees managed by his Organization
  - can create National committees
  - can map National committees to ISO committees
  - can register and assign national users to National committees
- In **NTCLite** the User Administrator:
  - has viewing access to all National committees and ISO documents copied on the server
  - can set up automatic notifications
  - can define filters to exclude certain types of documents from the

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## 3 main roles in NTCLite



## Roles and Permissions

Application	Permissions	Roles		
		User Administrator	National committee Secretary & SST	National committee Member & Chairman
ISO GD	Setup National committees	✓	✗	✗
ISO GD	Register and assign users	✓	✗	✗
NTCLite server	Set document filters	✓	✓	✗
NTCLite server	Remove documents/folders	✗	✓	✗
NTCLite server	Set automatic notifications	✓	✓	✗
NTCLite server	Send document notifications	✗	✓	✗
NTCLite server	Change document/folder names	✗	✓	✗
NTCLite server	Edit National attributes	✗	✓	✗
NTCLite server	View international documents	✓	✓	✓

## How to create a National Committee in GD (3 steps)

**Step 1:** On the homepage, click on the Create New Committee



**Step 2:** Select the field of the committee (Technical, Policy development)

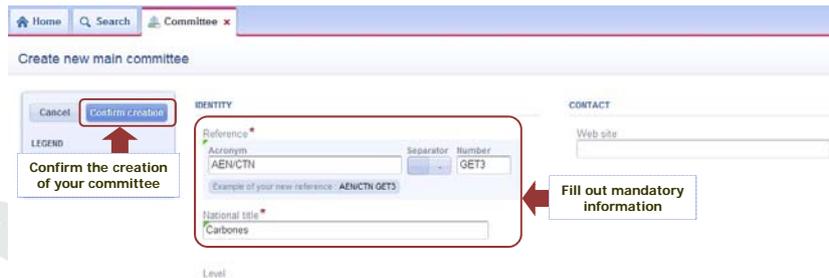
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## How to create a National Committee in GD (cont.)

**Step 3:** Enter the national committee details (full reference, title, ...) and confirm its creation

 *The acronym should never start with ISO, IEC, ISO/IEC, CEN, CENELEC, CEN/CLC or CEN-CENELEC*



 A newly created committee will be in the status **"in progress"**. You can modify any field in the newly created committee while in this status. Once a committee has been activated the committee's reference can no longer be modified.

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## How to create a National child committee (SC and WG)

A child committee must be created from the parent national committee

 **The child committee inherits of its parent reference**

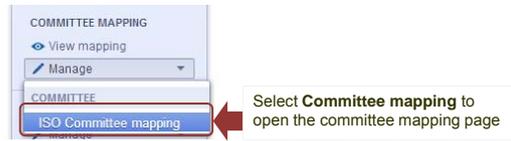


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## How to map a National Committee with an ISO Committee?

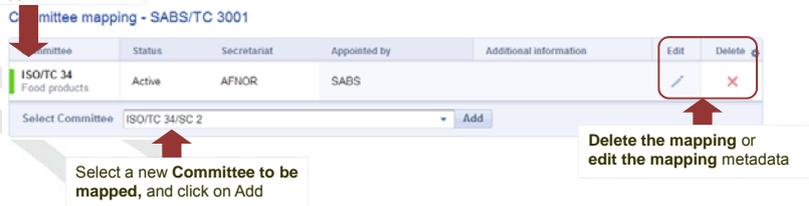
**Step 1:** Select Manage > ISO Committee Mapping from the menu



**Step 2:** Map ISO committees to the national committee

NSB must be P or O member to be able to mirror an ISO committee

List of mapped committees

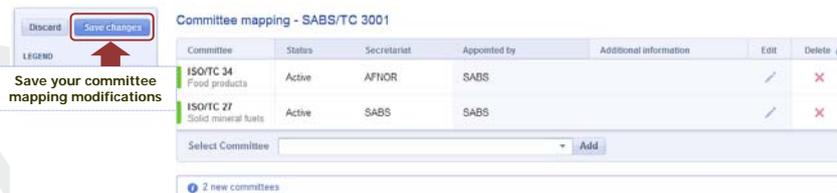
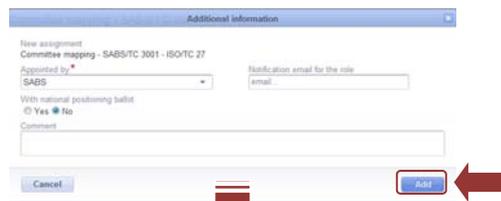


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## How to map a National Committee with an ISO Committee?

**Step 3:** Add any Additional information and save your modifications



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## Activate a newly created national committee

- A committee needs to be in the “Active” status in order to be visible for its committee members (This is new with GD3).

Click on Status Manage > Activate to activate the committee.

A committee that has not been activated has the summary banner hatched

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## How to edit and assign national person to a national committee?

**Step 1:** Select the role to edit in the Manage sub-menu.

Select the National role to edit in the Manage sub-menu.

Click Edit next to the role you wish to update

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## How to edit and assign members to a national committee

**Step 2:** Assign person(s) to the role and save your modifications

a) Click the Delete icon to remove an existing role.

Save your modifications

b) To add a new role, search for a person using the drop-down list. You can find a person, either using his name or account email address.

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## Matrix of roles – National role managed by the MBUA

Roles in GD	Roles definitions
National Secretary	Individual providing day-to-day management and administrative services for the work of a committee.
National Secretary Support team	Assistant(s) or support staff of the Secretary of a committee
National Chairperson	The chairman of a committee is responsible for the overall management of that committee, including any subcommittees and working groups.
National Committee member	Experts of the committees.
National Observer	Person entitled to follow the activity of a committee.

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## Demo and Exercises

### Demo:

- Create an National committee
- Map ISO Committees to the National and Assign users



### In Global Directory ...

**Exercise 30:** Create a National committee

**Exercise 31:** Map ISO committees to the National committee

**Exercise 32:** Assign users (national experts) as National members

**Exercise 33:** Search for your National committee using the Search feature in GD

**Training environment :** <https://training.iso.org>

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## National eCommittees Homepage

The screenshot shows the homepage for the UNI/TC 010 'Test' committee. The page is titled 'Committee UNI/TC 010 "Test"' and is powered by LiveLink. The date is Monday, 2013-03-25. The page is divided into several sections:

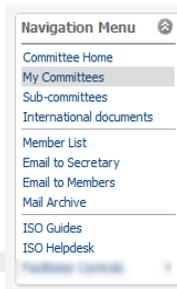
- LINKS:** A top right section with a 'Personal' menu (My Workspace, Favorites), an 'Enterprise' menu (Workspace, Users & Groups), a 'Tools' menu (Log-out, Settings), and a 'Help' menu (Contents, For This Page).
- NAVIGATION:** A left sidebar menu with options: Home, My C, Sub, Inter, Mem, Email, Mail, ISO Guides, ISO Helpdesk, and Facilitator Controls.
- LIBRARY:** A central section with a table listing documents. The table has columns for 'Type Name' and 'Size'. It shows two items: 'CEN Docum' (1 item) and 'ISO Docum' (1 item). A 'view more' link is present below the table.
- STRUCTURE:** A right section titled 'Structure' with a sub-section 'UNI/TC 010'.

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## Navigation Menu

- Easy access to National eCommittees modules and functions
- Role based visibility of menu items



Menu item	Comment
<b>Committee Home</b>	Link to the National committee homepage
<b>My Committees</b>	List of National committees to which you have access
<b>Sub-committees</b>	Link to the homepage of a National Sub-Committee
<b>International Documents</b>	ISO and/or CEN documents mirrored from the ISO and/or CEN committees
<b>Member List</b>	List of National committee members
<b>E-Mail to Secretary</b>	Opens an e-mail window to send an e-mail to the National committee secretary and the Secretary Support Team.
<b>E-Mail to Members</b>	Opens an e-mail window to send an e-mail to the National committee members (only available for Secretary and Secretary Support Team)
<b>Mail Archive</b>	Contains all Notifications sent to the National committee members
<b>ISO Guides</b>	Access to the user manuals
<b>ISO Helpdesk</b>	Link to contact the ISO Helpdesk

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## Member list

- List of all national Committee members by role
- Easy filtering and sorting
- Can be exported (CSV for excel) and printed
- Always up-to-date with the Global Directory

FIRST NAME	LAST NAME	E-MAIL	ROLE
Chairman	Sabs	chairman@sabs.co.za	Chairperson
Member	Sabs	member@sabs.co.za	Member
Secretary	Sabs	secretary@sabs.co.za	Secretary
Stt	Sabs	stt@sabs.co.za	Secretary Support Team

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## Structure

- Shows the entire committee structure with its sub-committees and working groups
- Easily identify how an SC is related to a Committee, what other WGs exist etc..

### You are here

Highlighted in blue is the National TC/SC/WG you are currently viewing



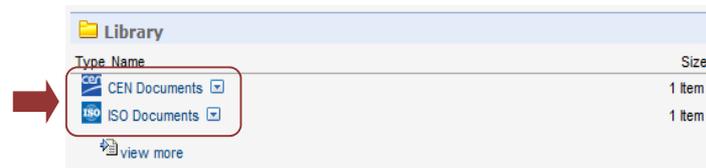
Type	Name
TC	National Committee B
SC	National Committee B SUB
WG	National Committee B SUB WG

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## Library – Access International Documents

- Provides access to the international documents by ISO or CEN committees that are mapped to the National committee



Type	Name	Size
CEN	CEN Documents	1 item
ISO	ISO Documents	1 item

[view more](#)



CEN Documents Folder is available for CEN Member Bodies only who have mapped the National committee to CEN committees in the Global Directory

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## Library – Access International Documents

The top screenshot shows the breadcrumb navigation path: UNI > Committee workspace > UNI/TC 010 "Test" > ISO Documents. A red box highlights the 'ISO Documents' folder. The table below shows one item: 'ISO/TC 209 "Cleanrooms and associated controlled environments"' with 5 items, last modified on 2013-03-22 09:33.

The bottom screenshot shows the breadcrumb navigation path: UNI > Committee workspace > UNI/TC 010 "Test" > Library > ISO Documents > ISO/TC 209 "Cleanrooms an...". A red box highlights the selected folder. The table below shows a list of sub-folders: '01. Public information' (2 items), '02. General committee documents' (1 item), '03. Meetings and resolutions' (1 item), '04. Projects' (0 items), and '08. Balloting and commenting' (2 items).

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## Assigning national attributes to International documents

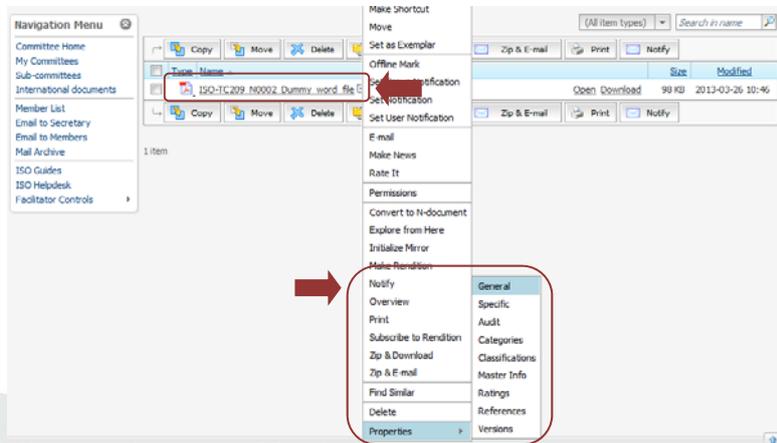
- The secretary/SST can assign national attributes to international documents
- The attributes can be added, modified and deleted
- In the Navigation Menu, click on the International documents menu item
- National attributes cannot be restored from deleted files

The navigation menu on the left has 'International documents' highlighted with a red box. The main table shows the following data:

Type	Originating TC	Int. Number	Name, Title	Int. Action	Int. Due Date	Document type	Document subtype	Print	Size	Date modified
ISO/TC 94	352	ISO/TC94_N0352_Meeting_registration_form	Meeting registration form	MEET	2011-04-20	Meeting	Other meeting document		200 KB	2011-02-03
ISO/TC 94	351	ISO/TC94_N0351_ISO/TC_94__notice_of_meeting_revised	ISO/TC 94 notice of meeting revised	MEET	2011-04-04	Meeting	Meeting announcement		423 KB	2011-02-03
ISO/TC 94	353	ISO/TC94_N0353_Meeting_registration_form_-_Word_document	Meeting registration form - Word document	MEET	2011-04-01	Meeting	Other meeting document		12 KB	12-03
ISO/TC 94	350	ISO/TC94_N0350_N350_list_of_hotels_in_Geneva_N350 list of hotels in Geneva	N350 list of hotels in Geneva	MEET	2011-04-01	Meeting	Other meeting document		358 KB	2011-01-19
ISO/TC 94	349	ISO/TC94_N0349_Chairmanship_of_ISO_TC_94_SC_6	Chairmanship of ISO TC 94 SC 6	COMM	2011-02-17	Other committee document	Other committee document		51 KB	2011-01-18

A red box highlights the row for document 353, and a red arrow points to the 'Date modified' column value '12-03'.

## Renaming International Documents and Folders



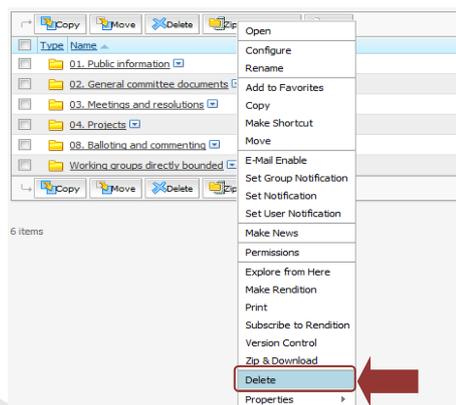
The changes you make on international document in the NTCLite server do not affect the original International documents on the ISOTC server

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## Deleting International Documents and Folders

International documents and folders can be deleted from the National committees



The changes you make on international document in the NTCLite server do not affect the original International documents on the ISOTC server

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## Restoring International Documents after Removal

The screenshot shows the ISO eServices interface. A context menu is open over a document, with 'List Deleted Mirrors' highlighted. A table below shows the restored document details:

Master Location	Master Object	deletion date
ISO/TC 034 "Food products" General committee documents	_N1278_New_Microsoft_Word_Document	2012-05-07 15:12

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## How to define filters to exclude ISO/CEN ballot documents

- The secretary/SST can define filters for its own committees
- The MBUA can define default filters for all committees
- The committee filters can override the default NSB filters

The screenshot shows the 'Define document filter settings' page. The page includes instructions on how to add or remove filters for NMC committees:

This page allows to define filters to exclude documents from the NMC service.  
By default all different types of documents (including all ballot documents) are included in the NMC document dissemination.  
By clicking the icons and below you can add or remove filters. To save your modifications please press **Save** at the bottom of the page.

**Active filter(s) for all NMC committees**  
exclude FIS documents

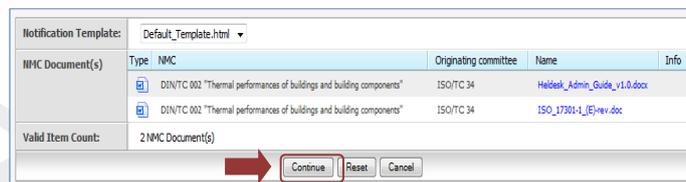
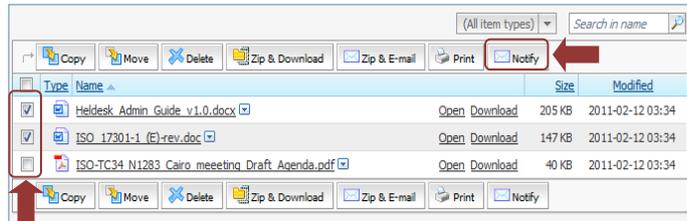
**Active filter(s) for specific NMC committees**  
exclude FIS documents  
exclude FIS documents  
exclude FIS documents

Add or remove documents filters by clicking on the **plus** or **minus** icons, then click the **Save** icon

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## Manual notification of International documents

- International documents can be notified manually by the secretary/SST

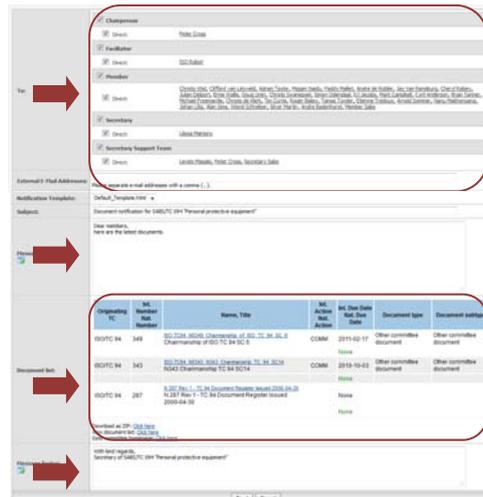


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## Manual notification of International documents

- Notification can be done by roles
- Customize your message
- Document list to be notified
- Customize your message footer



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## Demo and Exercises

### Demo

- Find an National eCommittee
- Open the international document list
- Exclude all DIS documents
- Delete and restore an international document



### In ISO NTCLite server ...

**Exercise 34:** Login to NTCLite server and access a National eCommittee

**Exercise 35:** View the ISO committees mapped to your National committee

**Exercise 36:** Open the international document list and add national attribute to a document

**Exercise 37:** Exclude all DIS documents

**Exercise 38:** Delete and restore an international document

**Exercise 39:** Manually notify documents to the national committee members

**Training environment :** <https://training.iso.org>

## 5. National Solutions

### 5.2 ISOLutions

**[isolutions@iso.org](mailto:isolutions@iso.org)**

## What is ISolutions?

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- ISolutions is a set of applications to support members performing **National, Regional and International** standardization work using IT solutions hosted through ISO



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## Why ISolutions?

---

Many ISO members share a common set of business processes including:

- Managing committees and peoples' participation in those committees
- Managing documents and working on them collaboratively
- Managing the lifecycle of national projects and standards
- Collecting comments and voting at multiple levels
- Doing this in an integrated manner at the international, regional and national level.

ISolutions offers effective IT applications to perform this work efficiently.

- More time available to meet customers and market needs

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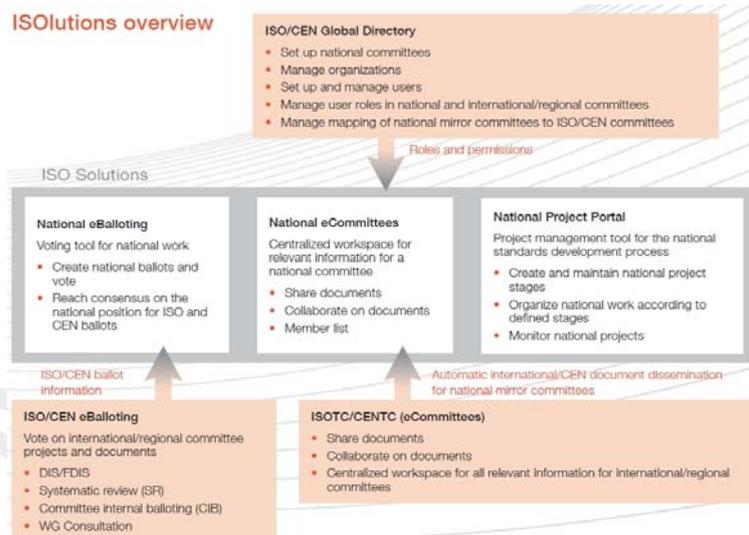
## Benefits of registering with ISolutions

- Members' staff and experts can use a **consistent, integrated set of tools** to make their work easier
- Members have **quicker access to good quality, evolving IT services** that meet their needs at a lower price than they could have achieved themselves
- Members can **focus on activities that truly differentiate them** from other organizations, or add value for their markets

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## ISolutions Overview



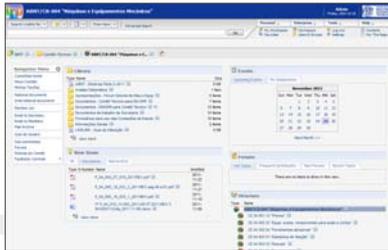
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## National eCommittees (NTC)

### Benefit:

Easier document dissemination to national experts



- Document management system
- Based on the same solutions as ISO and CEN (fast learning curve for national users already working at the ISO or CEN level)
- Single access point to national, regional and international documents
- Integration with ISO Global Directory allows the MBUAs to easily manage their national committees, experts, roles and mapping

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## Difference between NTC and NTCLite

	NTC	NTCLite
<b>National documents</b>		
Add national documents	✓	✗
N-numbering of national documents	✓	✗
PDF rendition of national documents	✓	✗
Document notifications (automatic and manual)	✓	✓
<b>International and Regional documents</b>		
Mirror documents from ISOTC/CENTC committees	✓	✓
Add documents from other Int'l Organizations (IEC, ...)	✓	✗
Rename mirrored ISO/CEN documents/folders	✓	✓
Filter mirrored ISO/CEN document types (DIS, FDIS, ...)	✓	✓
Delete/Restore mirrored ISO/CEN documents	✓	✓

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## Difference between NTC and NTCLite

	NTC	NTCLite
<b>Committee features</b>		
Manage national committees	✓	✗
Customized navigation menu	✓	✗
Committee homepage banner	✓	✗
Transversal roles (child, peer, parent)	✓	✗
Private committees	✓	✗
Anonymous access to committees	✓	✗
Committee Member List	✓	✗
New documents section	✓	✗
Discussion forums	✓	✗
License fee	✓	✗

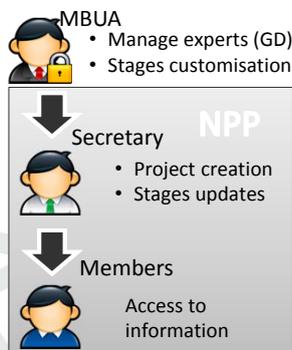
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## National Project Portal (NPP)

### Benefit:

Better project management through increased visibility on national standards development process and projects.



- Database system to manage the national standards development process
  - Record national project with metadata
  - Project stages customizable
  - Export full project list
  - Managed by the NSB (Secretaries and MBUAs)
  - Permissions driven by the ISO/GD

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## National eBalloting (NEB)

### Benefit:

Simpler consensus building, better voting performance, increased efficiency

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



### 1. National Committee Internal Ballot (NCIB)

**Aim:** Voting on national standards

### 2. National Positioning Ballot (NPOS)

**Aim:** Gaining national consensus before voting on an international or regional standard.

It provides information about ISO and/or CEN ballots relevant to each national committee.

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## My role as User Administrator in ISOlutions

### ➤ Manage (create/update/delete) in ISO Global Directory

- National experts and their roles
- National committees
- Mappings between national and ISO committees for automatic ISO documents dissemination
- Mappings between national and CEN committees for automatic CEN documents dissemination (those mappings are managed in CEN Global Directory)

### ➤ Manage manually in National eCommittees

- Mappings between national and other international committees for manual dissemination (i.e. IEC documents)
- Mappings between national and regional committees for manual dissemination (i.e. COPANT documents)

### ➤ Support for the national committee users (National Helpdesk)



*ISO recommend that the Member should have at least 2-3 User Administrators (not full-time, the number will be depending on the numbers of national users and committees)*



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## More information?

### What is the implementation Time?

- May vary case by case
- Usually takes between 5 and 20 days work on NSB's side
- A test environment can be provided more quickly.

### Where could I find more information about ISOLutions?

- <https://connect.iso.org/x/KYA4>

or you can contact us at [isolutions@iso.org](mailto:isolutions@iso.org)

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## Timeline

### Day 1

1. Introduction
  - 1.1 ISO Members
  - 1.2 Standards Development
  - 1.3 ISO Online & ISODOC
  - 1.4 ISO Systems Overview
  - 1.5 Single Sign-One (SSO)
2. Global Directory & Event Notifications
  - 2.1 Global Directory

### Day 2

2. Global Directory & Event Notifications
  - 2.1 Global Directory – Continue
  - 2.2 Event Notifications
3. ISO eServices Applications
  - 3.1 ISO eCommittees
  - 3.2 ISO Meeting Management
  - 3.3 ISO Project Portal
  - 3.4 ISO eBalloting

### Day 2 - Continue

4. Access to International Standards
  - 4.1 ISOSTD & ISO Online

### Day 3

5. National Solutions
  - 5.1 NTCLite: National eCommittees Lite
  - 5.2 ISOLutions
6. My role as User Administrator - Summary
7. Online Meetings
  - 7.1 WebEx
8. ISO Connect
9. Support, Helpdesk and Conclusion

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## 6. My role as User Administrator... Summary



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## My role as User Administrator... Quiz

ISO Applications	User Administrator roles
Global Directory	?
Event Notifications	?
eCommittees (ISOTC)	?
Meeting Management	?
Project Portal	?
eBalloting	?
ISOSTD / STADIST /ISODOC	?
ISOlutions	?



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ISO Applications	User Administrator roles
<b>Global Directory</b>	<ul style="list-style-type: none"> <li>➤ Responsible to Manage experts and their roles for my NSB</li> <li>➤ Responsible to create/manage National Committees</li> </ul>
<b>Event Notifications</b>	<ul style="list-style-type: none"> <li>➤ Monitor changes made to users administered by my NSB</li> <li>➤ Take action if you see any mistakes</li> </ul>
<b>eCommittees (ISOTC)</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>Meeting Management</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>Project Portal</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>eBalloting</b>	None <ul style="list-style-type: none"> <li>➤ Indirect role: Give access to users via GD</li> </ul>
<b>ISOSTD / STADIST / ISODOC</b>	None
<b>ISOlutions (national solutions)</b>	<ul style="list-style-type: none"> <li>➤ Manage national experts and their roles, national organizations, national committees, ISO/CEN mappings in GD</li> <li>➤ Manage documents of other regional (i.e. COPANT) and international organizations (i.e. IEC) manually in eCommittees</li> <li>➤ Support for national committee users (National Helpdesk)</li> </ul>

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## 7. Online Meetings

### 7.1 Webex

**<https://iso-meetings.webex.com>**

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## What is WebEx ?

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### Allows you to organize meetings via Internet (online)

- ISO's web conferencing software is provided by Cisco WebEx
- This service is offered free of charge to ISO's members, technical committees and subcommittees, working groups, and experts for **any ISO-related work**
- A free WebEx account is offered free of charge to developing countries for **National Work**
  - Each NSB has a generic account that anybody can use to organise a meeting



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## Do I need an account to WebEx?

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### If you participate at a web meeting:

**NO:** You don't need an account to WebEx to participate in a meeting

### If you organize a web meeting:

**YES:** You do need an account to WebEx to schedule and conduct a meeting

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## 7. Online Meetings

### How do I participate to a meeting?

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### How to join a WebEx meeting as participant?

To join the meeting click on the hyperlink in your invitation email



- If you don't have a WebEx enter your name and email address
- If you have an account you will be asked to login



## How do I set the audio for the meeting?

When joining the meeting, you will be asked to choose your Audio Conferencing option



### If you are using a telephone:

1. Select "Call me at a new number"
2. Click on the flag icon and select your country
3. Enter your telephone number without your country code, then click the "Call Me" button.

Please enter your regional code

You may also select the "I will call in" option and dial.

### If you are using a computer headset:

1. Click "Use Computer for Audio"
2. Click on the "Call Using Computer" button.

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## Few Guidelines for Participants...

If you are using your computer for the meeting audio you may be able to improve poor sound quality by:

- Turning off your video picture
- Turning off the video picture being sent to you by others.



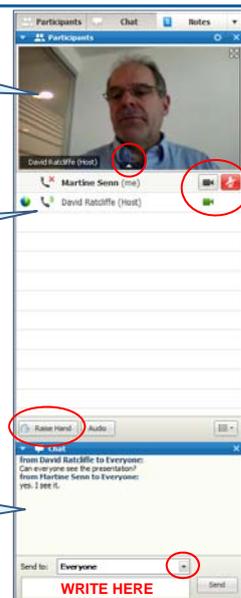
If you are not already muted by the organiser, please mute yourself in WebEx after joining the meeting using the microphone button.



To make a comment or ask a question for everyone to hear or see:

- To speak, please use the **Raise Hand** button.
- To write, please use **Chat** to all participants.

You can also use Chat to contact the meeting hosts or other participants directly.



## Best Practices for participants

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- **Minimize distractions in your meeting area.** For example:
  - close your office door if you have one
  - close or minimize unused applications on your computer
  - switch off any devices that may beep or ring during your meeting
  
- **Refrain from using your telephone in speaker mode**
  
- **Consider muting yourself when not speaking**
  
- If you use your webcam for video conferencing, try to have a **"clean" background**

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## 7. Online Meetings

How do I organise an online meeting?

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## Do I need an account to WebEx?

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### If you participate at a web meeting:

**NO:** You don't need an account to WebEx to participate in a meeting

### If you organize a web meeting:

**YES:** You do need an account to WebEx to schedule and conduct a meeting

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## How do I request an account to WebEx?

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1. Send an e-mail to [webconferencing@iso.org](mailto:webconferencing@iso.org)

2. You will receive 2 emails:

- 1st email to **complete the setup of your account**



*Click on the link provided in the e-mail to complete the setup of your account*

- 2<sup>nd</sup> email to **confirm your registration** with links to supporting materials

You can now access the WebEx application for ISO at:

**<https://iso-meetings.webex.com>**

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## How do I create an ISO web meeting?

**STEP 1:** Login to <https://iso-meetings.webex.com>

**STEP 2:** Click on **Schedule a Meeting** on Host a Meeting menu

Meeting Center My WebEx Log Out

Select Language

My WebEx Meetings Welcome, Julie Suter

Go to My Personal Meeting Room Start a One-Click Meeting

Attend a Meeting  
Browse Meetings  
Unlisted Meeting  
Register

Host a Meeting  
Schedule a Meeting  
My Meetings  
One-Click Meeting  
My Recorded Meetings

Set Up  
Support

English · Amsterdam Time

17. February 2012

The meetings you host Show past meetings

Time	Topic	Type
No meetings are either scheduled or in progress.		

Requests Pending Requests Approved Requests Rejected

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## How do I create an ISO web meeting?

**STEP 3:** Enter the **Meeting topic** and **Attendees**

\* Meeting topic: Test for eServices for MBUA ↑ Required field

Password:  Confirm password:

Date: 17 February 2012

Time: 15:30 Amsterdam Time

Duration: 1 hr 0 min

Attendees: helpdesk@iso.org; tcsupport@iso.org [Use address book...](#)

Send a copy of the invitation email to me

- Enter the email of each attendee separated by a semi-column «;»
- Tick «Send a copy of...» to receive a copy of the invitation
- Password is only used if you wish that your participants enter a password to join the meeting



## How do I create an ISO web meeting?

### STEP 4: START NOW or SCHEDULE MEETING

**Schedule a Meeting** Set options using template: [Meeting Center Default]

To set advanced meeting options or to schedule a Personal Conference meeting, go to [Advanced Scheduler](#)

Meeting topic: Test for eServices for MBUA \* Required field

Password:  Confirm password:

Date: 17 February 2012  
Time: 15:30 [Amsterdam Time](#)

Duration: 1 hr 0 min

Attendees: helpdesk@iso.org;csupport@iso.org [Use address book...](#)

Send a copy of the invitation email to me

Audio conference: WebEx Audio [Change audio conference...](#)

Cancel Save as template **START NOW**

Click on **START NOW**

Or

Change the date, time and duration of the meeting and click on **SCHEDULE MEETING**

**An automatic email with a link to start your meeting will be sent to you and your participants**

**Schedule a Meeting** Set options using template: [Meeting Center Default]

To set advanced meeting options or to schedule a Personal Conference meeting, go to [Advanced Scheduler](#)

Meeting topic: Test for eServices for MBUA \* Required field

Password:  Confirm password:

Date: 20 February 2012  
Time: 15:30 [Amsterdam Time](#)

Duration: 1 hr 0 min

Attendees: helpdesk@iso.org;csupport@iso.org [Use address book...](#)

Send a copy of the invitation email to me

Audio conference: WebEx Audio [Change audio conference...](#)

Cancel Save as template **SCHEDULE MEETING**

## How do I start the meeting?

- Click on the meeting hyperlink in your invitation e-mail



You may be required to log into your account when the meeting launches

You are the host for this online meeting.

Host Key: 967499 (use this to reclaim host privileges)

To invite others to join, copy and paste everything below into your invitation.

Meeting information

Topic: Getting started with Webex  
Date: Tuesday, February 21, 2012  
Time: 9:00 am, Europe Time (Paris, GMT+01:00)  
Meeting Number: 956 528 428  
Meeting Password: (This meeting does not require a password.)

To start or join the online meeting

Go to <https://iso-meetings.webex.com/iso-meetings/j.php?ED=4859392&UID=284252&RT=MjMyMw%3D%3D>



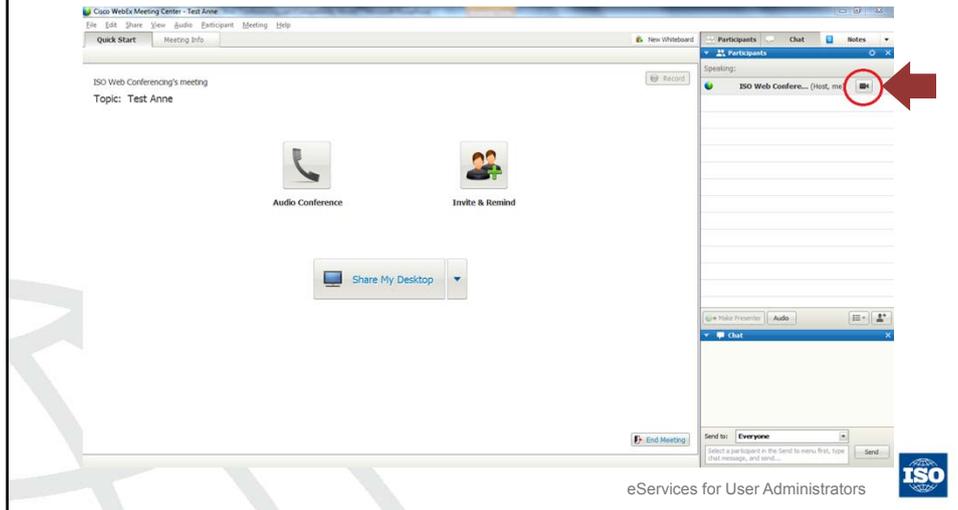
This link is only valid for one meeting

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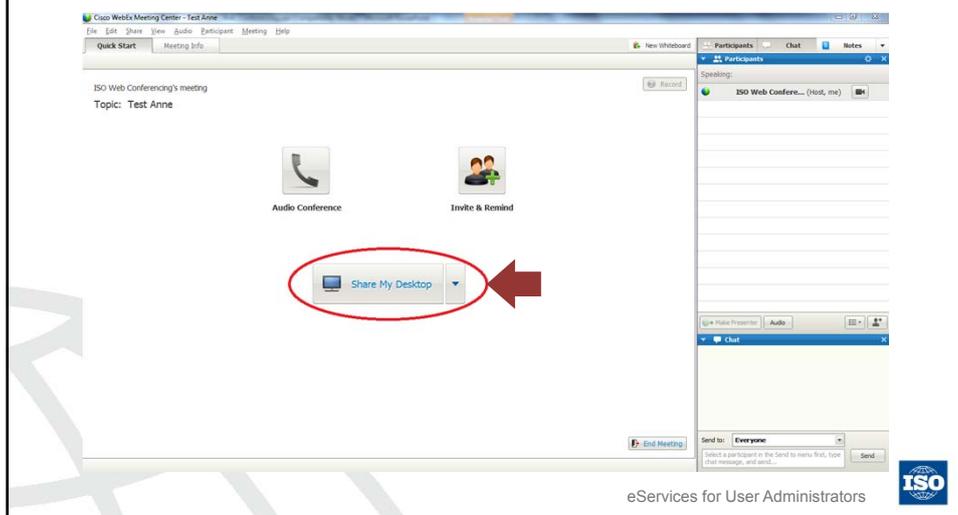
## How do I activate the webcam?

- Click on the camera icon next to your name in the participant list to activate your webcam



## How do I share my Desktop?

- Click the "Share My Desktop" button to share your whole screen, or click on the down arrow to share an application



## During your meeting: WebEX control panel



➤ The control panel allows you to:

- Change your audio connection (e.g. switch from headset to telephone),
- Mute or unmute yourself
- See a list of meeting participants
- Send text messages to meeting participants
- or perform other operations.



*Many of these are toggle buttons. That is, to show the list of participants, click on the participants button. To hide the list, click on the participants button again*

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## Ending a Web Meeting

To end the web meeting:

1. Click on the "Stop Sharing" button in the Webex control panel
2. Select the "File" menu and
3. Select "End Meeting".



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## 10 Best Practices for presenters

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1. Be familiar with systems. Practice before making your first presentation
2. Start your web meeting a few minutes early so you can greet participants
3. Speak clearly and slowly during your presentation
4. Engage your audience by asking direct questions
5. Realize that participants are watching what is on your screen
6. Consider appointing another person to answer chat messages or monitor the participant list during the meeting
7. If possible, you may wish to use a second monitor to view Webex controls, so your on-screen presentation remains clean
8. If hosting a large meeting (6 or more), ask others to mute their audio devices when they're not speaking to keep background noise to a minimum
9. Be mindful of time zone differences when scheduling meetings
10. Schedule short breaks every 90 minutes

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## How can I practice before organizing my first meeting?

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- TEST your **computer's ability** to join a web meeting (<http://www.webex.com/test-meeting.html>)



*This test may install required WebEx plugins on your computer.*

- TEST your **headset and/or webcam** on your computer
- SCHEDULE a **practice meeting** with a willing participant to help you become more familiar with the software.



*Always send a copy of your meeting invitation to yourself*

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## WebEx User Guides

- To access to the WebEx User Guides, login to your account and select « User Guides » in the « Support » section

ISO International Organization for Standardization International Standards for Business, Government and Society

Meeting Center My WebEx Log Out

### Meeting Center: User Guides

Select Language

- Attend a Meeting
  - Browse Meetings
  - Unlisted Meeting
  - Register
- Host a Meeting
  - Schedule a Meeting
  - My Meetings
  - One-Click Meeting
  - My Recorded Meetings
- Set Up
  - Support**
    - MyResources
    - User Guides**
    - Downloads
    - Training
    - Contact Us

#### Starting, Managing, and Attending Meetings

<b>Meeting Center User's Guide</b> Detailed instructions for scheduling, managing, and attending meetings, sharing documents and applications, and so on.	PDF HTML
<b>Successful WebEx Meetings</b> Tips and techniques for effectively managing meetings.	PDF
<b>Getting Started with WebEx Universal Communications Toolkit</b> Instructions for installing the WebEx Universal Communications Toolkit so that you can create and use multimedia slide presentations in meetings.	PDF
<b>Presenting Online to People Who are Blind or Visually Impaired</b> Provides tips and techniques for presenting to people who are blind or visually impaired.	PDF
<b>Scheduling a Closed Captionist for Your Meeting</b> Instructions for setting up closed captioning for hearing-impaired participants.	PDF

#### About Meeting Center

Version: Meeting Center 8.5 (WBS 27)  
Page build: 27.25.8.13642  
Client build: 27.25.0.10481  
Docs build: 27.25.0.1

#### Release Notes and FAQs

**Release Notes**  
Describes new features, known issues, and system requirements. [HTML](#)

**FAQs**  
Provides answers to the most frequently-asked questions about Meeting Center. [HTML](#)

#### Feedback

We appreciate your feedback. Please [contact us](#) with any comments about our documentation.

Internet | Protected Mode: Off 100%

## Support

- For issues that are specific to ISO (account requests, policy matters, user feedback, etc...), contact [webconferencing@iso.org](mailto:webconferencing@iso.org)
- WebEx technical support can be found here:  
<http://support.webex.com/support/phone-numbers.html>  
Support line using toll-free number is available 24 hours/day, 7 days/week, and **WebEx will not charge you for this service**
- You are welcome to consult our internal documentation on ISO Connect:  
<https://connect.iso.org/x/IQBU>

Timeline

<div style="background-color: #d3d3d3; padding: 5px; font-weight: bold; margin-bottom: 5px;">Day 1</div> <ol style="list-style-type: none"> <li>1. Introduction               <ol style="list-style-type: none"> <li>1.1 ISO Members</li> <li>1.2 Standards Development</li> <li>1.3 ISO Online &amp; ISODOC</li> <li>1.4 ISO Systems Overview</li> <li>1.5 Single Sign-One (SSO)</li> </ol> </li> <li>2. Global Directory &amp; Event Notifications               <ol style="list-style-type: none"> <li>2.1 Global Directory</li> </ol> </li> </ol>	<div style="background-color: #d3d3d3; padding: 5px; font-weight: bold; margin-bottom: 5px;">Day 2 - Continue</div> <ol style="list-style-type: none"> <li>4. Access to International Standards               <ol style="list-style-type: none"> <li>4.1 ISOSTD &amp; ISO Online</li> </ol> </li> </ol>
<div style="background-color: #d3d3d3; padding: 5px; font-weight: bold; margin-bottom: 5px;">Day 2</div> <ol style="list-style-type: none"> <li>2. Global Directory &amp; Event Notifications               <ol style="list-style-type: none"> <li>2.1 Global Directory – Continue</li> <li>2.2 Event Notifications</li> </ol> </li> <li>3. ISO eServices Applications               <ol style="list-style-type: none"> <li>3.1 ISO eCommittees</li> <li>3.2 ISO Meeting Management</li> <li>3.3 ISO Project Portal</li> <li>3.4 ISO eBalloting</li> </ol> </li> </ol>	<div style="background-color: #d3d3d3; padding: 5px; font-weight: bold; margin-bottom: 5px;">Day 3</div> <ol style="list-style-type: none"> <li>5. National Solutions               <ol style="list-style-type: none"> <li>5.1 NTCLite: National eCommittees Lite</li> <li>5.2 ISOLutions</li> </ol> </li> <li>6. My role as User Administrator - Summary</li> <li>7. Online Meetings               <ol style="list-style-type: none"> <li>7.1 WebEx</li> </ol> </li> <li><b>8. ISO Connect</b></li> <li><b>9. Support, Helpdesk and Conclusion</b></li> </ol>

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8. ISO Connect

<https://connect.iso.org>

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## What is ISO Connect?

- ✓ ISO Connect is a new service to find out about the latest news, events, projects and get involved!
- ✓ Many areas (like IT and eServices, Marketing and Communication, Conformity Assessment etc) are already live, more topics like Intellectual Property are coming soon
- ✓ Subscribe and receive updates to topics you're interested in per email, join the discussion and be heard!

<https://connect.iso.org>

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## Why use ISO Connect?

- ✓ With the ever increasing number of sources for information, ISO Connect provides an easy way to get the information you're interested in.
- ✓ ISO Connect uses modern technology that enables you to subscribe to only the topics you're interested in, or to the whole site
- ✓ Email notification will ensure you're informed of what's happening, when it happens, so you'll never miss an important communication from the ISO Central Secretariat again
- ✓ We're looking for feedback on this new tool to assess whether this could become an even more central communication platform between the ISO/CS and ISO Members

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## ISO Connect homepage

The screenshot shows the ISO Connect homepage with several key features highlighted by red boxes and arrows:

- Search:** A search bar at the top right with the text "Search the full ISO Connect".
- Connect to...:** A sidebar menu on the left with categories: IT and eServices, Marketing and Communication, Conformity Assessment, Development and Training, Intellectual Property, Changes to ISO Services, and Projects. A callout box says "Connect to.. The different areas of interest".
- Projects:** A section below "Connect to..." titled "Projects" with a "Summary of all Projects" and a list of projects including XML Programms, Global Directory 3, ISO Solutions - Phase 2, Living Lab, IT & eServices Training and ICTDEV support, and IT SITE - TMO Task Force on Seamless IT Environment. A callout box says "Projects Quick link to the most popular projects and list of all projects".
- News and Announcements:** A main content area on the right with two news items: "New Global Directory is coming soon" and "A new version of Developing Talent is now available". A callout box says "News and Announcements Quick access to the latest news".

At the bottom right, there is a logo for "eServices for User Administrators" and the ISO logo.

## Keep informed of news and updates

The screenshot shows a Confluence page titled "Simpler, Faster, Better IT environment for standards development" with annotations for user interaction:

- Watch:** A red box highlights the "Watch" button in the top right corner of the page content area. A callout box says "Watch Watch pages you're interested in to get email notifications of updates and changes".
- Comment:** A red box highlights the "3 Comments" section at the bottom of the page, showing a list of user comments. A callout box says "Comment Comment on a topic to share your ideas and discuss with other users directly on the page".

The page content includes a header with navigation links, a main heading, and a paragraph of text about the new version of the Global Directory. At the bottom, there is a logo for "eServices for User Administrators" and the ISO logo.

## Recommended notification settings

We recommend to watch the following two pages:

- Current Projects Summary
- Changes to ISO Services

The image shows two screenshots from the ISO Connect user interface. The top screenshot is titled 'Current Projects Summary' and displays a table with columns for 'Programme or project', 'Expected results', 'Overall HEALTH', 'Current Status', 'Project Manager', 'Start date', and 'Forecast end date'. The bottom screenshot is titled 'Changes to ISO Services' and shows a table with columns for 'Current Changes', 'Summary', 'Status', and 'Contact'. Both screenshots include navigation links and detailed information about various ISO projects and service updates.

Choose your preferred frequency of notification through your personal settings:

This screenshot shows the 'Changes to ISO Services' page with a user menu dropdown open. The 'Personal' option is highlighted with a red box and a red arrow pointing to it. The dropdown menu includes options like 'Update Status', 'Create Personal Space', 'Recently Viewed', 'Profile', 'Network', 'Status Updates', 'Favourites', 'Watches', 'Profile', and 'Log Out'. The text 'eServices for User Administrators' and the ISO logo are visible at the bottom right.

## How do ISO Online, ISOTC and ISO Connect fit together?



## How do I sign up for ISO Connect?

- ISO Connect is open to anyone with a Global Directory account (But, don't worry, if you haven't got one we'll still give you access !)
- We welcome any feedback on the capabilities and the content of ISO Connect

### **To Sign up:**

1. Sign on using your ISO Global Directory account/password if you have one
  - *(Note: for people who don't have a GD account, please register using your email address; we'll then create a new account for you to use and send you the details within a business day or so.)*
2. Please set up your profile so you get email notifications of blog posts which are used for the News and Announcements. To do this, go to your profile, settings, email, press the edit button and check the appropriate box.

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## **9. Support and Helpdesk Services**

**[www.iso.org/tc](http://www.iso.org/tc)**

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## User support: ISO Online Standards development resource area

[www.iso.org/eServices](http://www.iso.org/eServices)

Scroll down for Link to IT tools

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## User support: ISO Online

[www.iso.org/e-guides](http://www.iso.org/e-guides)

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## Help contact points

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- [helpdesk@iso.org](mailto:helpdesk@iso.org) IT Tools, eServices support
- [tcsupport@iso.org](mailto:tcsupport@iso.org) Update of official role in Global Directory Meeting organization
- [directives@iso.org](mailto:directives@iso.org) ISO/IEC Directives support
- [training@iso.org](mailto:training@iso.org) Training requests
- [webconferencing@iso.org](mailto:webconferencing@iso.org) WebEx account requests

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## Review of Objectives/Expectations

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*Your expectations  
for the training*

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## **Feedback form**

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Please fill out the feedback form!



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**Thank you for your attention!**

**Questions?**

[helpdesk@iso.org](mailto:helpdesk@iso.org)

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