CEN Documents

Chunk 1 Kick-Off for Secretaries, Convenors and support teams - 2 march 2021

Marc Bellier, EDP Consultant

Agenda

Project goal

Replace CEN eCommittees ensuring integrity and traceability of documents

Streamline User Experience by

➢ simplifying the search, access and management of content
➢ providing a modern, coherent User Interface
➢ offering a harmonized environment between CEN and ISO
➢ reinforcing integration -> other CEN services

1. Planning

Project update (ISO)

Selection of the New environment (2019) :

    NUXEO will replace Opentext Content Server (LiveLink)

Design phase :

    User-centric approach with a user group (CMs and experts)

ISO Pilot (Jan.-Aug. 2020) :

    ~ 500 committees using ISO Documents and sharing their feedback.

ISO On-Boarding (Q3/Q4 2020) **:**

    All ISO committees migrated in 3 chunks :

    September, October and November 2020

Project update (CEN)

Guiding Principle :

- Align software as much as possible on ISO version

- (Shared servers with 2 tenants, shared code base, shared interface,…)

CEN version Analysis and Testing   (Q3/Q4 2020)

- CEN Documents version tested and integrated with ISO environment

- CEN specifics mostly handled in configuration parameters

CEN Pilot (Jan-Feb. 2021)

- 2021-01-19 : Pilot Launched

- 2021-02-15 → 26 : Feedback analysis + Bug corrections …

Planning : On-boarding in 3 Chunks

CEN Committee On-Boarding   (~ 2060 Groups in Three Chunks)

- 2021-02-02 : ISO, DIN and AFNOR confirmed feasibility in accordance with timing
- 2021-02-08 : Chunk list sent to all CEN TC Secretaries
- 2021-02-18 : Deadline for possible chunk change requests

Chunk 1 : *673 (162 TC, 8 SC, 503 WG)* → 551 (123 TCs, 7 SCs, 423 WGs)

- 2021-03-02 : Kick-Off Webinar
- 2021-03-09 : Launch Date ➜ Document Freeze !

Chunk 2 : *628 (~ 114 TCs, 8 SCs, 506 WGs)* →

- *2021-03-22/23* : Kick-Off Webinar
- 2021-03-30 : Launch Date ➜ Document Freeze !

Chunk 3 : *742 (~ 152 TCs, 44 SCs, 546 WGs)* →

- *2021-04-22/27* : Kick-Off Webinar
- 2021-05-04 : Launch Date ➜ Document Freeze !

2. General Information

Document migration

We intend to migrate full TC structures with all underlying SC and WG

All committee/working group documents <u>migrated</u> in a chunk will be found in CEN Documents

Documents of <u>Non-migrated</u> group (= following chunks) will still have to be accessed via eCommittees
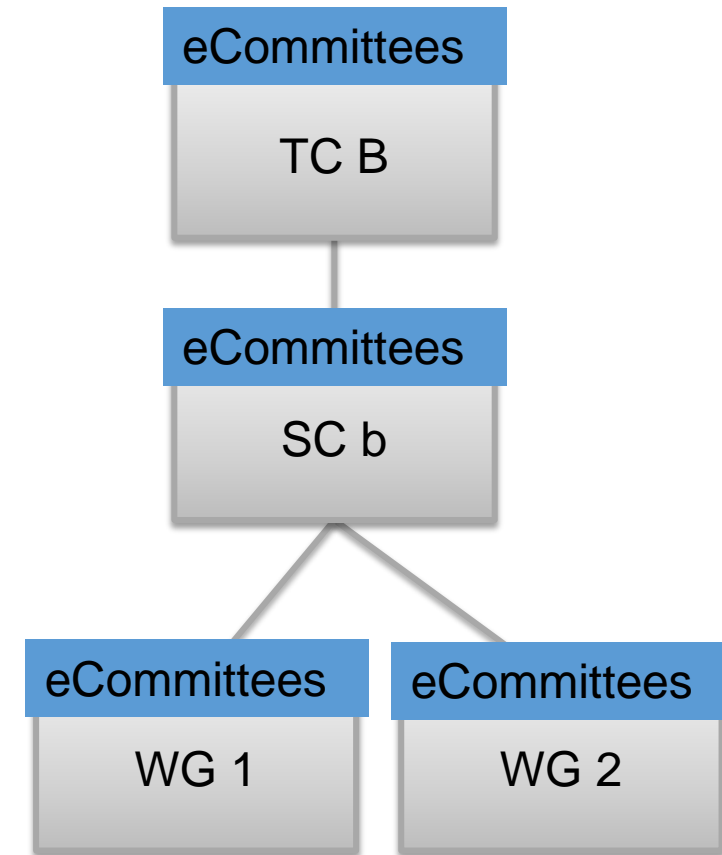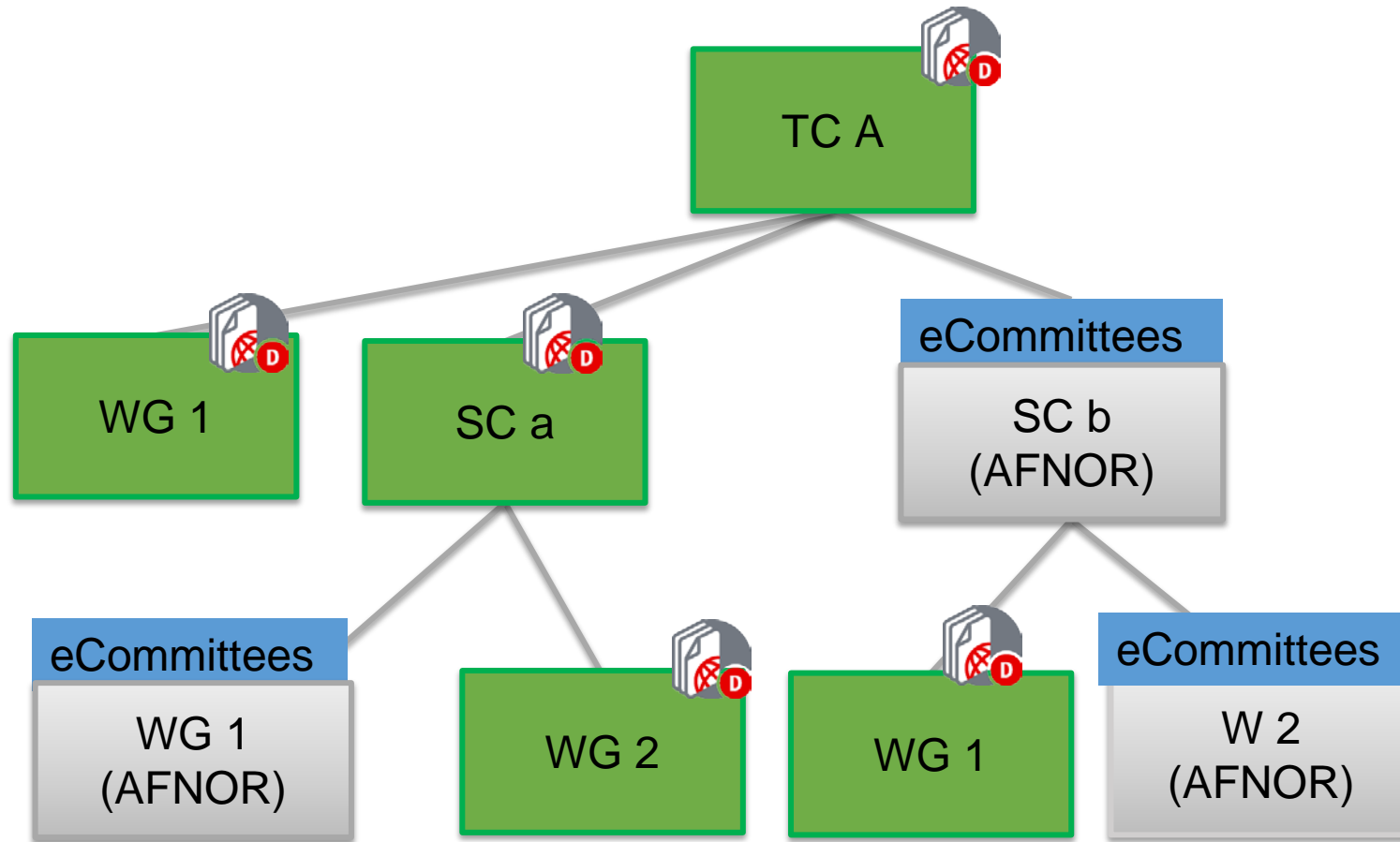
Initial Plan :
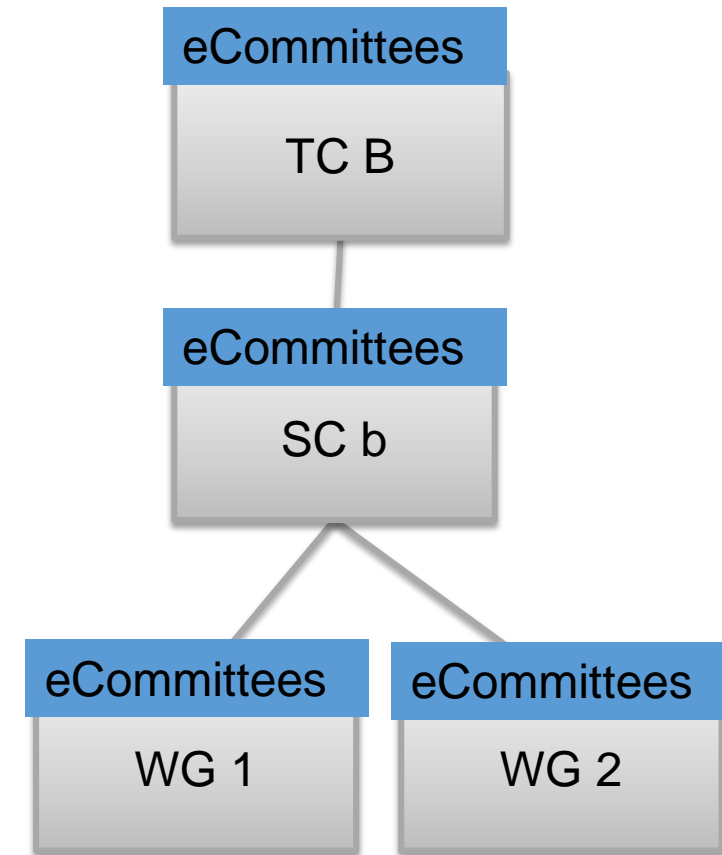*Chunk 1 Structures*
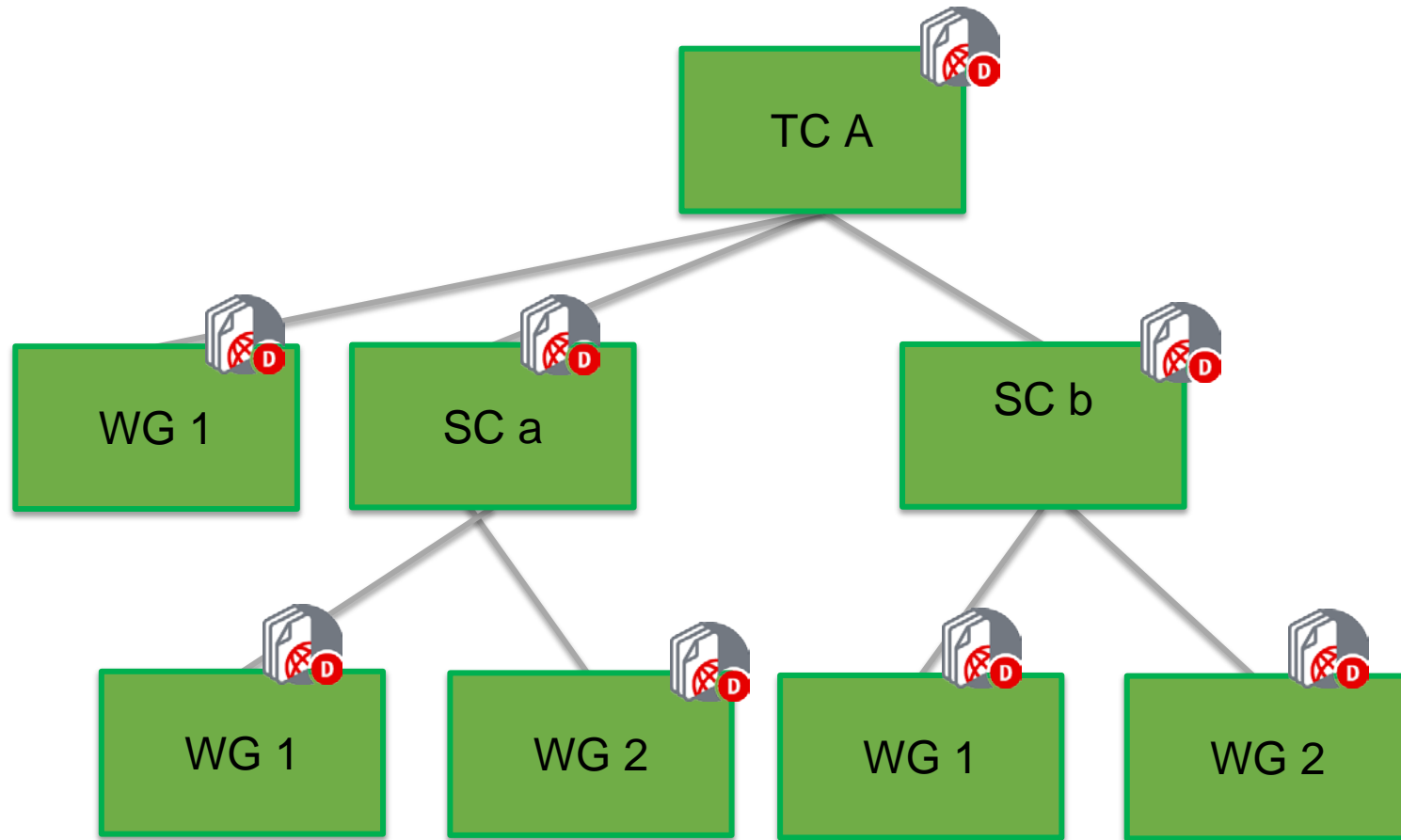
Other Committees
(Chunks 2 and 3)

Reality :
Chunk 1 Structures

Other Committees
(Chunks 2 and 3)

Reality :
Chunk 1 Structures
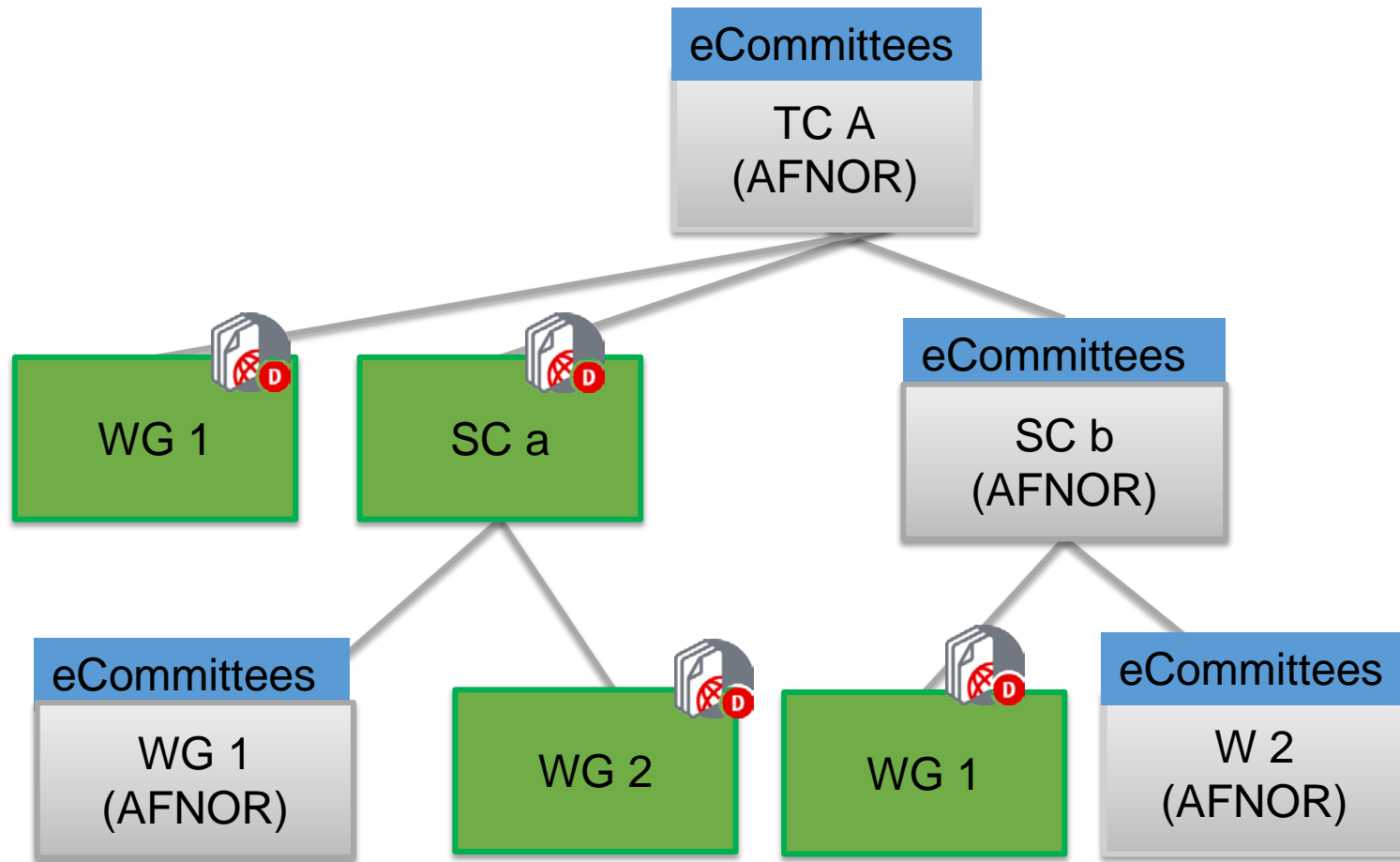
Other Committees
(Chunks 2 and 3)
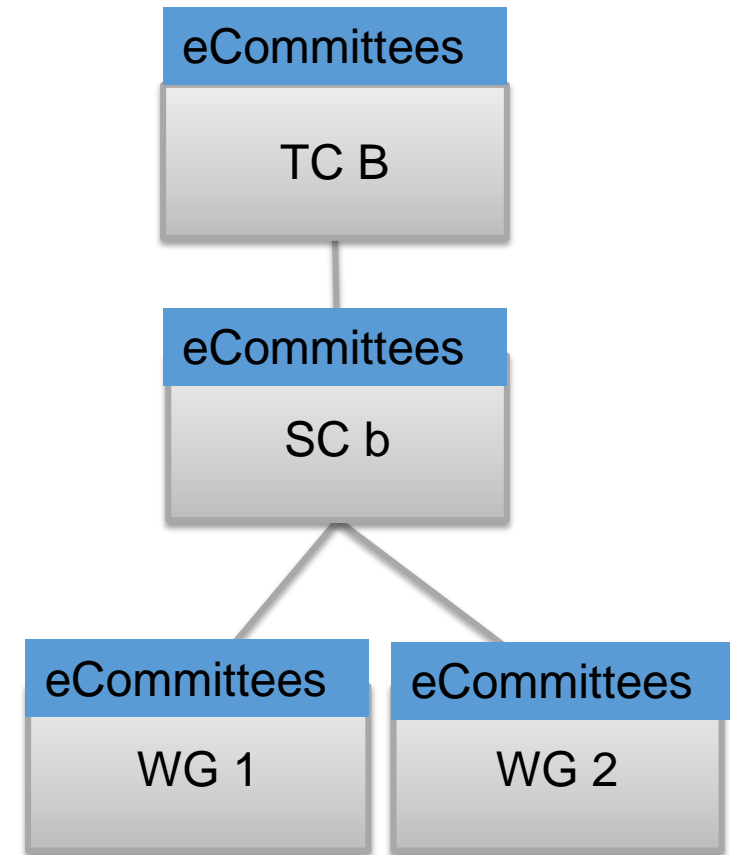
Library folders : Cen Docs ← eCommittees

	Title ↑	Modified ↑
📁	Administration (restricted)	2019-12-05
📁	General	2019-12-05
📁	Meetings	2019-12-05
📁	Resolutions	2019-12-05
📁	Projects	2019-12-05
📁	Member upload area	2019-12-05
📁	Mail archive	2019-12-05

CEN Documents	eCommittees
Administration (restricted)	00. Secretariat workspace
General	02. General committee documents
Meetings	03. Meetings
Decisions	*NEW (not in WGs)*
Projects	04. Projects
Member upload area	05. Drop-in box for members
Mail archive	*NEW*

What content to expect ?

- ✓ All documents and N-documents and all subfolders

    - ✓ N-Docs : Regardless of Status (Uploaded, Notified, Reserved, …)
    - ○ DIN hosted Committees : Only Notified N-Docs
      - ➔ Notify before Migration !

- ✓ All mail archive (email to members) and N-document notifications

- ○ *Public documents (folder 01)* : these documents will be migrated to Subfolder '*Reference Documents*' under '*Administration*' (*difference with ISO*)

- ☒ Other object types (shortcuts, URLs, forum threads and messages etc…) will not be migrated

Other considerations :

Internet Explorer NOT supported
→ Use Chrome, Firefox, Edge, …
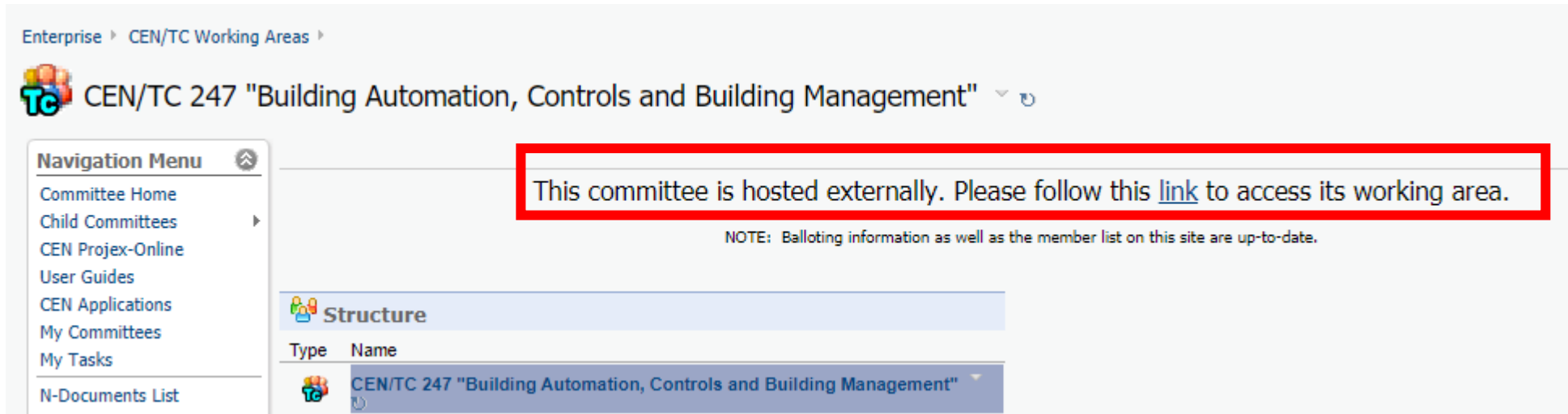
Committees currently hosted at AFNOR & DIN
will now be managed within CEN Documents

3. Access

Access :

- Direct Link : https://sd.cen.eu/documents/ui/#!/home

- During Chunk 1 and Chunk 2, the CEN Application Portal still points to the Content Server. CEN documents can be accessed via the home page of the Committee in **eCommittees** :

- When all Committees are migrated to '**CEN Documents**', CEN Application Portal will be updated and point to the new environment.

Who has Access ?

➢ same rules as in eCommittees :

✓ Manager roles [R/W] : Secretaries, Convenors, Support Teams, …

✓ Contributor roles [R] : Committee Members, Chairpersons, Observers, Document Monitors, Program Managers, Consultants, Liaison Representatives

○ Officer Roles (indirect Access) [R] : Secretaries, Convenors, Support teams of the other bodies in your TC structure

4. Navigation

Dashboard

Committees you defined as Favorites

☆ My favorite committees

& My committees

Title	Scope
CEN/TC 247 "Building Automation, Controls and Buildi...	CEN
CEN/TC 247/WG 6 "Electronic co...	
CEN/TC 254 "Flexible sheets for waterproofing"	CEN
CEN/TC 254/WG 1 "Coordination"	CEN
CEN/TC 254/WG 3 "Material properties relevant to win...	CEN
CEN/TC 254/WG 6 "Bridge deck waterproofing"	CEN
CEN/TC 254/SC 2 "Synthetic sheets"	CEN
CEN/TC 601 "Test - First Simple Committee (eCOM3)"	CEN
CEN/TC 602 "Second Test Committee (with children)"	CEN

Click on the committee reference to access the documents

Title	Scope
CEN/TC 44 "Commercial and Professional Refrigerati...	CEN
4/WG 1 "Commercial refrigerated display c...	CEN
CEN/TC 44/WG 2 "Service refrigerated cabinets and ...	CEN
CEN/TC 44/WG 4 "Walk-in cold rooms"	CEN
CEN/TC 44/WG 5 "Refrigerated display cabinets for a...	CEN
CEN/TC 44/WG 6 "Commercial beverage coolers and ...	CEN
CEN/TC 44/WG 7 "Walk-in cold rooms packaged Refr...	CEN
CEN/TC 52 "Safety of toys"	CEN
CEN/TC 52/WG 3 "Safety of toys - Mechanical, physi...	CEN

DOCUMENT

Browse

Advanced search

Clipboard

Administration

?

1.10.0-SNAPSHOT
mbellier@cencen

CEN/TC 601 "Test - First Simple Committee (eCOM3)"

View   Members List   Full Members List   Permissions   History   Trash

The **Library** allows you to browse your documents through a standard folder structure

Browse

Committee documents

Advanced search

Clipboard

Administration

?

Administration (restricted)

General

Meetings

Decisions

Projects

Meeting documents

Lists meetings for the committee (except cancelled meetings) & related documents

Meeting documents

Meeting

Bruxelles (Belgium) 1 Jul 2021

Bruxelles (Belgium) 3 May 2021

The **Committee documents** allows you to view all documents of your committee in a flat view (regardless in which folder they are).

This replaces the N document list.

SEE ALL DOCUMENT

Committee do

N   Title   Modified   Expected Actio

13   Reserved N-number   2021-01-11

     Another Link attempt   2020-11-16

     Memo_02-Dominik_Committee   2020-11-16

     CCMC-Memo_01   2020-11-12

     CCMC-Memo_01   2020-11-12

                                              2020-11-05   Comment/reply

Ballot documents

Lists open and recently closed ballots for the committee & related documents

                                              2020-11-05

Ballot documents

Type   Ballot

CIB-NWI   CEN TC 601 - new WI adoption   1

CIB-NWI   CIB 601/2001 : Check Weights used - EBCEN-662   0

DOCUMENT

Committee structure

Committee documents

Advanced search

Clipboard

View   Members List   Full Members List

Library

Title ↑	
📁	Administration (restricted)
📁	General
📁	Meetings
📁	Decisions
📁	Projects
📁	Member upload area
📁	Mail archive

Committee documents

SEE ALL DOCUMENTS...

N ↑	Title	Modified	Expected Action
13	Reserved N-number	2021-01-11	
	Another Link attempt	2020-11-16	
	Memo_02-Dominik_Committee	2020-11-16	
	CCMC-Memo_01	2020-11-12	
	CCMC-Memo_01	2020-11-12	
12	Doc-General-01	2020-11-05	Comment/reply
11	Doc-Project-02	2020-11-05	

Meeting documents

Meeting	
Bruxelles (Belgium) 1 Jul 2021	📄 1
Bruxelles (Belgium) 3 May 2021	📄 0

Ballot documents

Type	Ballot	
CIB-NWI	CEN TC 601 - new WI adoption	📄 1
CIB-NWI	CIB 601/2001 : Check Weights used - EBCEN-662	📄 0

?

1.10.0

Add New Document

Favorite Committee

Quick Search

View Committee Structure

Search for documents within the committee

Search for documents across committees

Clipboard used to move Documents

Beacon → Documents Knowledge Base

CEN

CEN/TC 601 "Test - First Simple Committee (eCOM3)"

DOCUMENT

Committee structure

Committee documents

Advanced search

Clipboard

Library

Committee documents

Title ↑		N ↑	Title	Modified	Expected Action
📁 Adm				2021-01-11	
📁 General			Another Link attempt	2020-11-16	
📁 Meetings			Memo_02-Dominik_Committee	2020-11-16	
📁 Decis				2020-11-12	
📁 Projects			CCMC-Memo_01	2020-11-12	
📁 Member upload area		12	Doc-General-01	2020-11-05	Comment/reply
📁 Mail archive		11	Doc-Project-02	2020-11-05	

Meeting documents

Ballot documents

Meeting		Type	Ballot	
Bruxelles (Belgium) 1 Jul 2021	1	CIB-NWI	CEN TC 601 - new WI adoption	1
		/2001 : Check Weights used - EBCEN-662		0

1.10.0

View Members List Full Members List History

2 result(s)

	N	Title	Type	Subtype	Meeting	Expected action	Exp. date	Status	Modified	
⚙	22	CEN-TC247_CEN-SABE-ENIS_N0497_Call_for_experts_for_PT_on_testing_suppl.pdf	General document	Other				To be notified	2021-02-09	✓
	21	CEN-TC247_34_207e_INF.pdf	General document	Other				To be notified	2021-02-09	✓

+
DOCUMENT

Committee structure

Committee documents

Advanced search

Clipboard

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Breadcrumb : Navigation in your Committee

Committee and TC home page

Parent folders

We are in a working group

Document/folder name

Document types % Folders

Improved document classification

Document type is automatically assigned according to the folder in which you upload your document

Folder name	Document types
Administration (restricted)	File (non-N document)
General	Ballot, General, Meeting, Project, Decision documents
Meetings	Meeting documents
Decisions	Decision documents
Projects	Ballot and Project documents
Member upload area	File (non-N document)
Mail archive	Email (automatically created)

Document types : eCommittees vs CEN Documents

eCommittees types	CEN Documents types
Public document	General
Other Committee Document	General
Draft	Project
Meeting	Meeting
Resolution	Decision
Ballot	Ballot

5. Search & download

Committee document search

Committee document search

Advanced search & save search

Quick search

Quick Search allows you to perform a Full-text search throughout all your documents and their metadata, including the body of the documents.

Zip and download

Download selected files

QR code: from print to digital

Scan it and you are taken to the online digital version

Dynamically generated in your cover pages

IMG_7940.MOV

6. Manage documents

Create a document

1. Open the folder in which you wish to create your document and click on **+DOCUMENT**
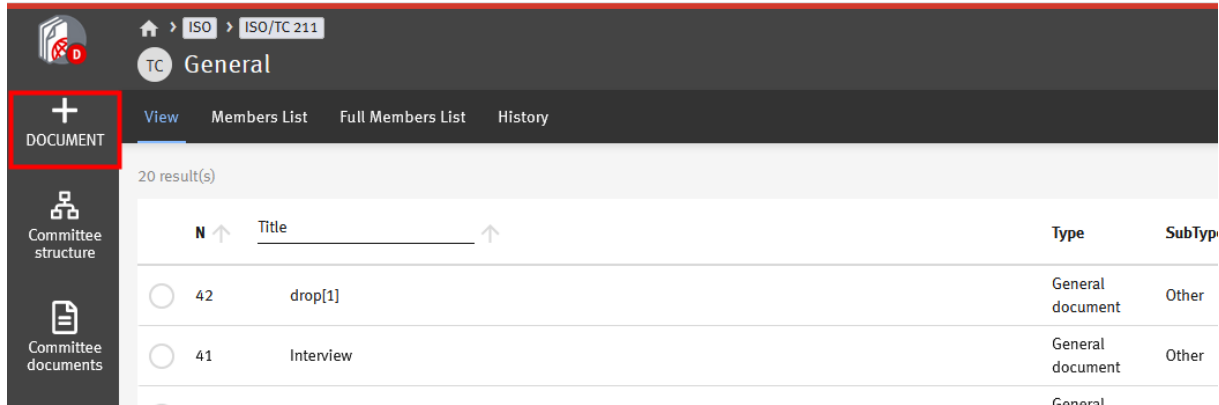
2. Select the type of document you wish to create
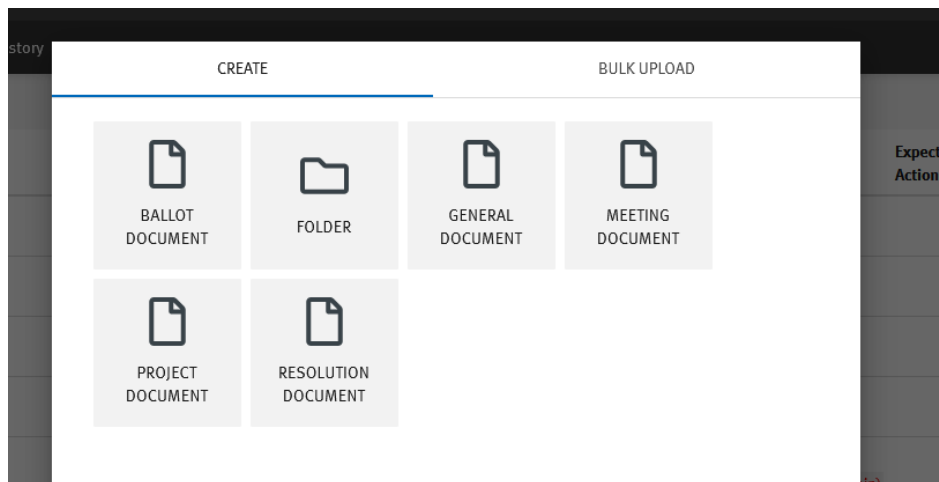
- Type of allowed Document depends on target Folder
- The type of document you select is important as it will drive the metadata displayed

Create a document

3. Fill in the metadata

Here, the Meeting document type allows you to link the document to an existing meeting

Navigate to related content

Decisions

Replaces Resolution document type from eCommittees

Can be linked to:

➢ Ballot

➢ Meeting

➢ *Project* (→ *later*)

Searchable by decision number and year

1 Doc may contain N Decisions

➢ Start / End numbers

Bulk upload

1. Open the folder in which you wish to add your documents and click on **+DOCUMENT**
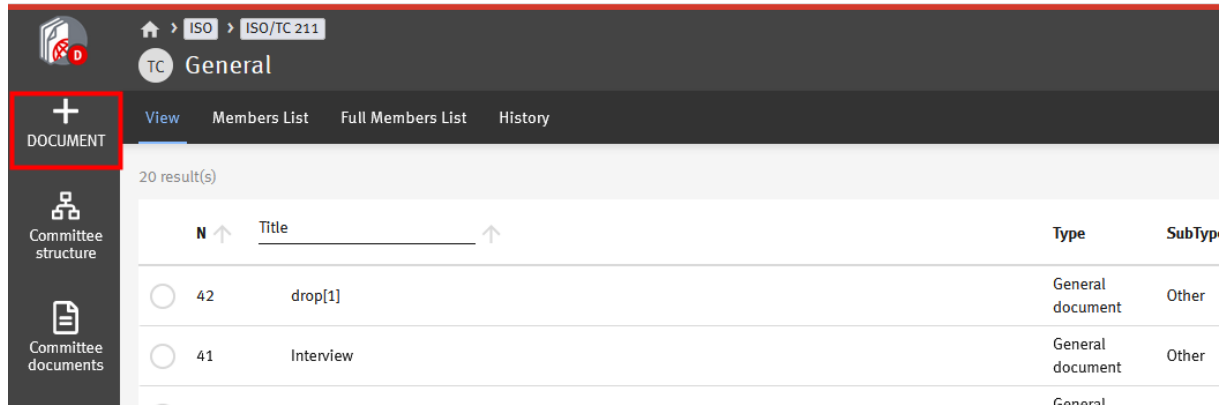
2. Select **BULK UPLOAD**
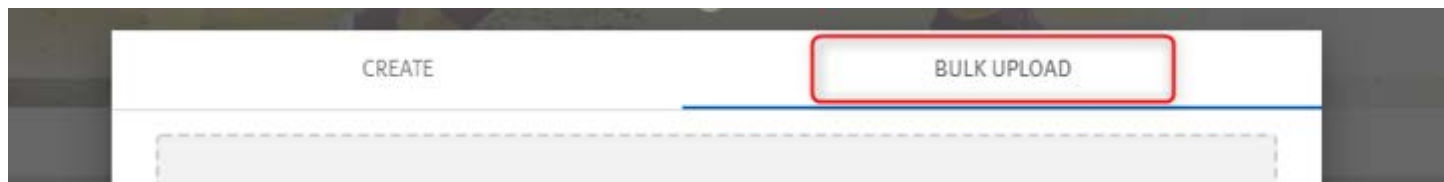
3. Drag & drop your documents, or just click on the text to select your files

Bulk upload (cont.)

4. Select Document Type and enter Metadata

Enter the metadata for each document or copy the metadata to all document by clicking on **Apply to all**

Document lifecycle

Document numbering

N-numbers are assigned automatically

Possible to reserve a N-number

No longer possible to manually select an N-number (➡ avoid "holes" in N sequence)
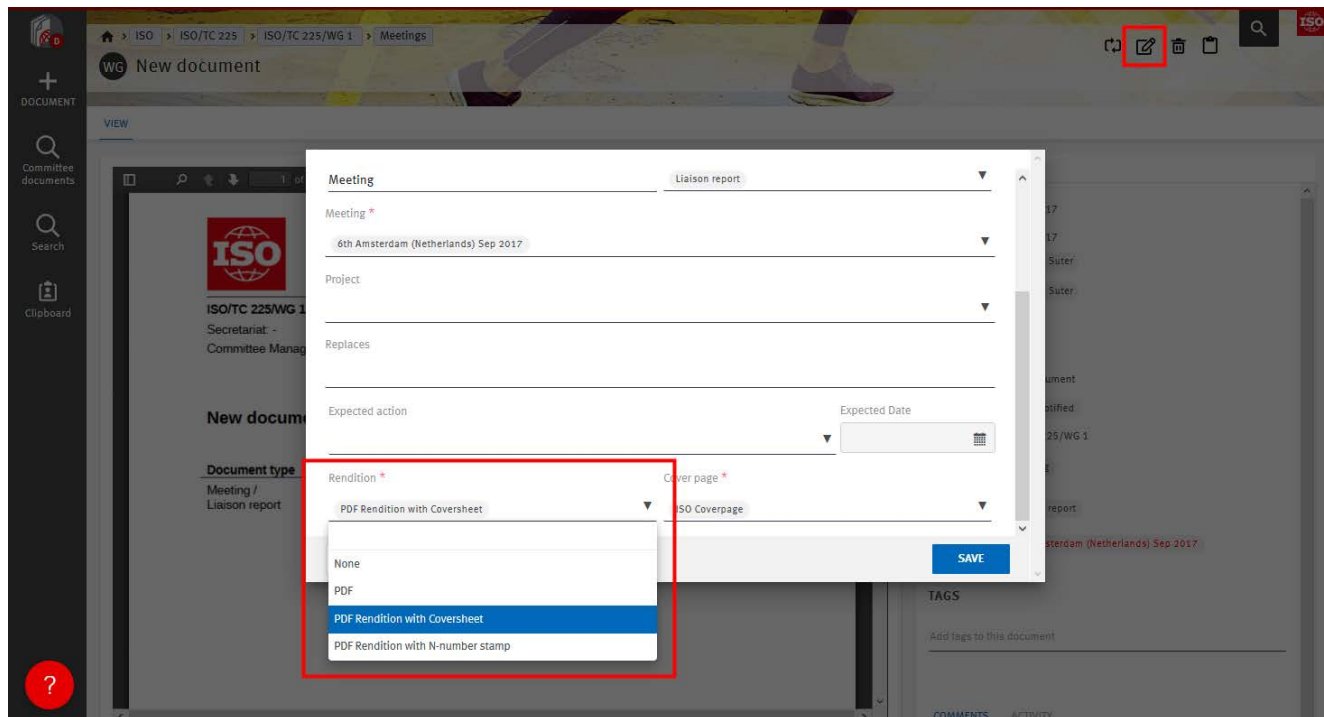
When a document is deleted, its number is automatically reassigned to the next document uploaded

PDF rendition

✓ PDF rendition supports PDF, Word, Excel, Powerpoint and images

✗ Protected document, Zip files

Correct rendition error

✎ Edit metadata and at the bottom of the form change the rendition to None

Move documents/folders → Clipboard

The **Clipboard** moves Documents/Folders from a folder to another**:**

1. Select the document/folder(s) to move
2. Click on Copy to clipboard icon
3. Open the destination folder, then click Move

Committee root folders are restricted to certain document types. You cannot move a meeting document within the Projects folder and vice versa.

Move to Clipboard

move selected files to clipboard

Move from Clipboard

selected destination folder

Click on Move

Notify a document

1 Select the document(s) to be notified

2 Click on the envelope icon from the top right hand-corner
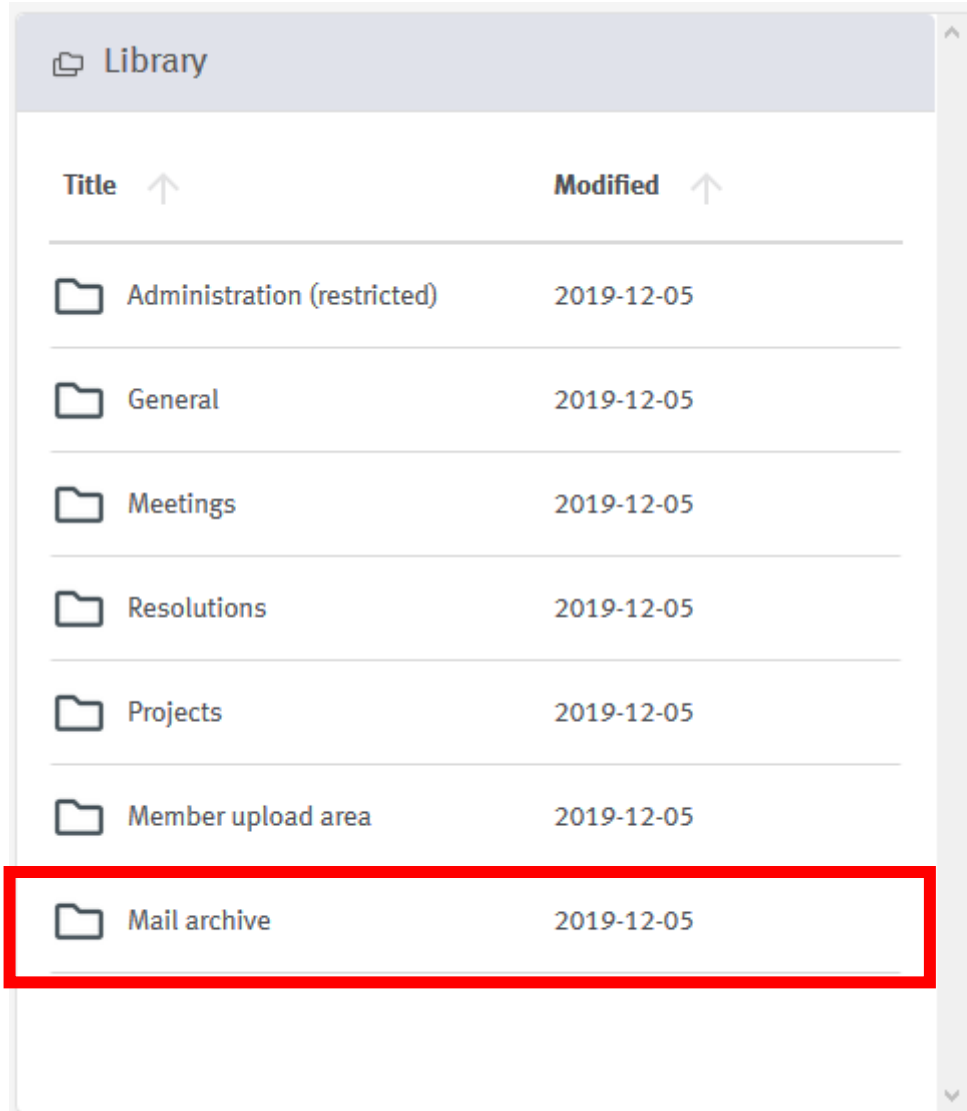
3 Enter the message to be sent and click on Notify

⚠ At this stage, it is not possible to select some members of the committee for notification. The message is sent to the whole audience of the committee by default.

⚠ Pending notification reminder (one email for all your committees)

Mail archive

All emails* sent from CEN Documents

are archived in **Mail archive**

Searchable via the Advanced search

All the audience of the committee can browse the mail archive

READ ONLY!!

*document notifications and email to members

Members list and full members list
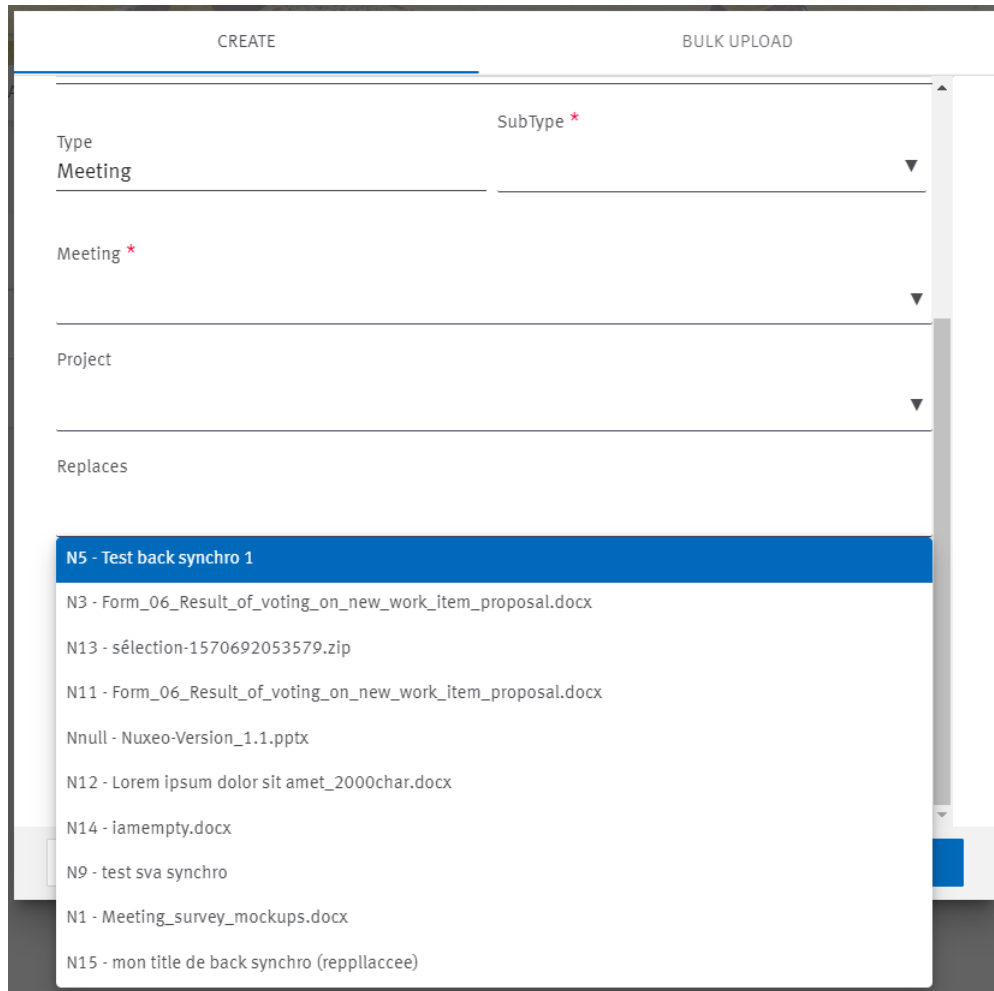
Members List

Shows the list of people directly involved in the committee/WG work

Access **Email to members**

Full Members List

Shows the list of people having access to the document of the committee

Access **Export to CSV**

Replace a document

In the document creation screen click on **Replaces**.

This field allows you to search and select one document of your committee. This will link these two documents

Withdraw a document

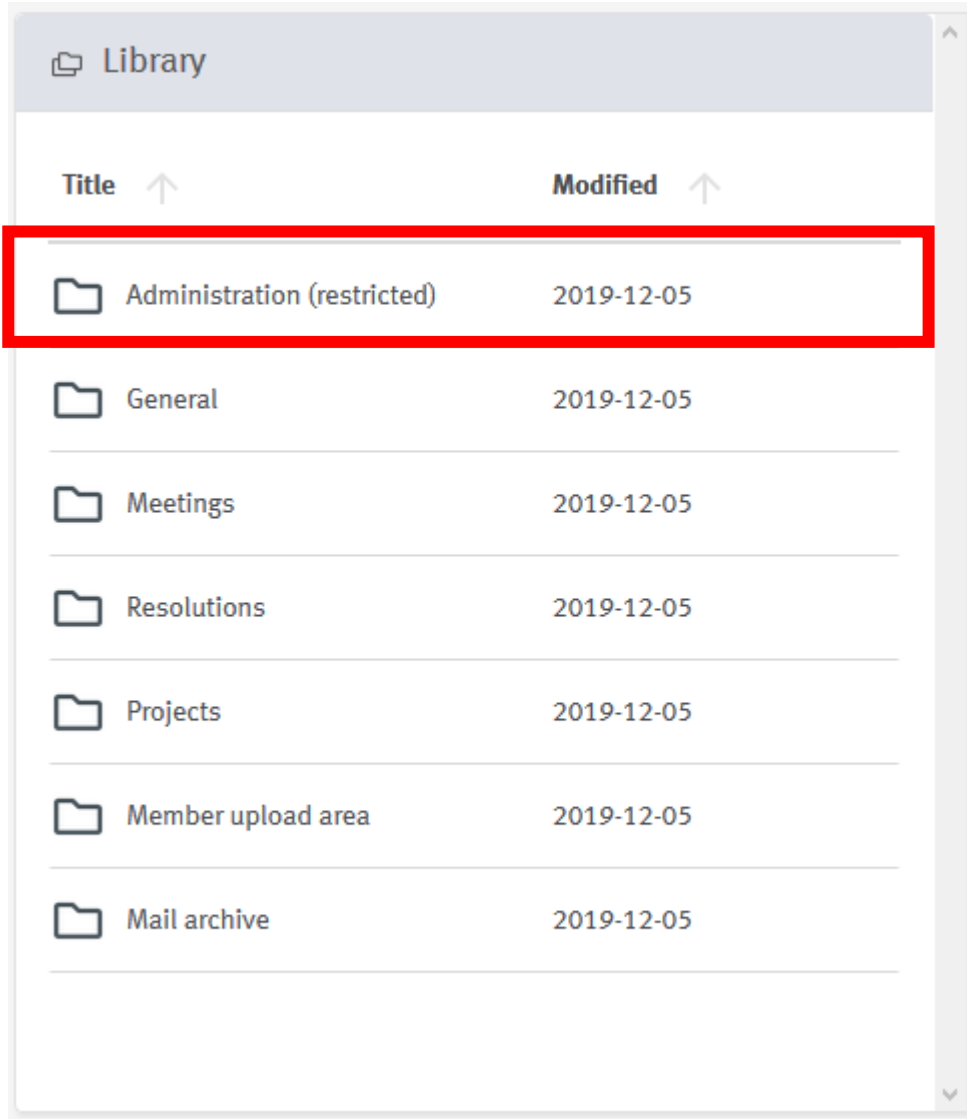Open the document details page and click on Cross icon

⚠️ Withdrawn documents can no longer be downloaded nor previewed by anyone, including Secretaries and Convenors

7. Member upload area & Administration folders

Administration (restricted)

Library	
Title ↑	**Modified** ↑
📁 Administration (restricted)	2019-12-05
📁 General	2019-12-05
📁 Meetings	2019-12-05
📁 Resolutions	2019-12-05
📁 Projects	2019-12-05
📁 Member upload area	2019-12-05
📁 Mail archive	2019-12-05

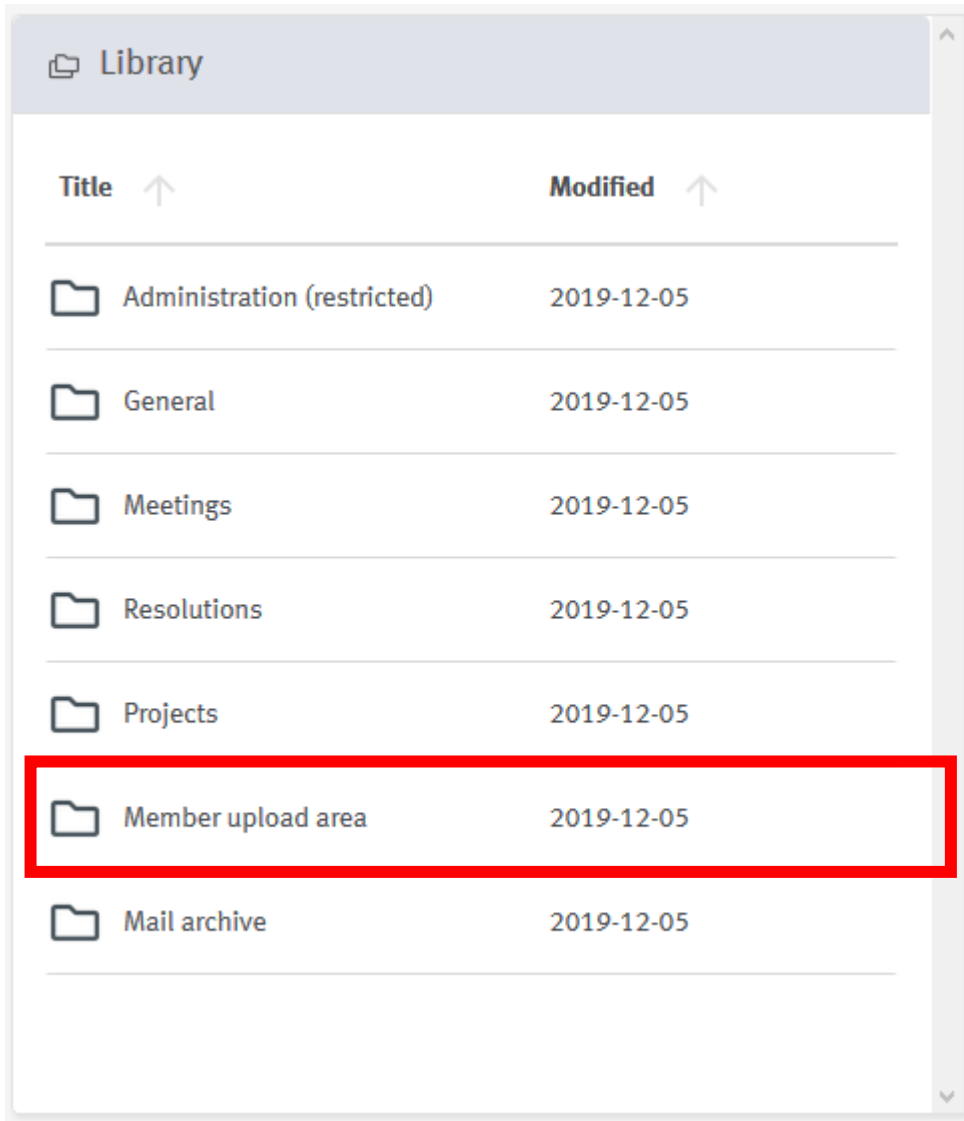Working area for Managers

= Secretariat workspace

Documents do not have a N-number

👁 Managers (CM & Support teams)

Member upload area

Upload area for members of the committee/working group wishing to share large files with the Managers

⚠️ Managers are not notified of new upload!

👁 All documents are visible to all the committee members

8. eCommittees vs CEN Documents

eCommittees vs CEN Documents

https://helpdesk-docs.iso.org/article/480-ecommittees-vs-iso-documents-pilot

Page in ISO Documents Knowledge base

Document management

+ DOCUMENT	eCommittees		ISO Documents	
N documents	✅	3 steps process	✅	1 step simplified process, same lifecycle model
Cover page	✅		✅	Improved visibility
Replace document	✅		✅	
Withdraw document	✅		✅	
Default top folder structure	✅		✅	Folder names revised, content types reinforced
Bulk upload	❌	Not available	✅	Drag and drop multiple files with no extra plugin required
Resolutions management	❌		✅	Meta data storing resolution number and year & search
Meta data	〰️	Simple text values	✅	Live Meetings and Projects picker for richer context
PDF rendition	〰️	PDF and Word	✅	PDF, Word, Excel, PowerPoint & more
Set N number manually	〰️	Available to compensate empty numbering sequence	〰️	N numbers are reused automatically
Public folder	✅	Available (but rarely used)	❌	No anonymous access
Reserve N number	✅		❌	
Create cover page only	✅		⌛	Planned for a later stage

9. Summary CEN vs ISO Documents

Main Differences – CEN % ISO

➢ Folder Structure Mapping :

Content Server	Nuxeo
00. Secretariat workspace	Administration (restricted)
01. Public information	For CEN : Documents in this folder will be migrated to folder 'Administration' (in subfolder named 'Reference Information')
02. General committee documents (N)	General (N)
03. Meetings (N)	Meetings (N)
	Decisions (N) (*now same name at ISO*) | **Absent from WG**
04. Projects (N)	Projects (N) | **No Ballot Documents for WGs**
05. Drop-in box for members	Member upload area
(Mail Archive : in Navigation Menu)	Mail Archive (now appears as a Folder)

Main Differences – CEN % ISO

- Roles :
  - CEN Committee Secretary % ISO Committee Manager
  - CEN Specific : Committee Observer, Consultant, Sect. Rapporteur,…
- Vocabulary :
  - Status : Dormant (CEN) % StandBy (ISO)
  - *Decision (CEN) % Resolution (ISO)*
  - WG Secretariat (CEN) % Convenorship (ISO)
- Document types :
  - Ballot Types (Enq, FV, … % DIS, FDIS, …)
- CEN Project link : → Still working on it …

10. Support & help

Integrated Knowledge Base

Help: click on the "Beacon"
Integrated Knowledgebase
+ Technical Support at the CEN
Helpdesk at ISO :
helpdeskcentc@iso.org

+ CEN Specific issues :
ITsupport@cencenelec.eu
("*CEN Documents*" in subject)

Additional Resources

- The recording of this session and the slides will be made available for you on the CEN Intranet (IT space).

- Chunk lists + FAQ available on CENTC :
  https://cen.iso.org/livelink/livelink?func=ll&objId=9510224&objAction=browse&viewType=1

- The SD-Documents knowledge base is available here:
  https://iso-sandbox-knowledge-base.helpscoutdocs.com/collection/301-iso-documents

- The ISO Project webpage may also be useful :
  (https://www.iso.org/iso-documents-GG-0A1B2C-2)

IT TOOLS FOR STANDARDS DEVELOPMENT

ISO DOCUMENTS GENERAL ONBOARDING

ISO DOCUMENTS: AN INNOVATIVE AND INTUITIVE PATH TO FAMILIAR CONTENT

This page is dedicated to Committees and Working Groups onboarding to ISO Documents. It contains all necessary information to ensure a smooth transition from eCommittees to ISO Documents. It will be updated regularly with all the latest news, support materials and any other useful resource.

LATEST NEWS

FINAL ONBOARDING DATES FOR COMMITTEES

Over the past weeks, the project team has been working with TCs, SCs, and WGs to ensure onboarding dates do not come in the way of any important work.

RESOURCES

VIDEO

ISO   QR Codes for ISO Documents   📋 Copy link

https://www.iso.org/iso-documents-GG-0A1B2C-2

Support for experts and committee members

- We will provide drafted communication message to send to your experts / delegates

- A [Quick guide for experts and delegates](#) is available on the KnowledgeBase

11. What's next?

Next steps :

⚠️ • Starting now : If possible, please avoid any TC/SC/WG changes (Creation, Name change, Move, …)

🇩🇪 • Before 9 march - Advice for DIN Secretaries : Notify as much documents as possible

• ISO has started Pre-Migration of Chunk 1 Documents

• On Tue 2021-03-09 : Chunk 1 Go-Live :
  ➢ Content freeze : No more Uploads on eCommittees
  ➢ Downloads from eCommittees still possible
  ➢ CEN Documents should be available for Chunk 1 on next day

cen

Questions / Answers

Thank you