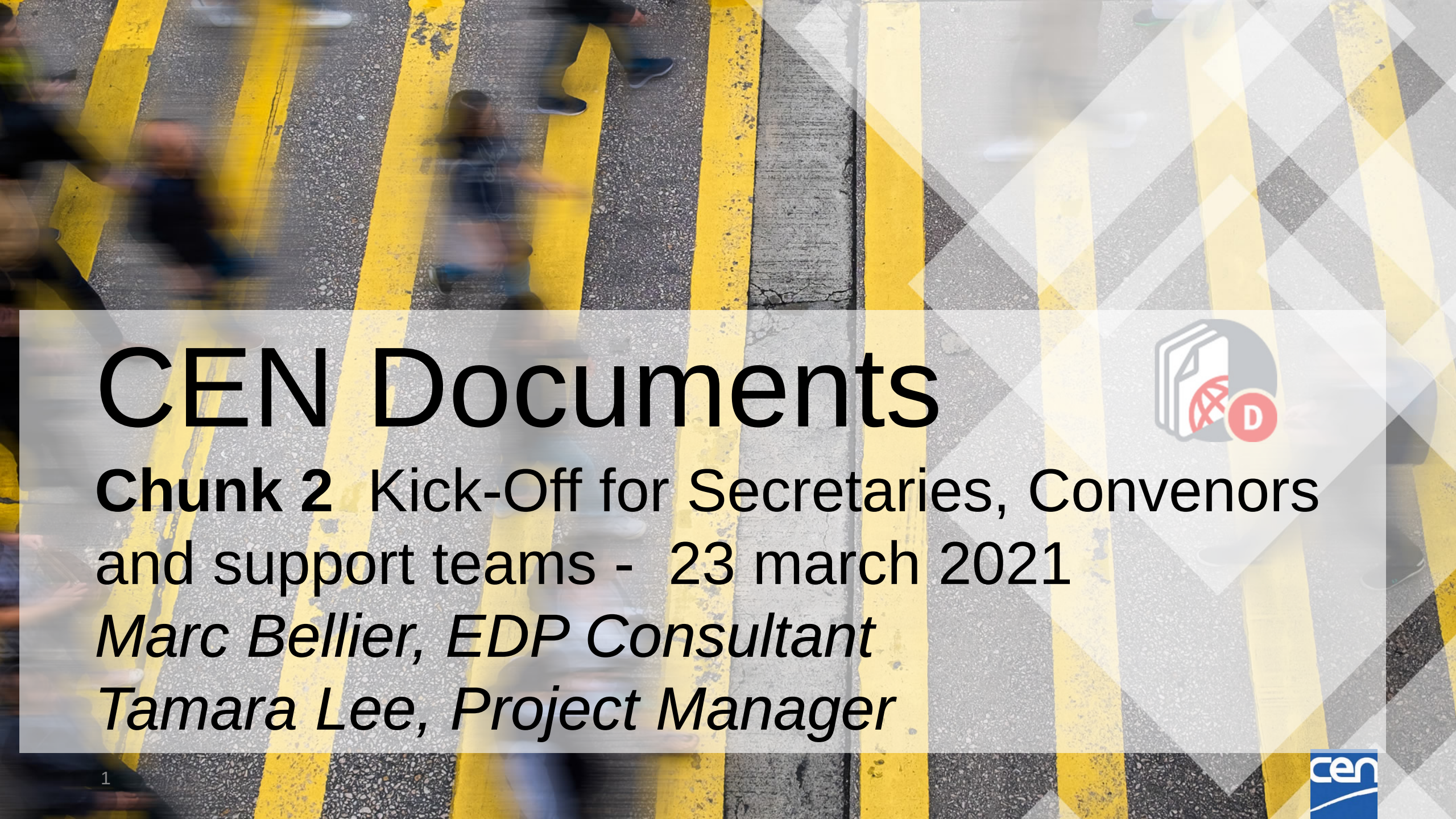


CEN Documents

Chunk 2 Kick-Off for Secretaries, Convenors and support teams - 23 march 2021

Marc Bellier, EDP Consultant
Tamara Lee, Project Manager

Agenda

1. **Planning**

2. **General Information**

3. **Access**
   - 3.1 Access CEN Documents
   - 3.2 Who has access to CEN Documents

4. **Navigation**
   - 4.1 Navigation
   - 4.2 Library & Committee documents
   - 4.3 Document preview
   - 4.4 Member list

5. **Search & Download**
   - 5.1 Committee search
   - 5.2 Global search
   - 5.3 Save search
   - 5.4 Content search
   - 5.5 Zip & Download

6. **Manage documents**
   - 6.1 Create a document
   - 6.2 Update/delete a document
   - 6.3 Bulk upload
   - 6.4 Actions on Documents
   - 6.5 Clipboard
   - 6.6 Notify Documents
   - 6.7 Replace/withdraw a document

7. **Member upload area & administration folder**

8. **eCommittees vs CEN Documents**

9. **Summary CEN vs ISO Documents**

10. **Support & help**

11. **Next Steps**

Questions & Answers

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)**

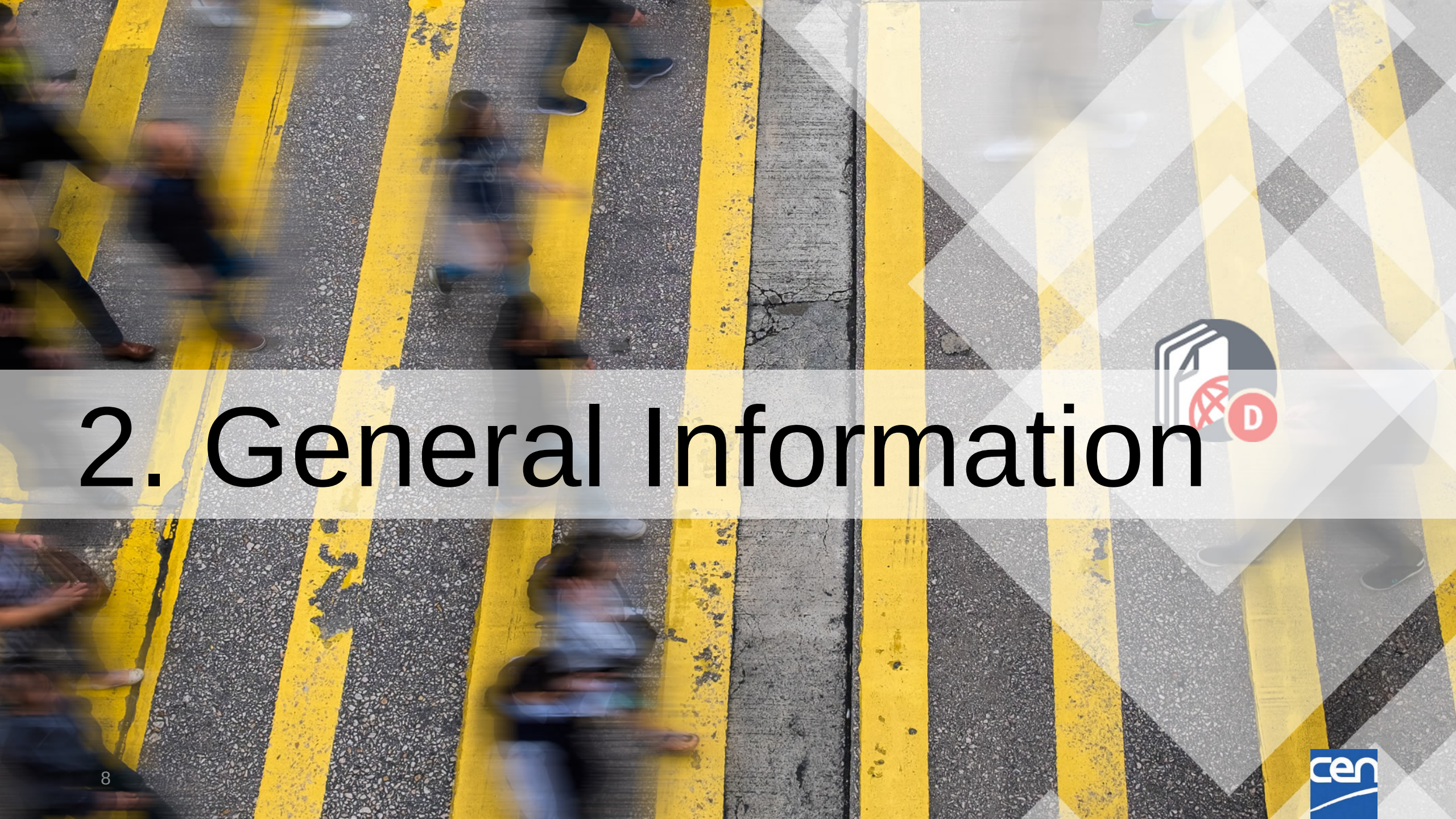
- 2021-03-02 : Kick-Off Webinar
- 2021-03-09 : Launch Date → Document Freeze !

Chunk 2 : ***628 (~ 114 TCs, 8 SCs, 506 WGs)*** → **569 (92 TCs, 6 SCs, 471 WGs)**

- *2021-03-23* : 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

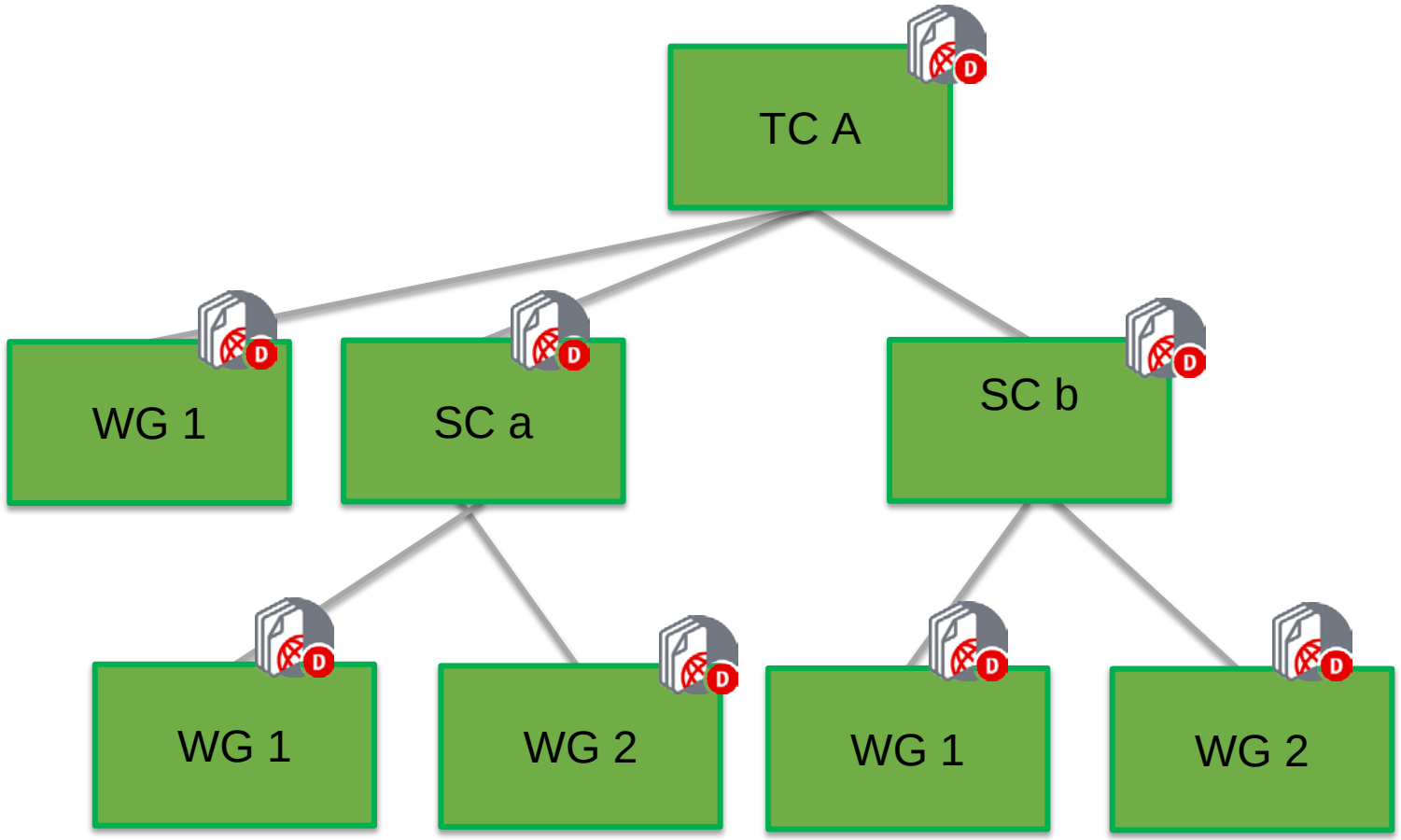
- Initial plan = migrate full TC structures and their children SC and WG with all their documents to CEN Documents
- End February : AFNOR servers unavailable

➔ Chunk 1 : All AFNOR Committees excluded

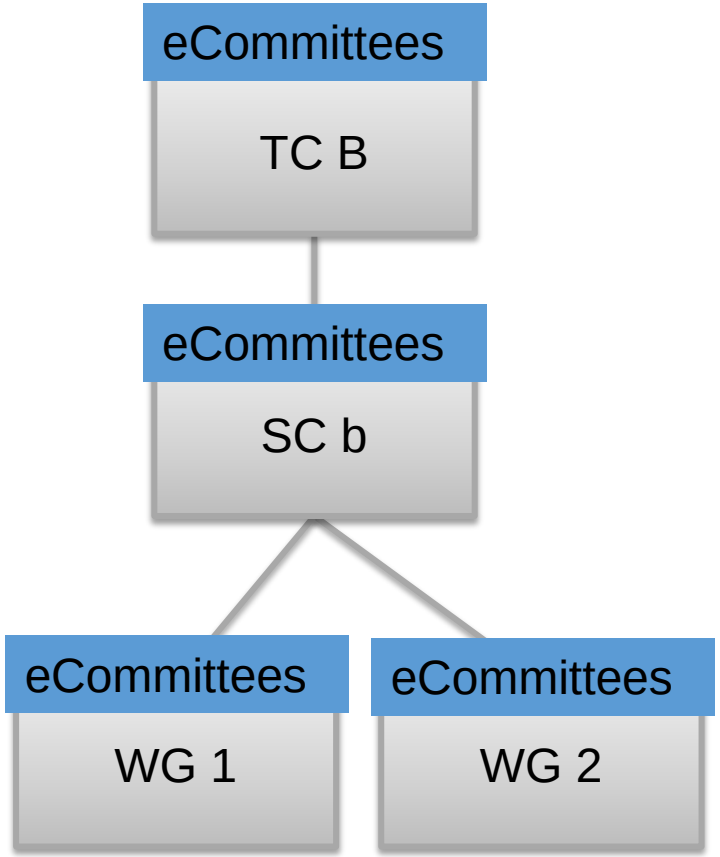
➔ Chunk 2 : Includes AFNOR committees hosted on CENTC selected for Chunks 1 and 2

- Documents of Non-migrated groups (= Chunk 3 and AFNOR hosted Committees) will still have to be accessed via eCommittees

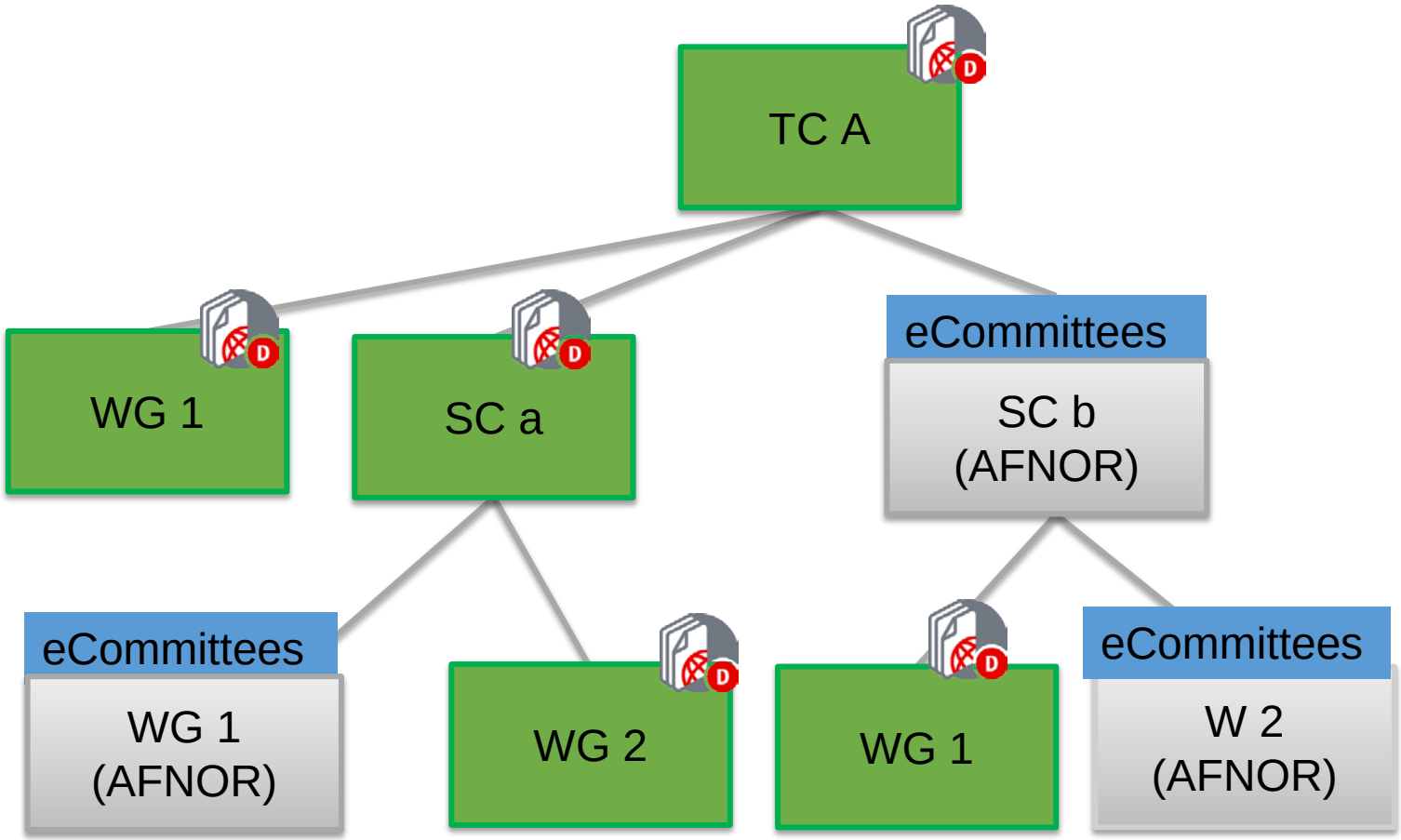
Initial Plan :
Chunk 1 and 2 Structures



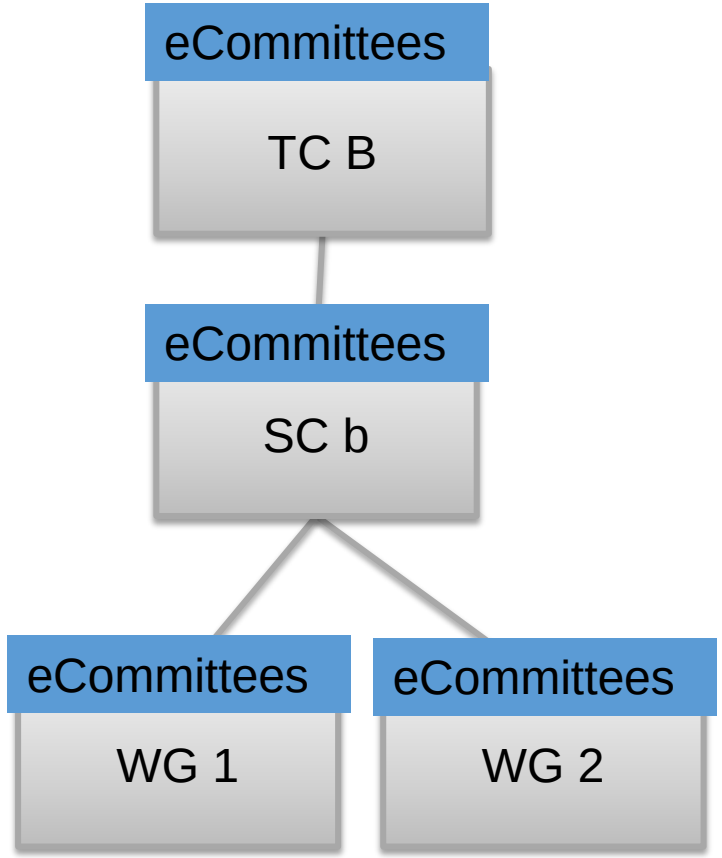
Other Committees
(Chunk 3)



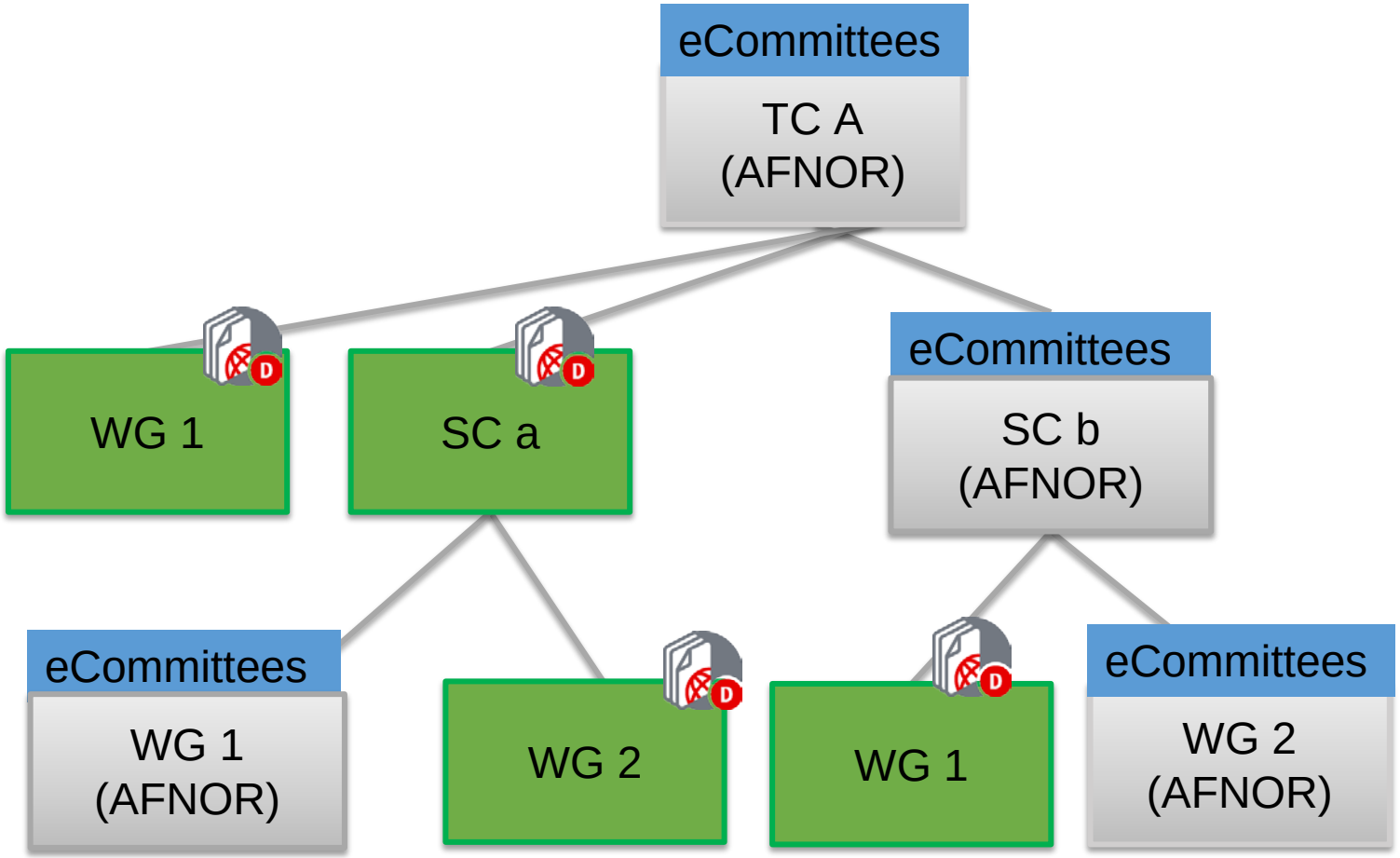
Reality :
Chunk 1 and 2 Structures



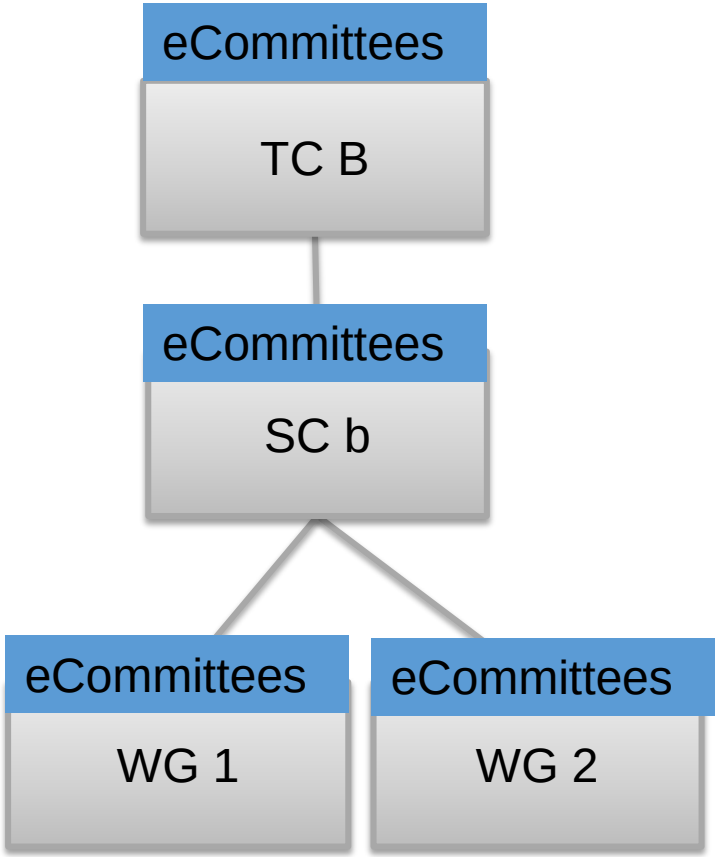
Other Committees
(Chunk 3)



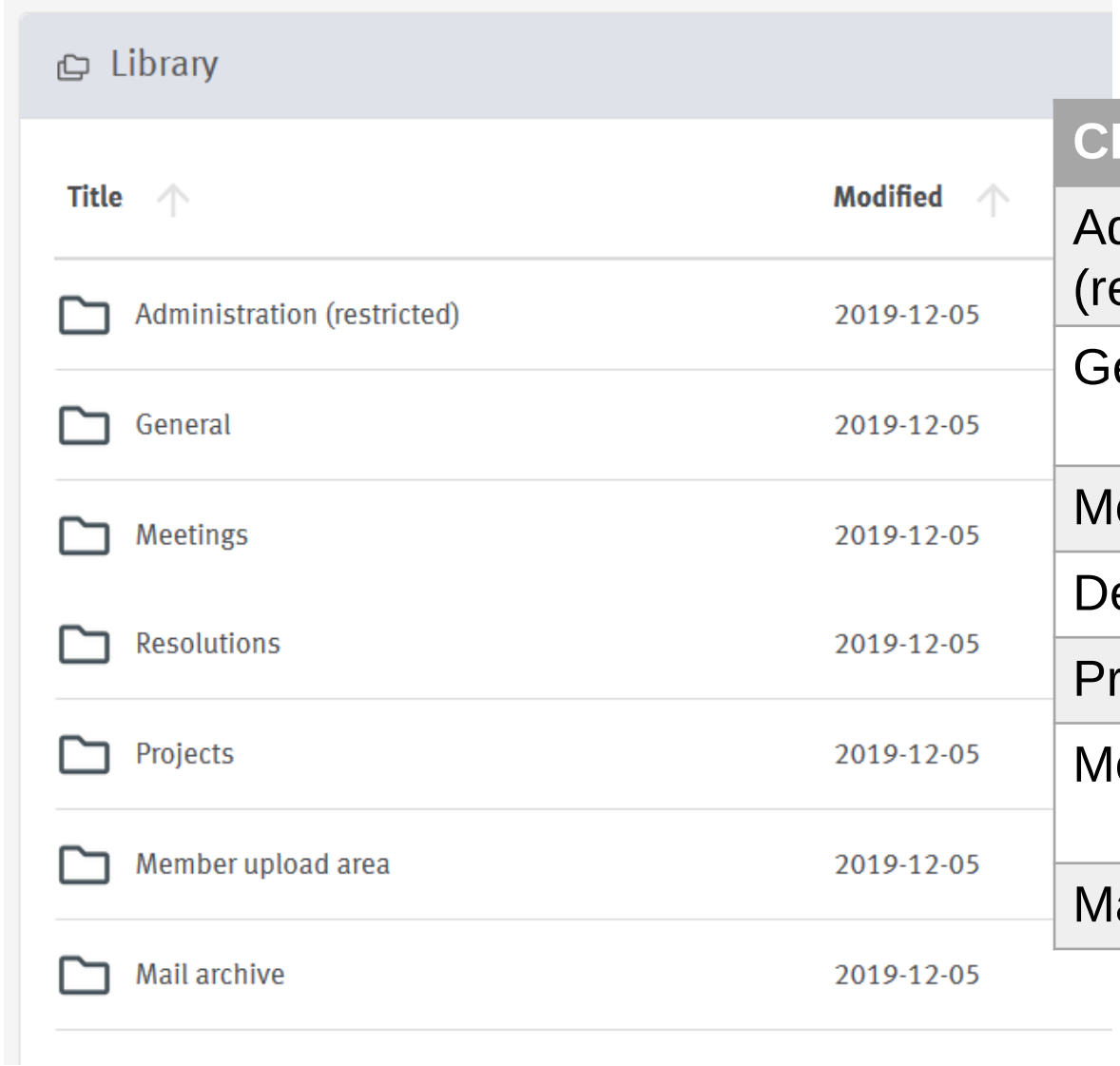
Reality :
Chunk 1 and 2 Structures



Other Committees
(Chunk 3)



Library folders : Cen Docs ← eCommittees



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, …)
  - o DIN hosted Committees : Only Notified N-Docs
    ➔ Notify before Migration !

- ✓ All mail archive (email to members and N-document notifications)
- o *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, …

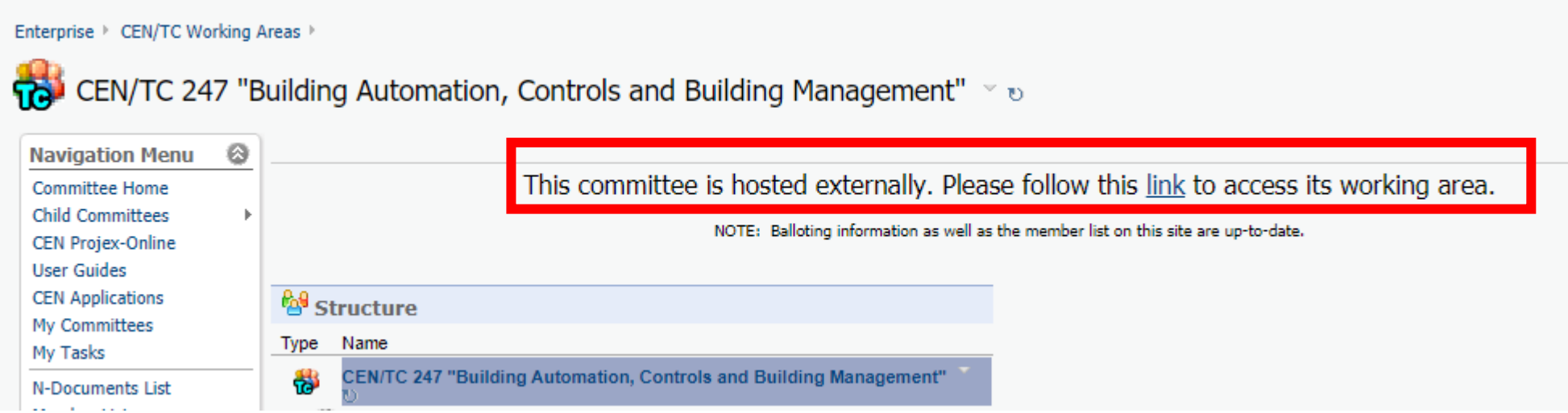
Committees currently hosted at AFNOR & DIN will now be managed within CEN Documents

3. Access

Access :

- Direct Link to Homepage : 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 '***Documents***' will point to the new environment.

Who has Access ?

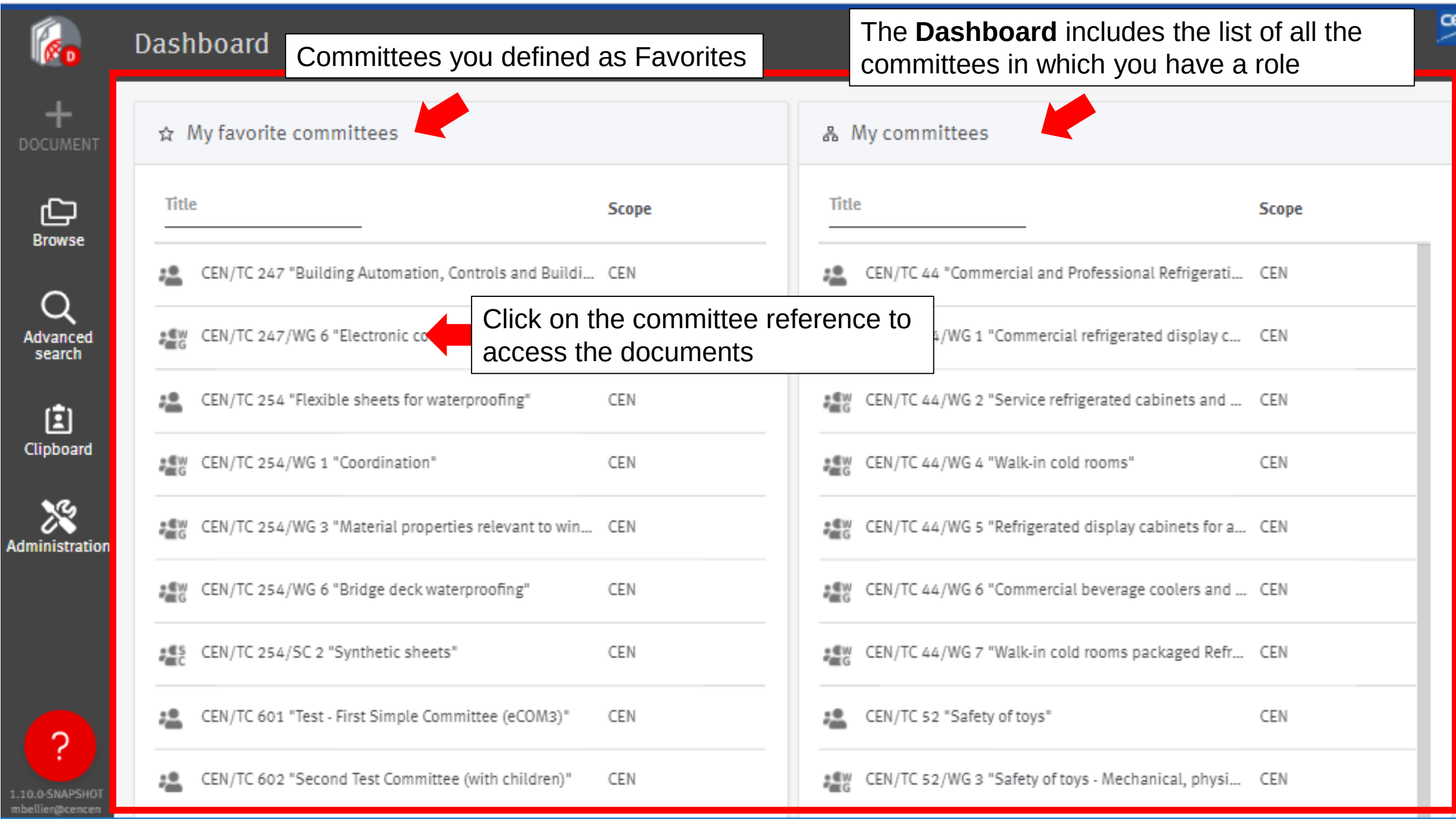
- same rules as in eCommittees :

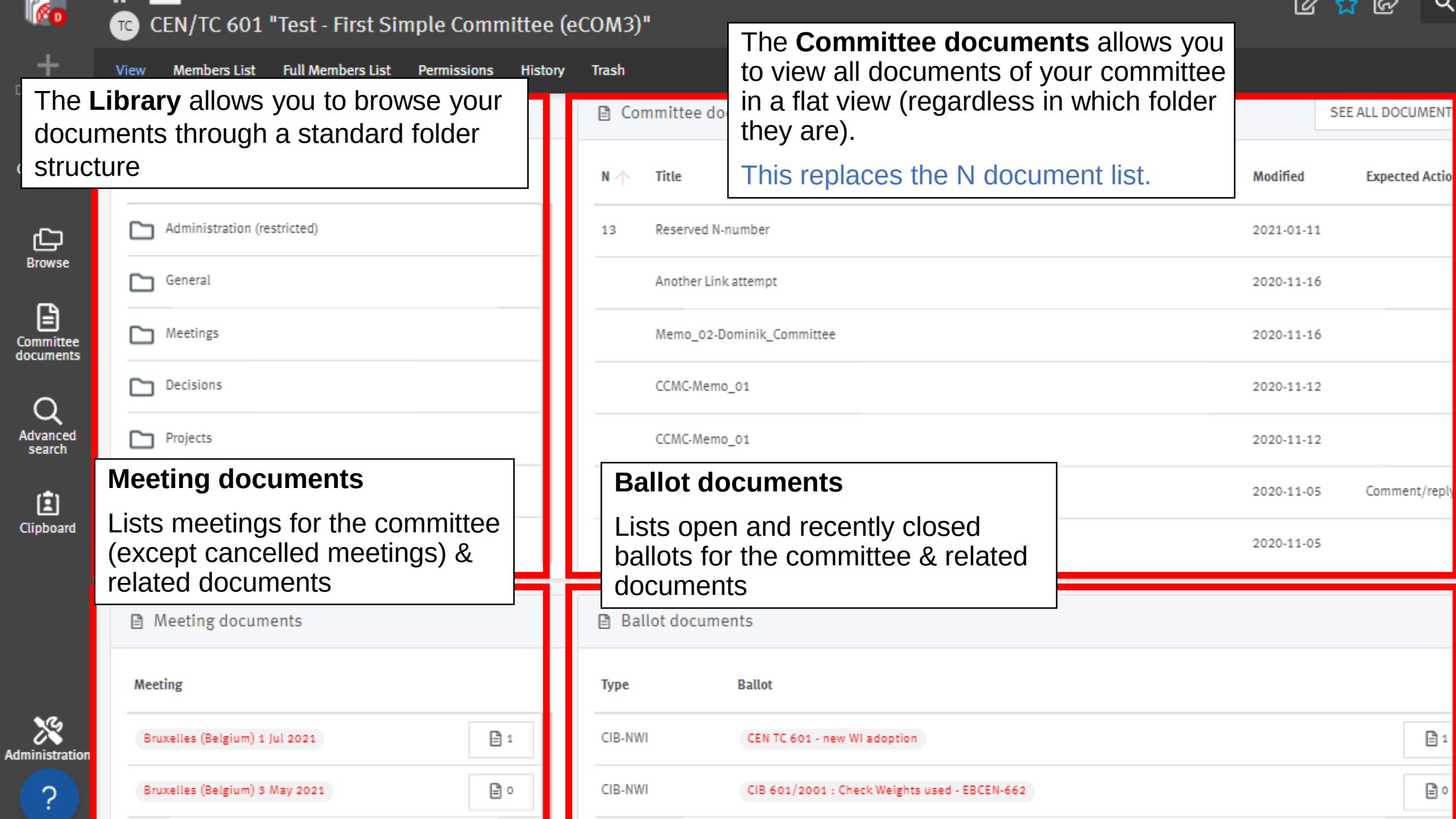
✓ Manager roles [R/W] : Secretaries, Convenors, Support Teams, …

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

O 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
The **Dashboard** includes the list of all the committees in which you have a role
DOCUMENT
Browse
Advanced search
Clipboard
Administration
My favorite 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
My committees
Title
Scope
CEN/TC 44 "Commercial and Professional Refrigerati... CEN
/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
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
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.
Browse
Committee documents
Advanced search
Clipboard
Administration
Administration (restricted)
General
Meetings
Decisions
Projects
SEE ALL DOCUMENT
N
Title
Modified
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/repl
2020-11-05
Meeting documents
Meeting documents
Lists meetings for the committee (except cancelled meetings) & related documents
Meeting
Bruxelles (Belgium) 1 Jul 2021
Bruxelles (Belgium) 3 May 2021
Ballot documents
Ballot documents
Lists open and recently closed ballots for the committee & related documents
Type
Ballot
CIB-NWI
CEN TC 601 - new WI adoption
CIB-NWI
CIB 601/2001 : Check Weights used - EBCEN-662

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

DOCUMENT
Committee structure
Committee documents
Advanced search
Clipboard

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	

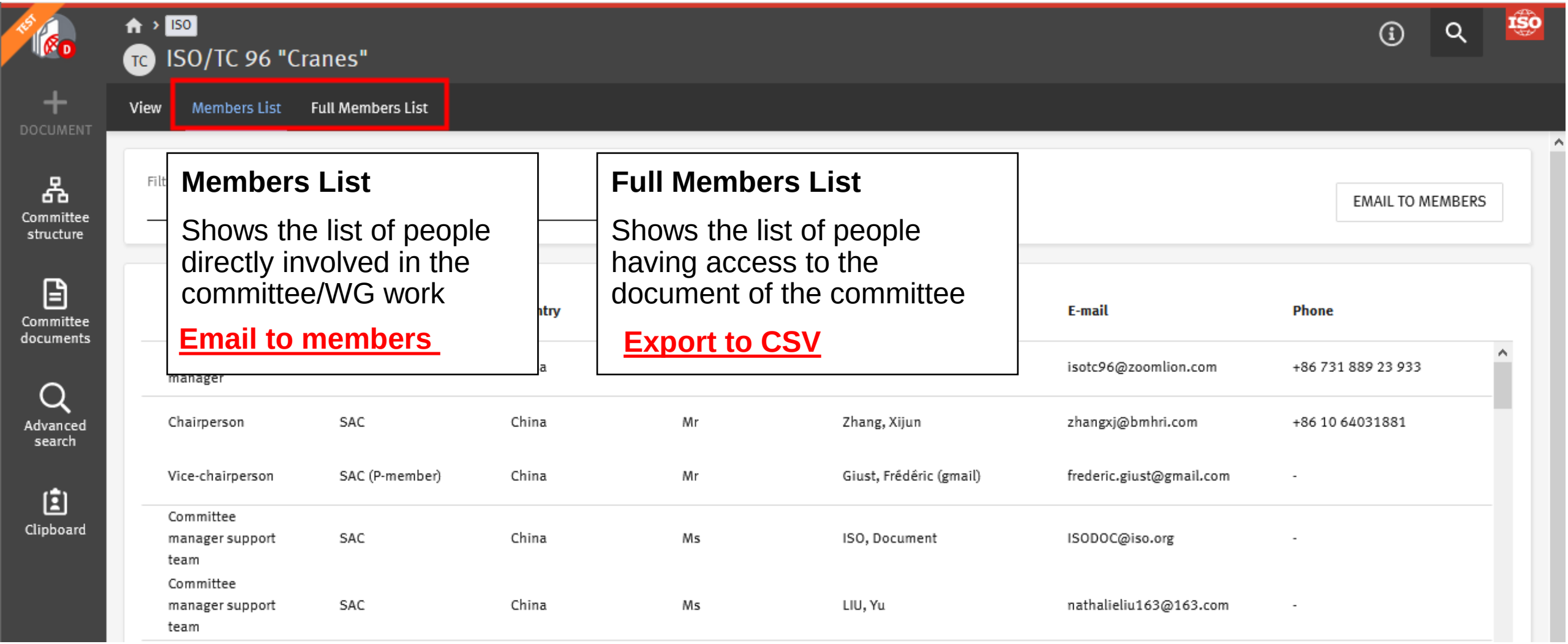
Meeting documents

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

Members list and full members list



Members List

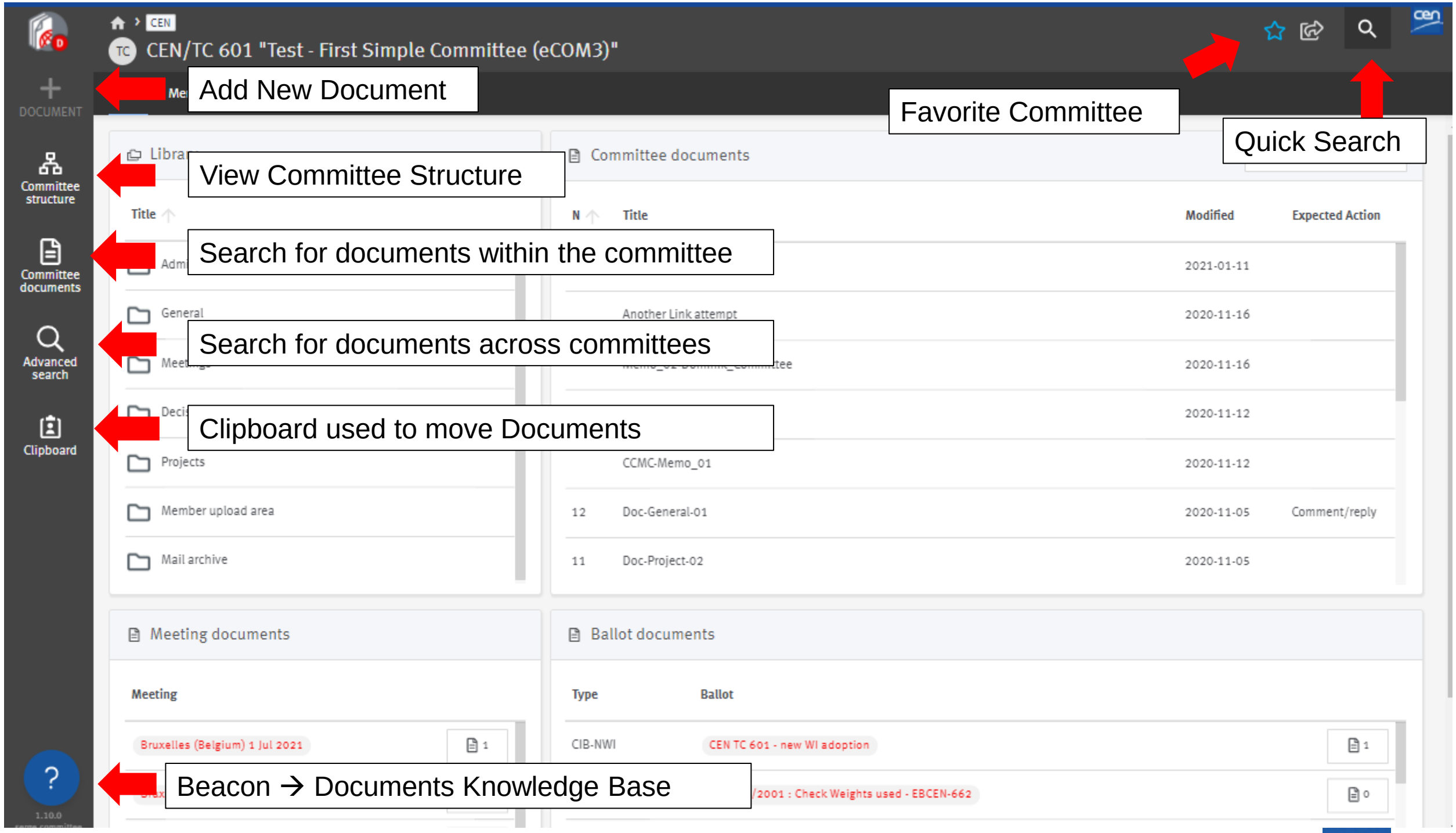
Shows the list of people directly involved in the committee/WG work

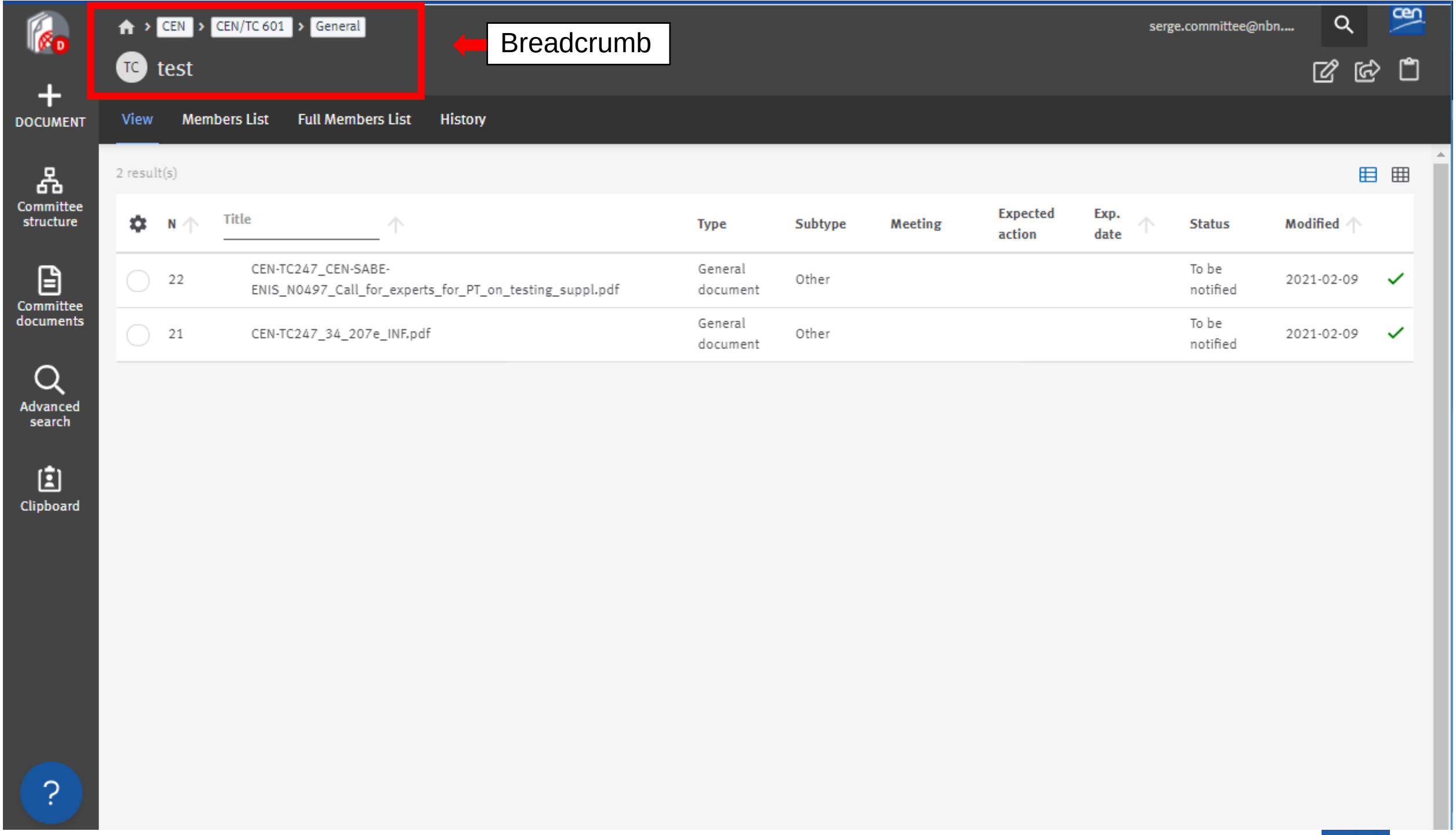
Email to members

Full Members List

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

Export to CSV

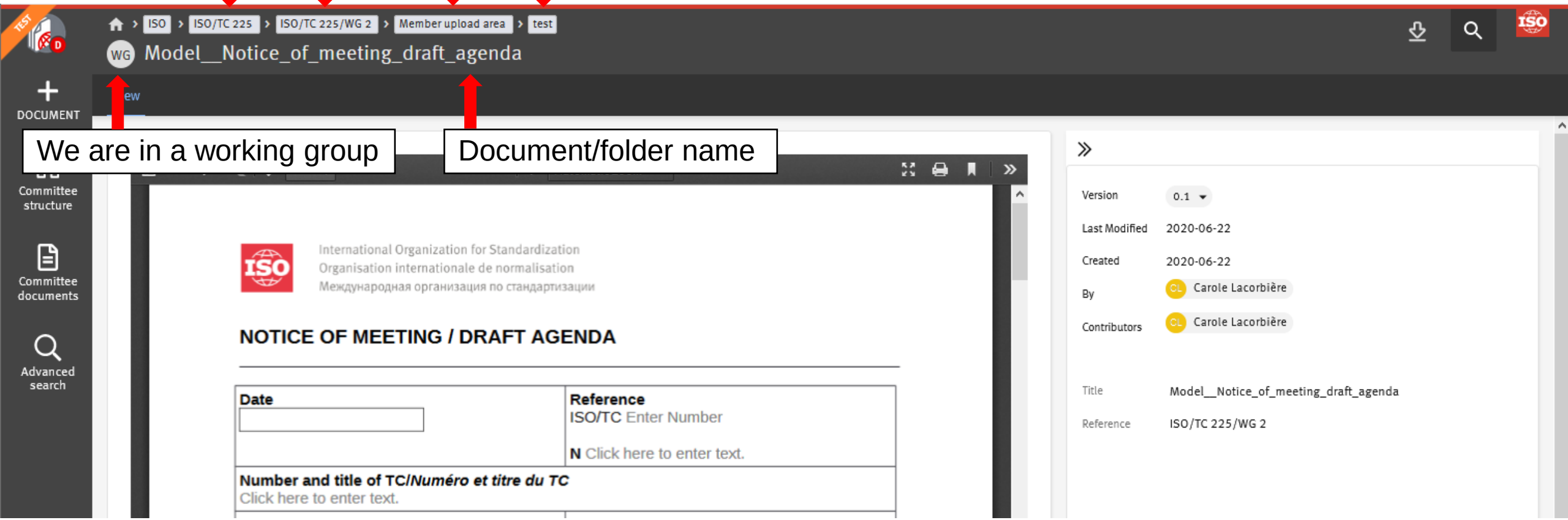

CEN
CEN/TC 601 "Test - First Simple Committee (eCOM3)"
DOCUMENT
Committee structure
Committee documents
Advanced search
Clipboard
Add New Document
View Committee Structure
Search for documents within the committee
Search for documents across committees
Clipboard used to move Documents
Favorite Committee
Quick Search
Committee documents
Title
N
Modified
Expected Action
General
Projects
Member upload area
Mail archive
2021-01-11
Another Link attempt
2020-11-16
2020-11-16
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
Ballot documents
Type
Ballot
CIB-NWI
CEN TC 601 - new WI adoption
Beacon → Documents Knowledge Base


CEN
CEN/TC 601
General
TC
test
Breadcrumb
serge.committee@nbn....
DOCUMENT
Committee structure
Committee documents
Advanced search
Clipboard
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

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

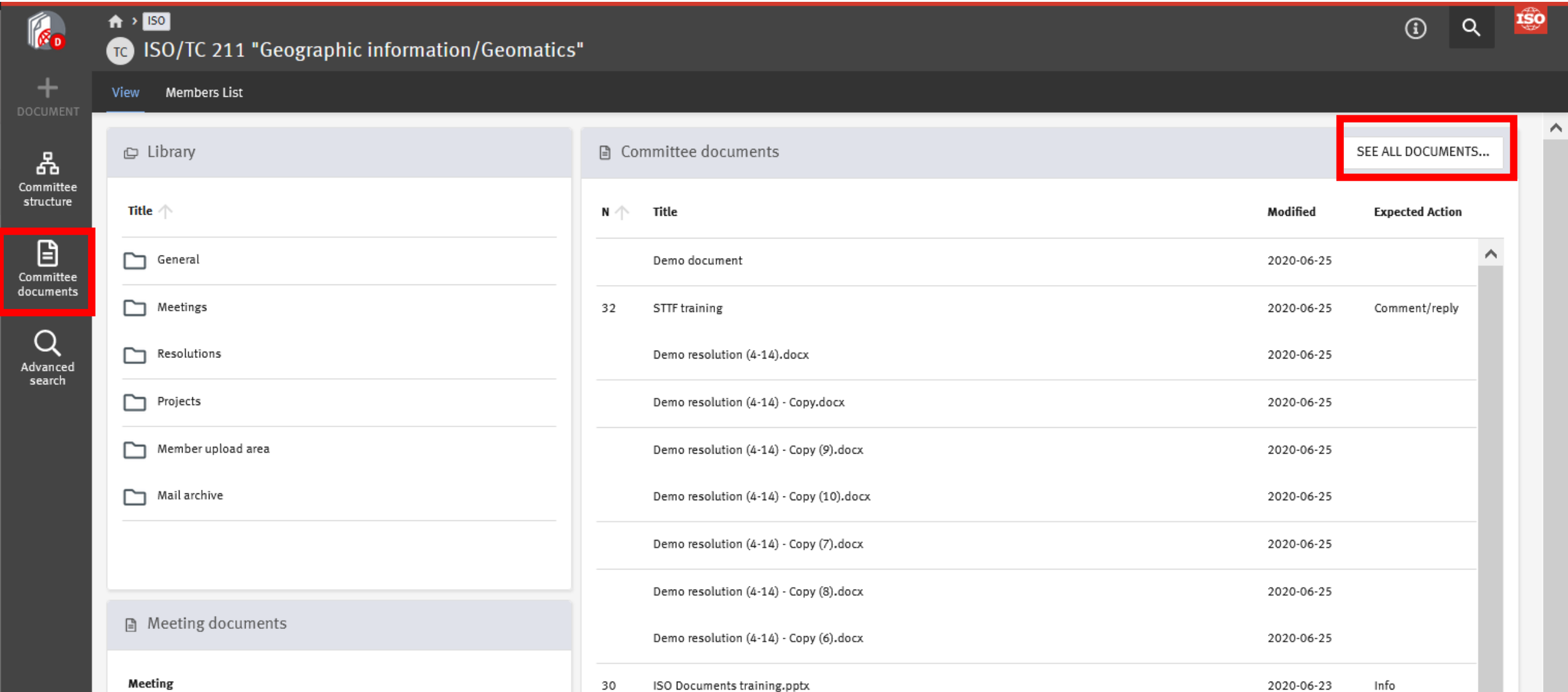
Folder name	Document types
Administration (restricted)	File (non-N document)
General	Ballot, General, Meeting, Project, Decision documents
Meetings	Meeting documents
Decisions	Decision documents
Projects	Ballot and Project documents
Member upload area	File (non-N document)
Mail archive	Email (automatically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

Document types : eCommittees vs CEN Documents

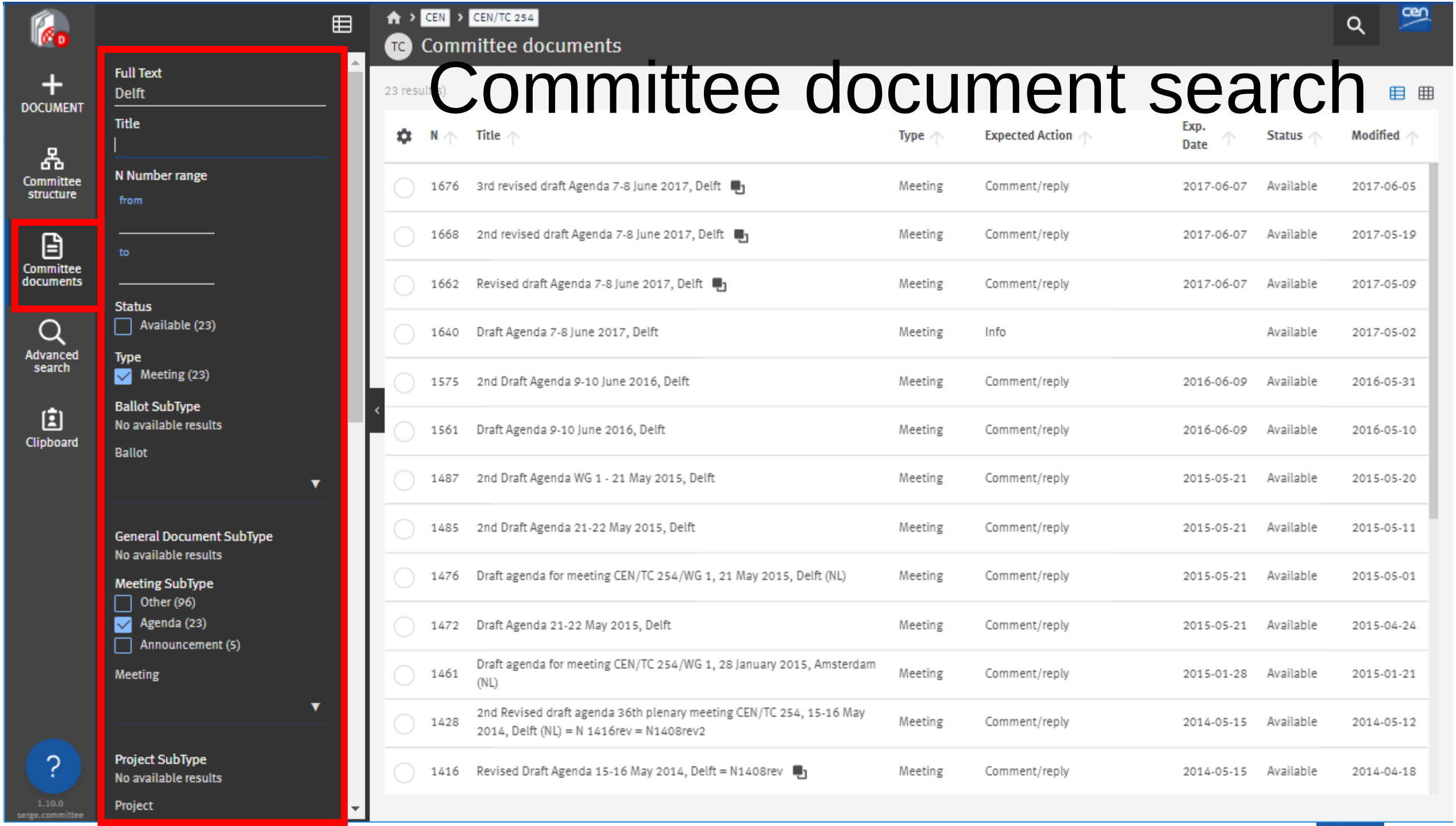
eCommittees types	CEN Documents types
Public document	General
Other Committee Document	General
Draft	Project
Meeting	Meeting
Resolution	Decision
Ballot	Ballot

5. Search & download

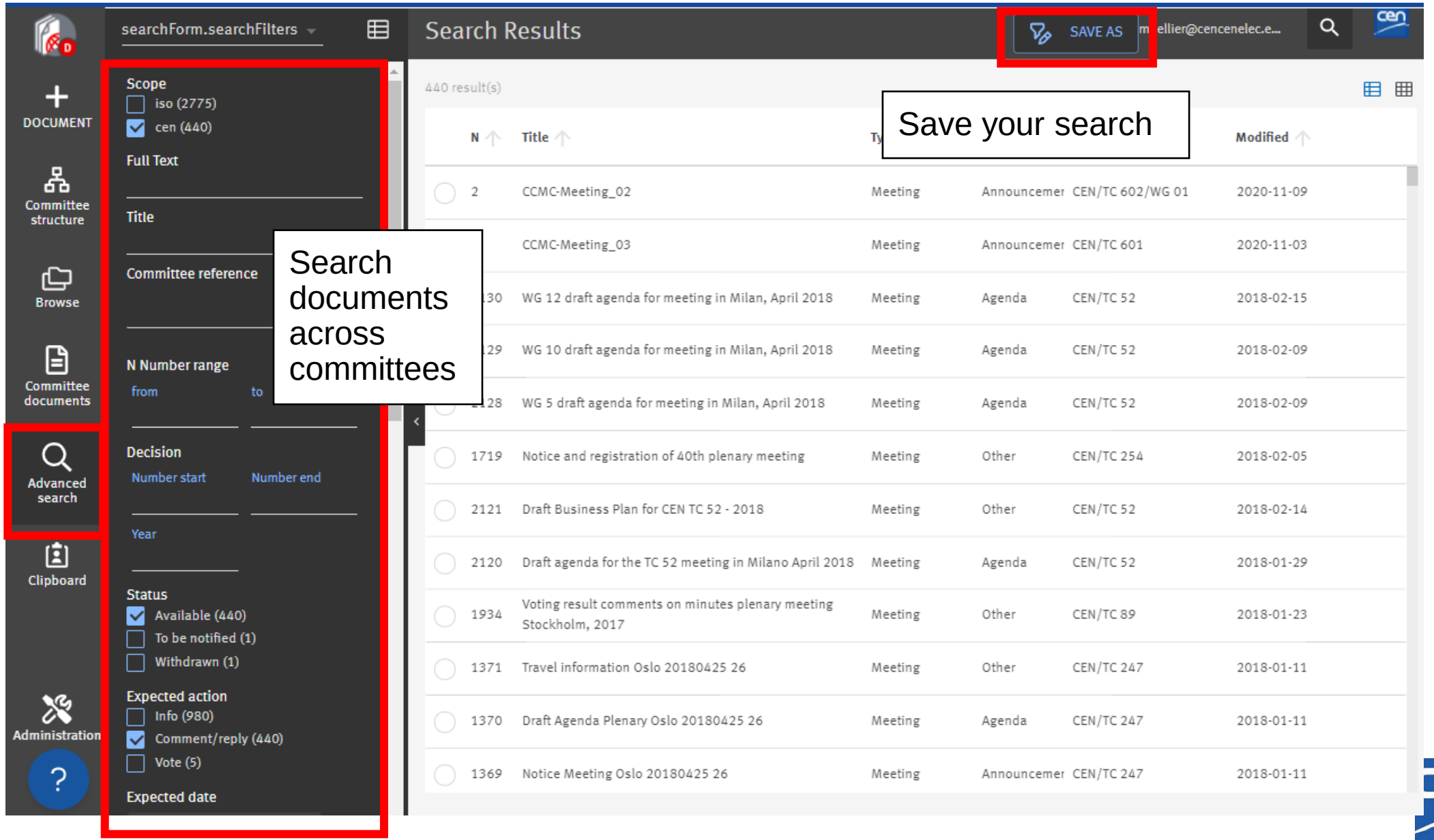
Committee document search



Committee document search

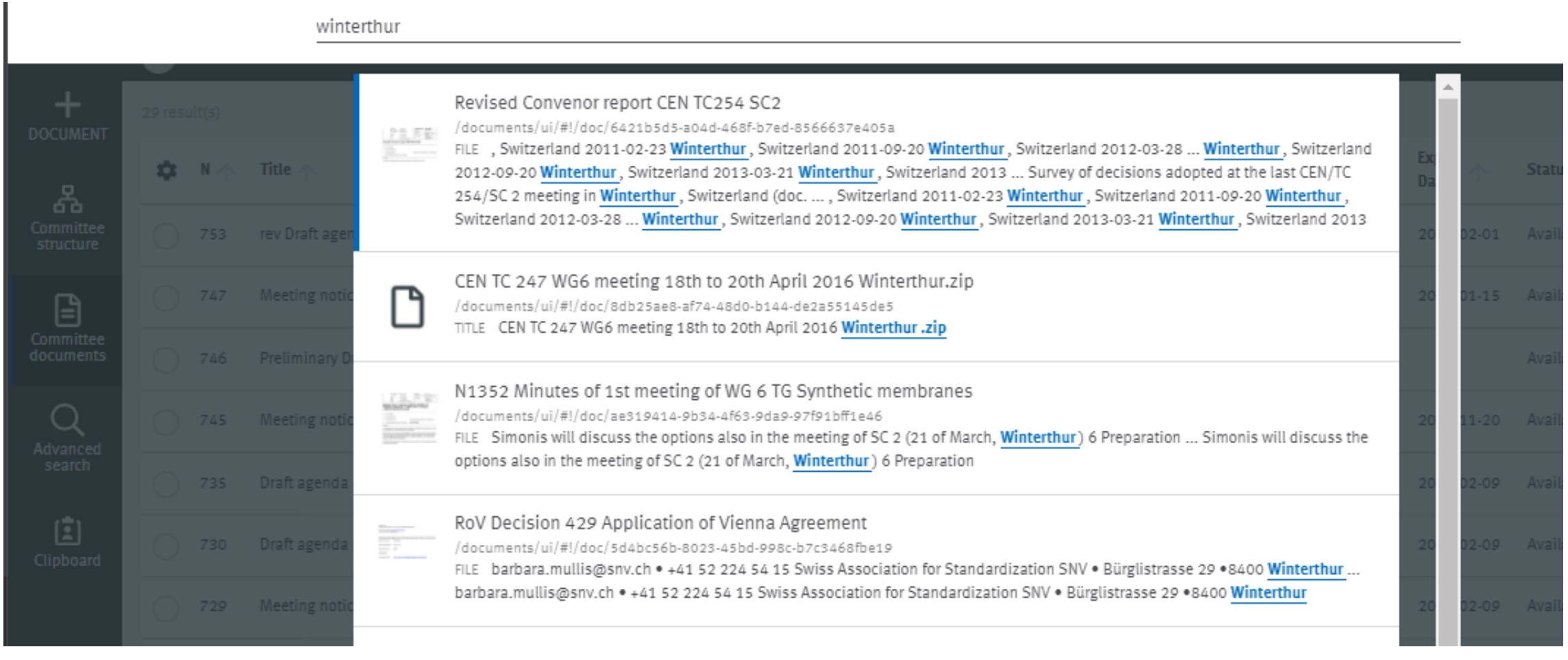


Advanced search & save search

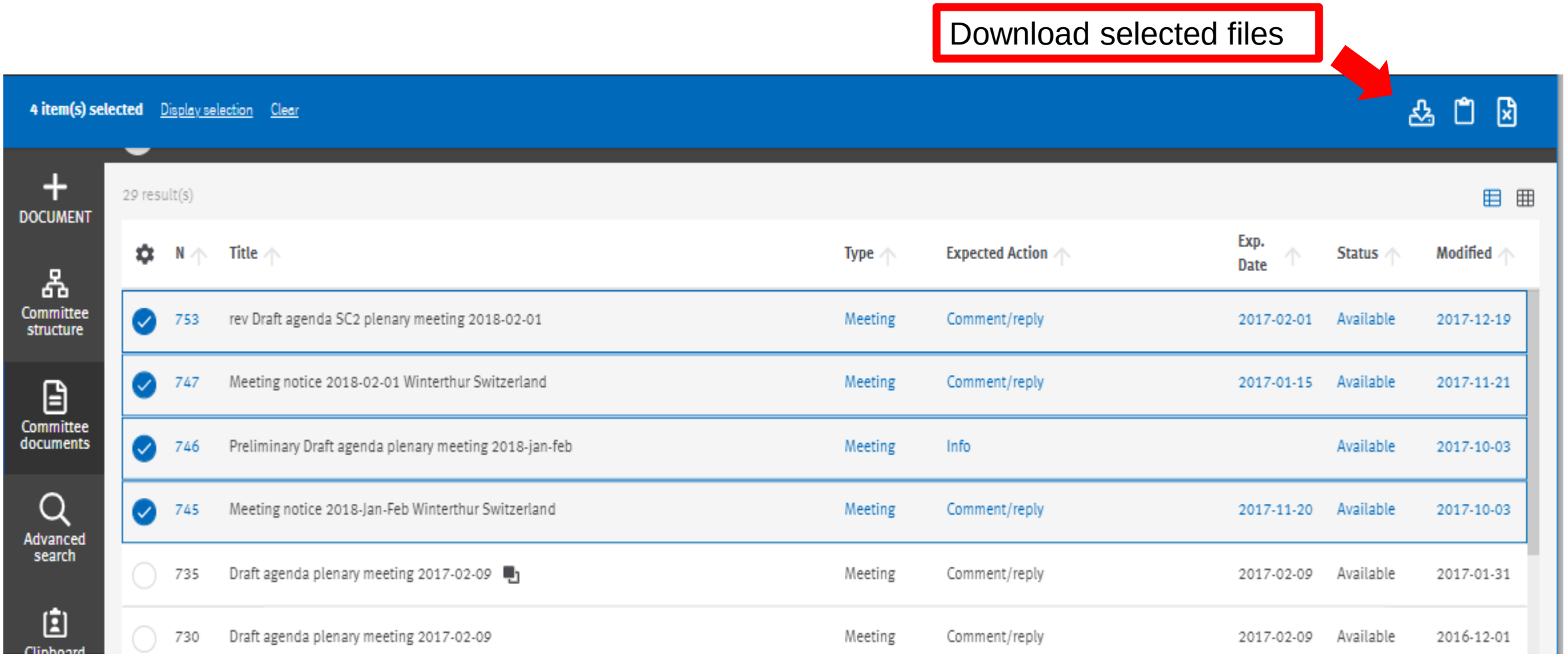


Quick search

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



QR code: from print to digital

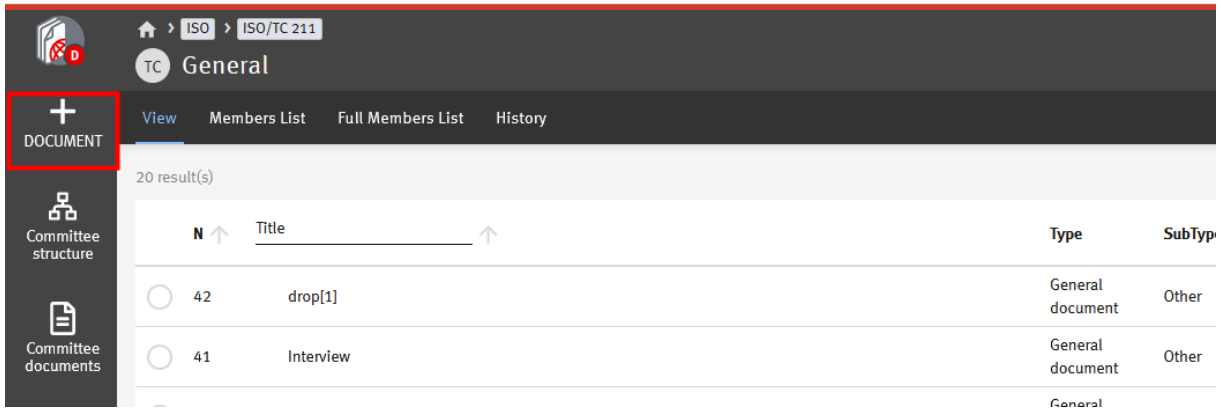
Scan it and you are taken to the online digital version

Dynamically generated in your cover pages

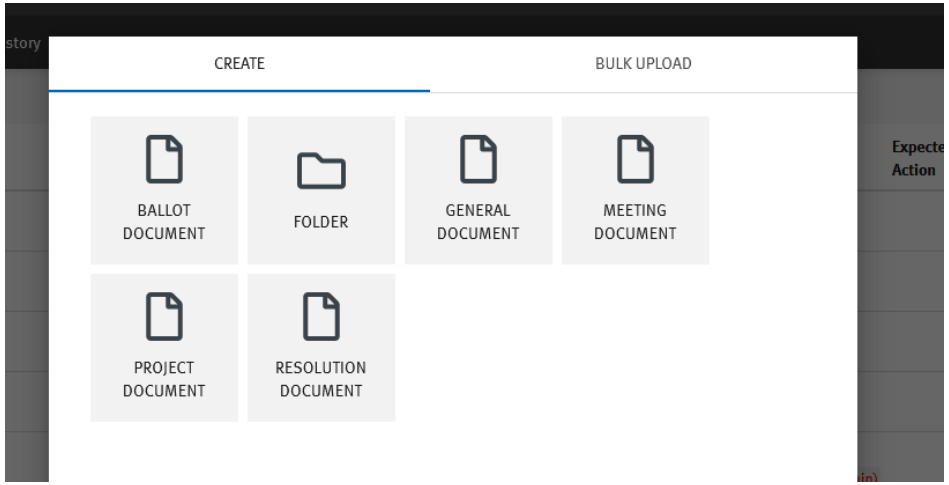
6. Manage documents

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

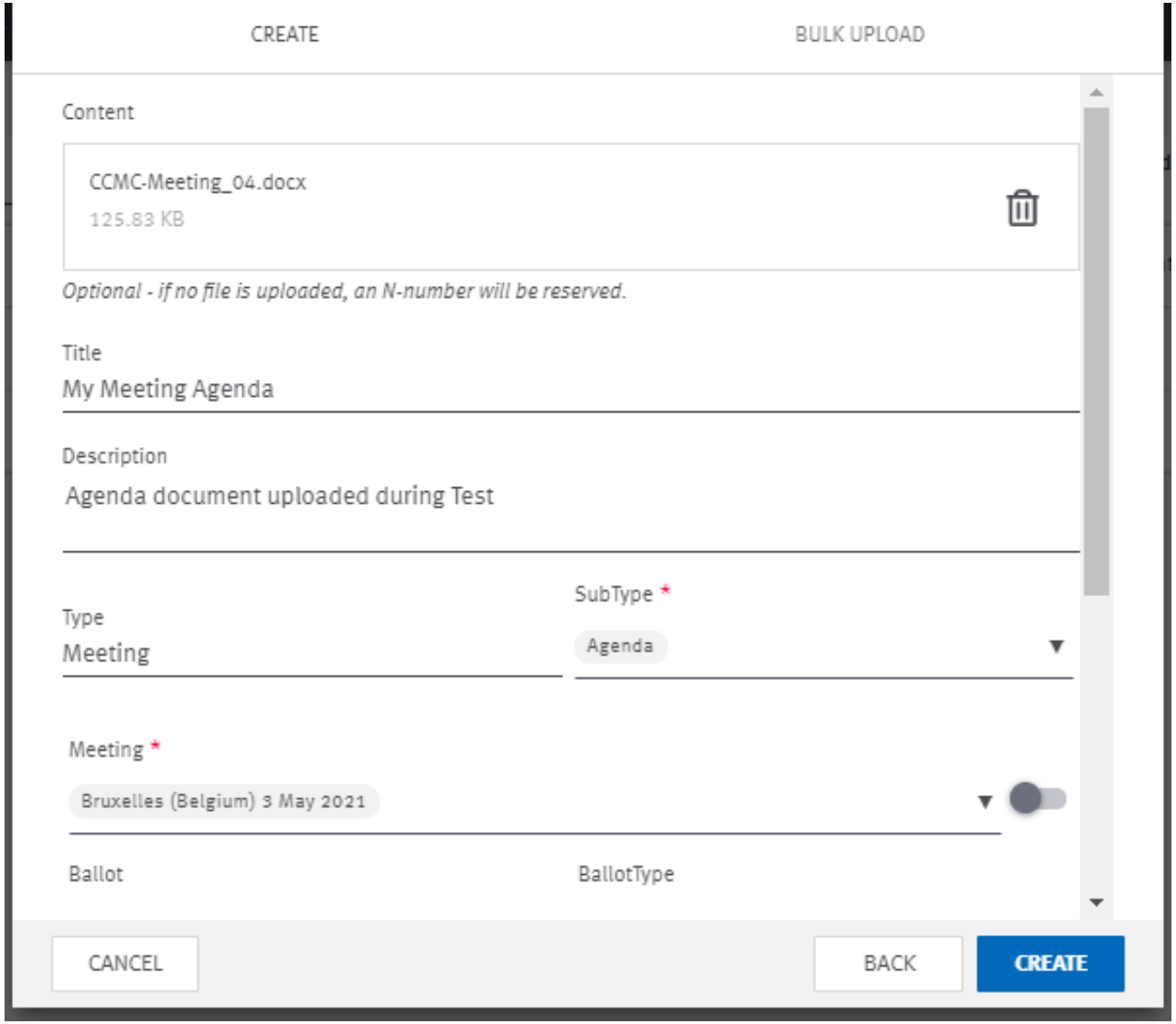


- Type of allowed Document depends on target Folder
- The type of document you select is important as it will drive the metadata displayed

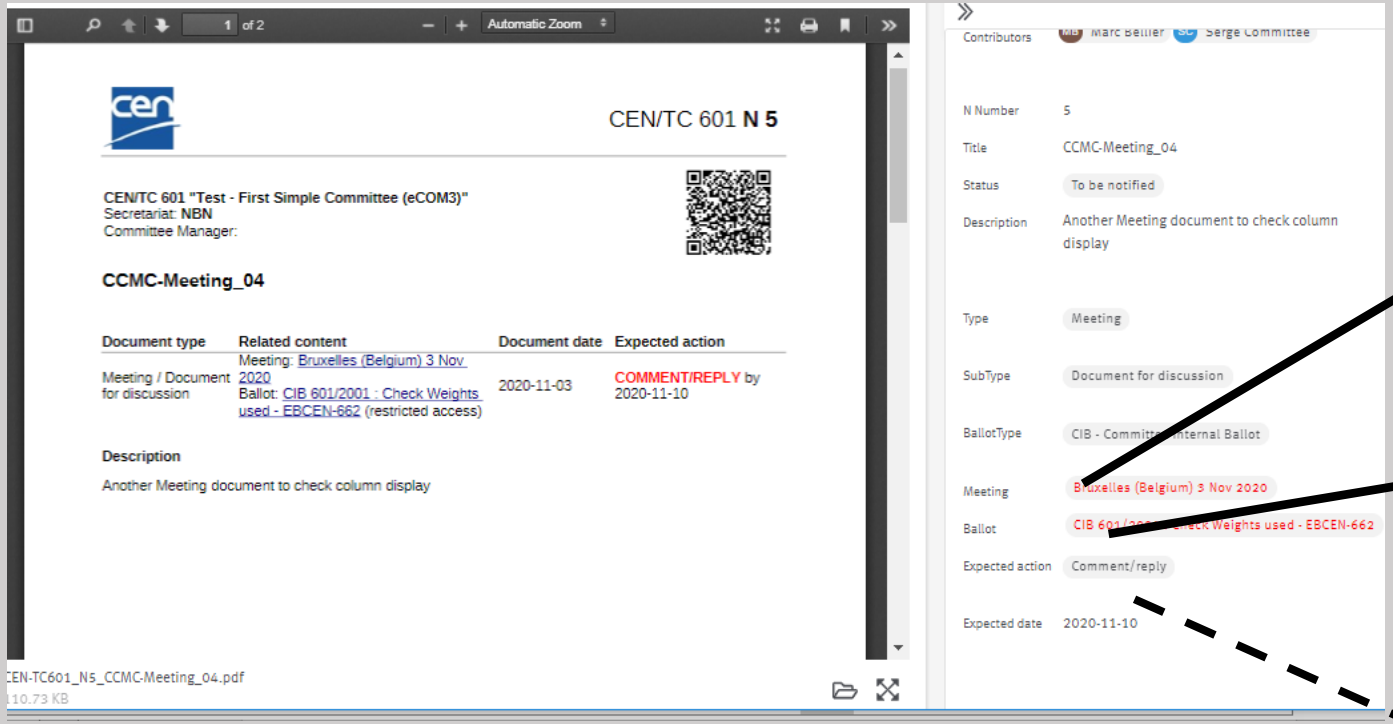
Create a document

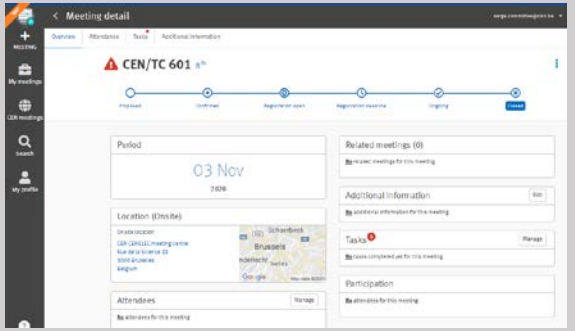
3. Fill in the metadata

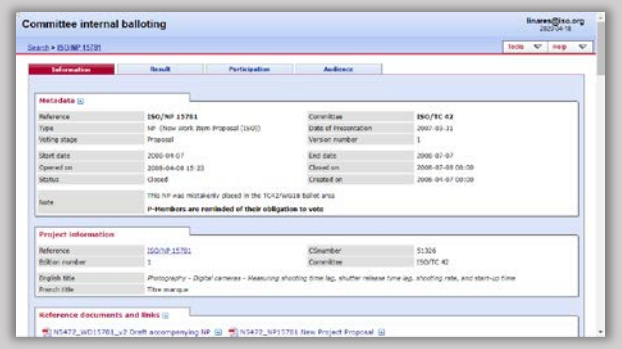
Here, the Meeting document type allows you to link the document to an existing meeting



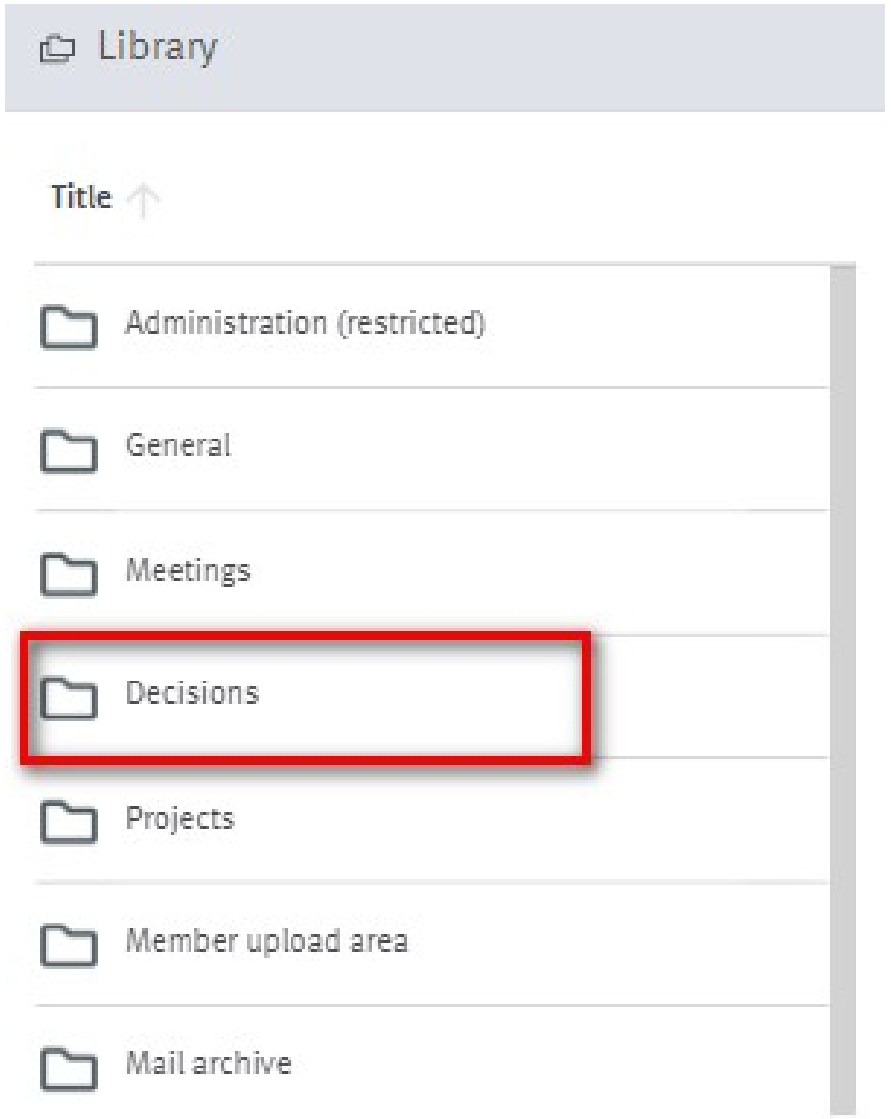
Navigate to related content







CEN Projects



Decisions

Replaces Resolution document type from eCommittees

Can be linked to:

- Ballot
- Meeting
- *Project (→ later)*

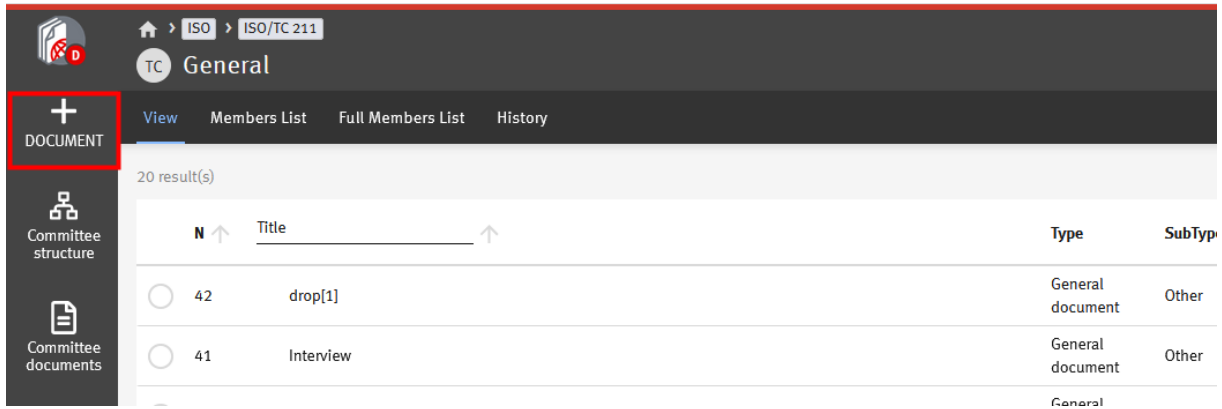
Searchable by
decision number and year

1 Doc may contain N Decisions

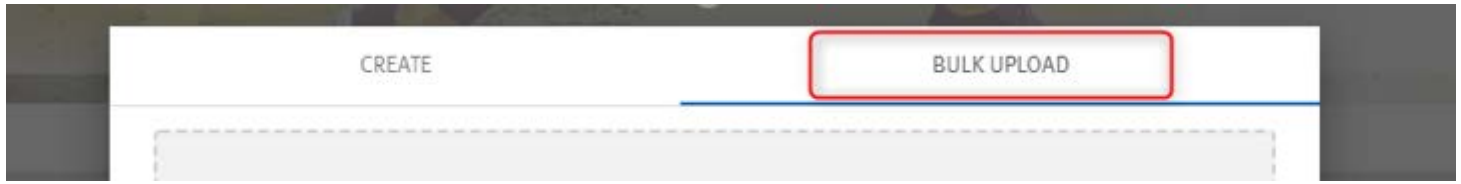
- Start / End numbers

Bulk upload

1. Open the folder in which you wish to add your documents and click on **+DOCUMENT**



2. Select **BULK UPLOAD**

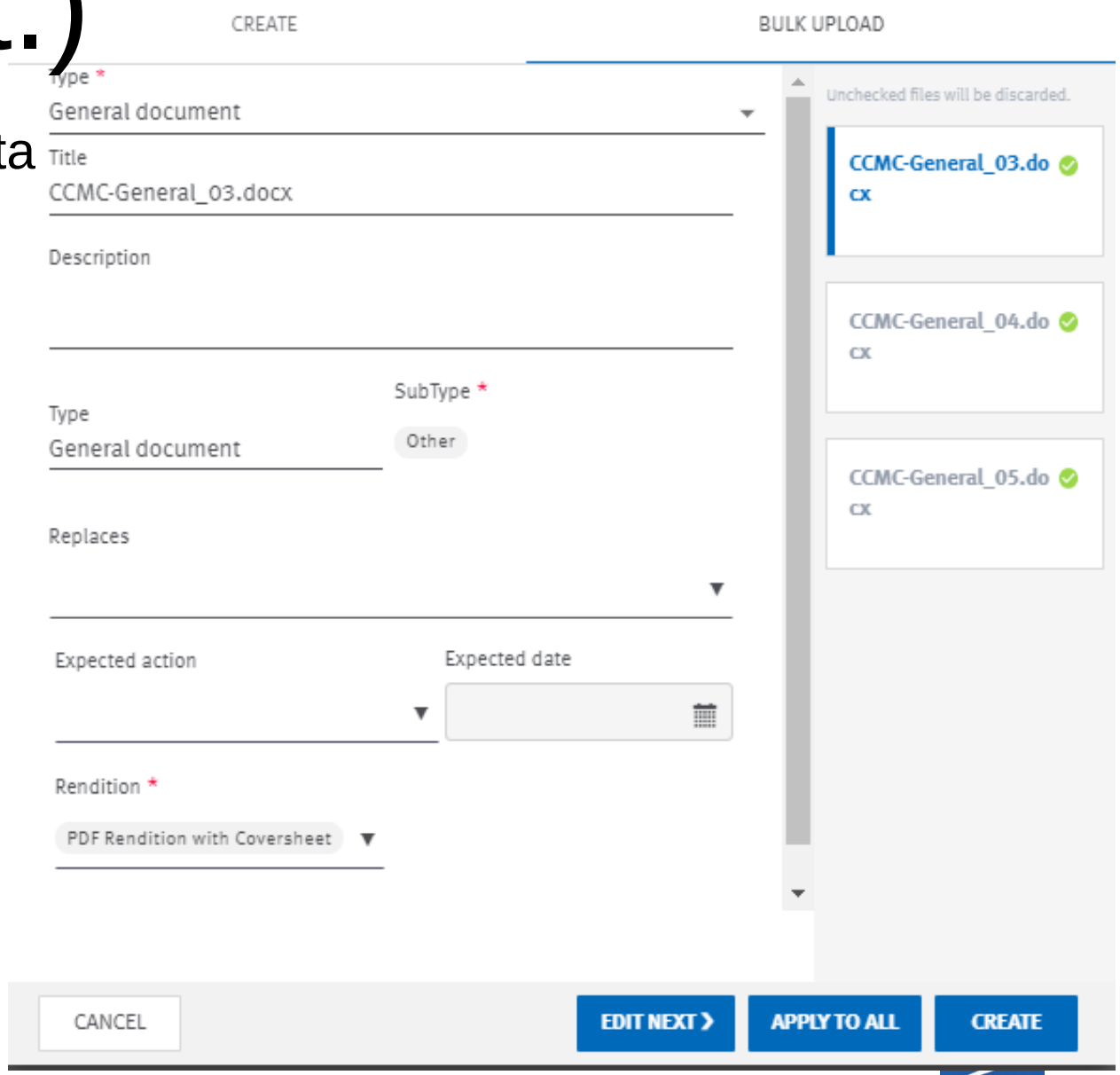


3. Drag & drop your documents, or just click on the text to select your files

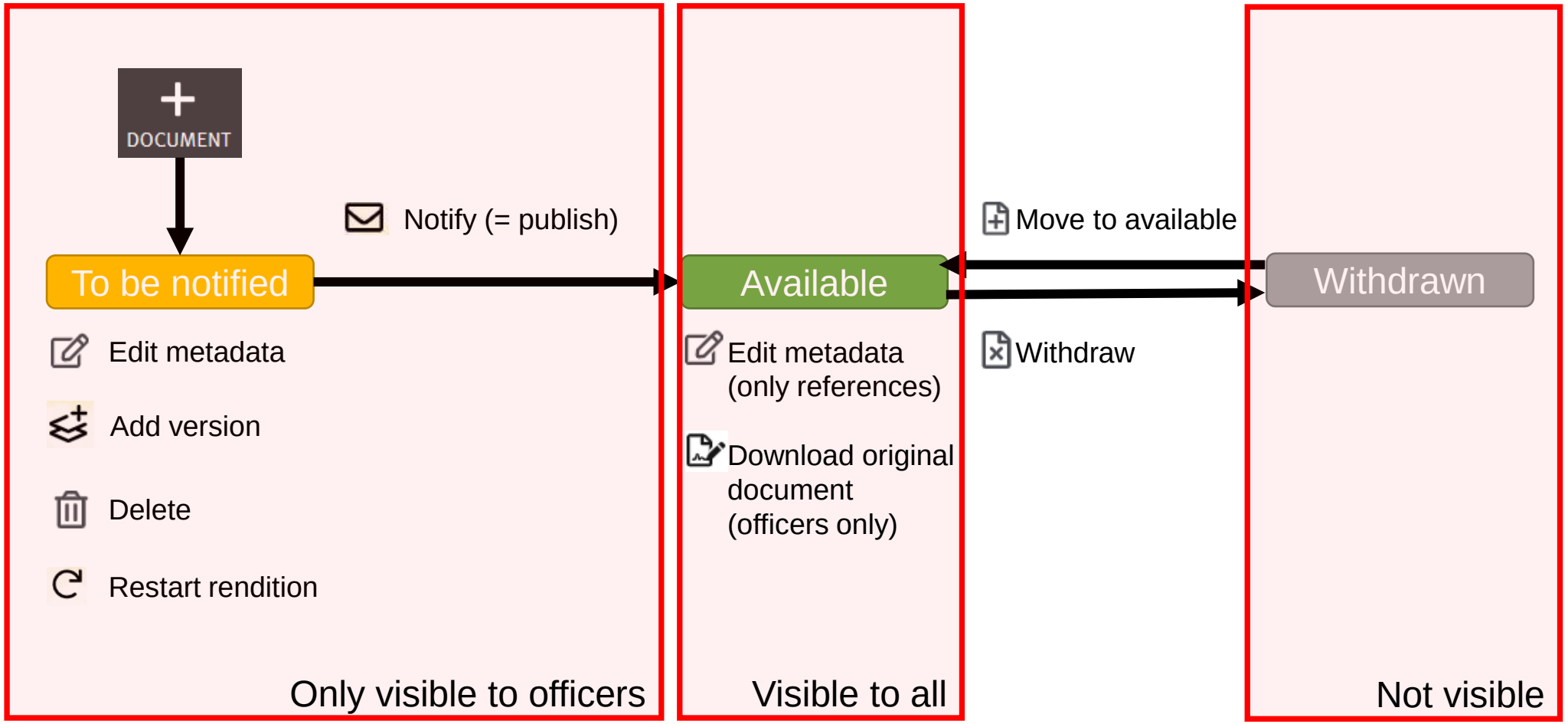
Bulk upload (cont.)

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

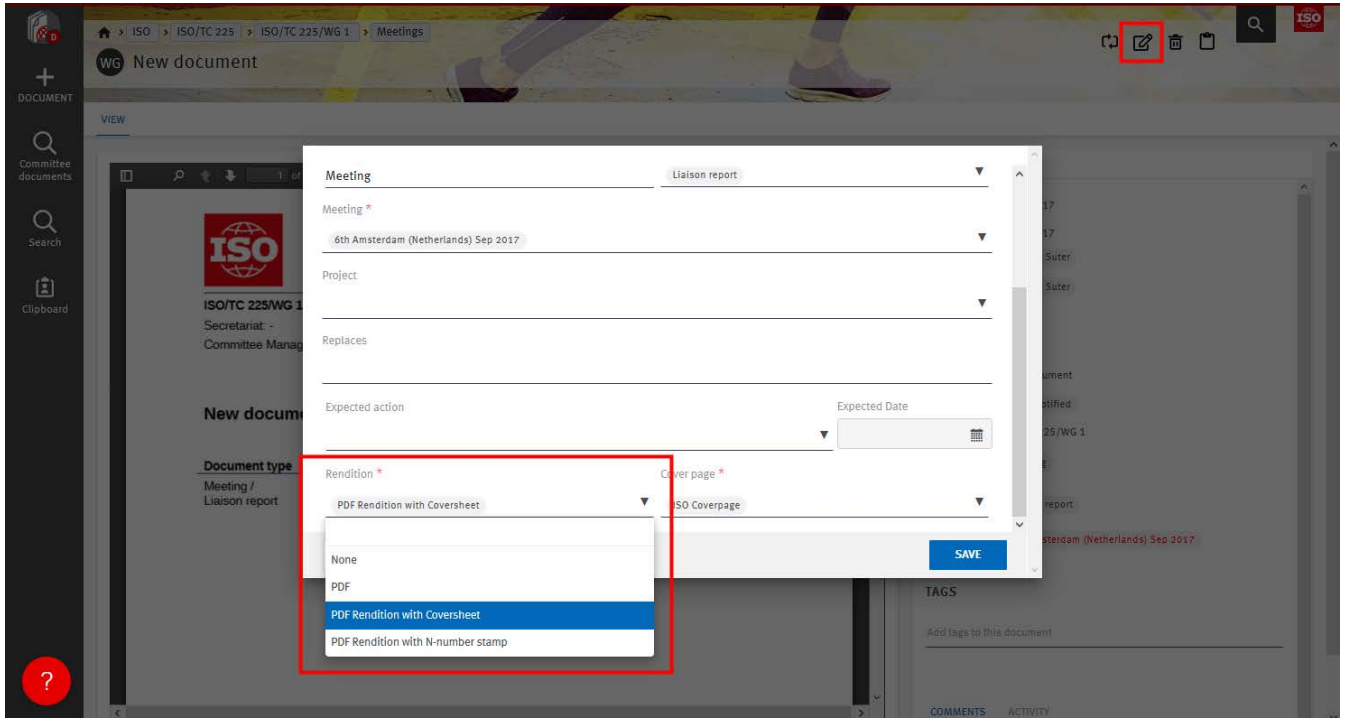
PDF rendition

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

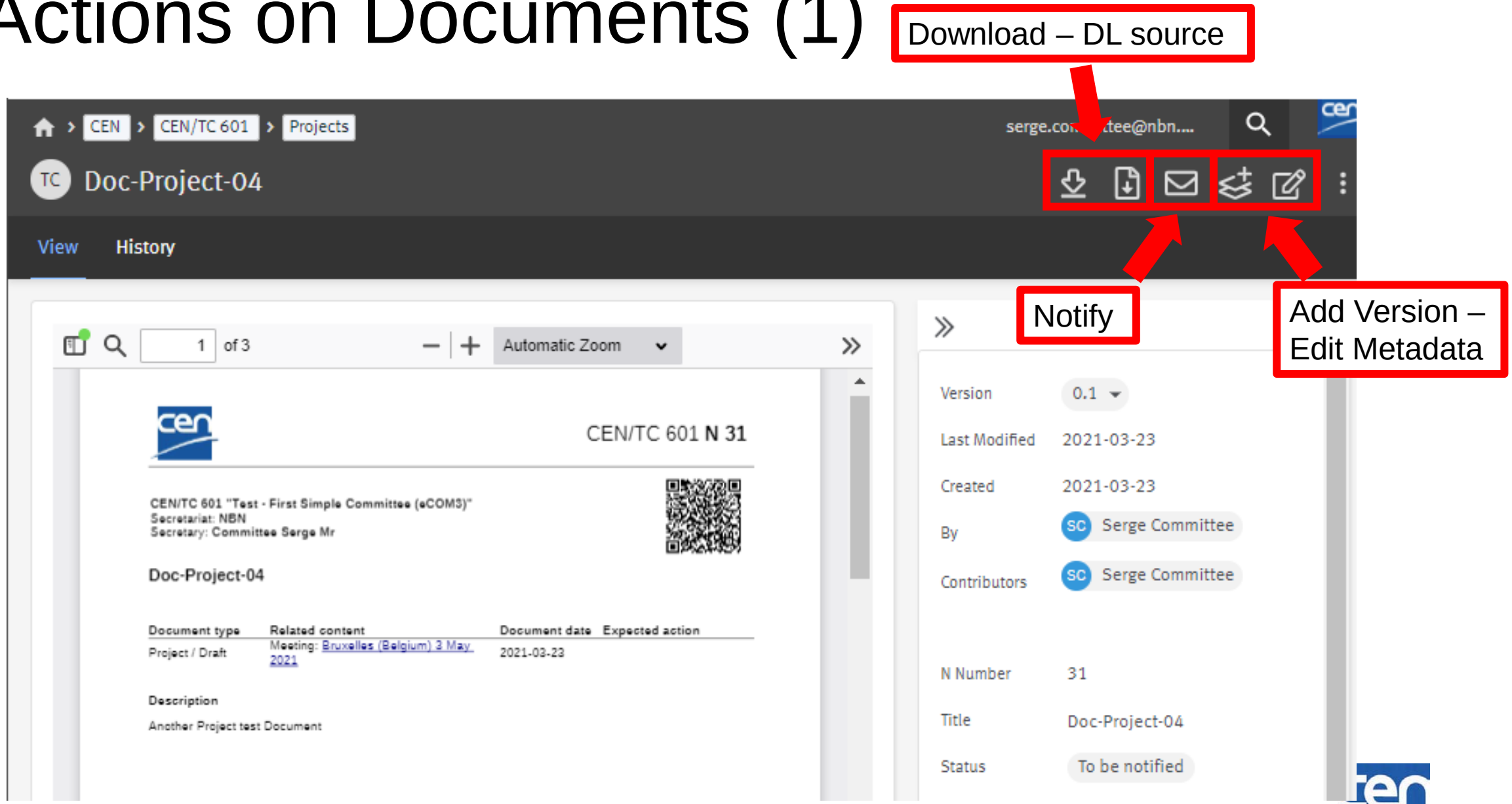
X Protected document, Zip files

Correct rendition error

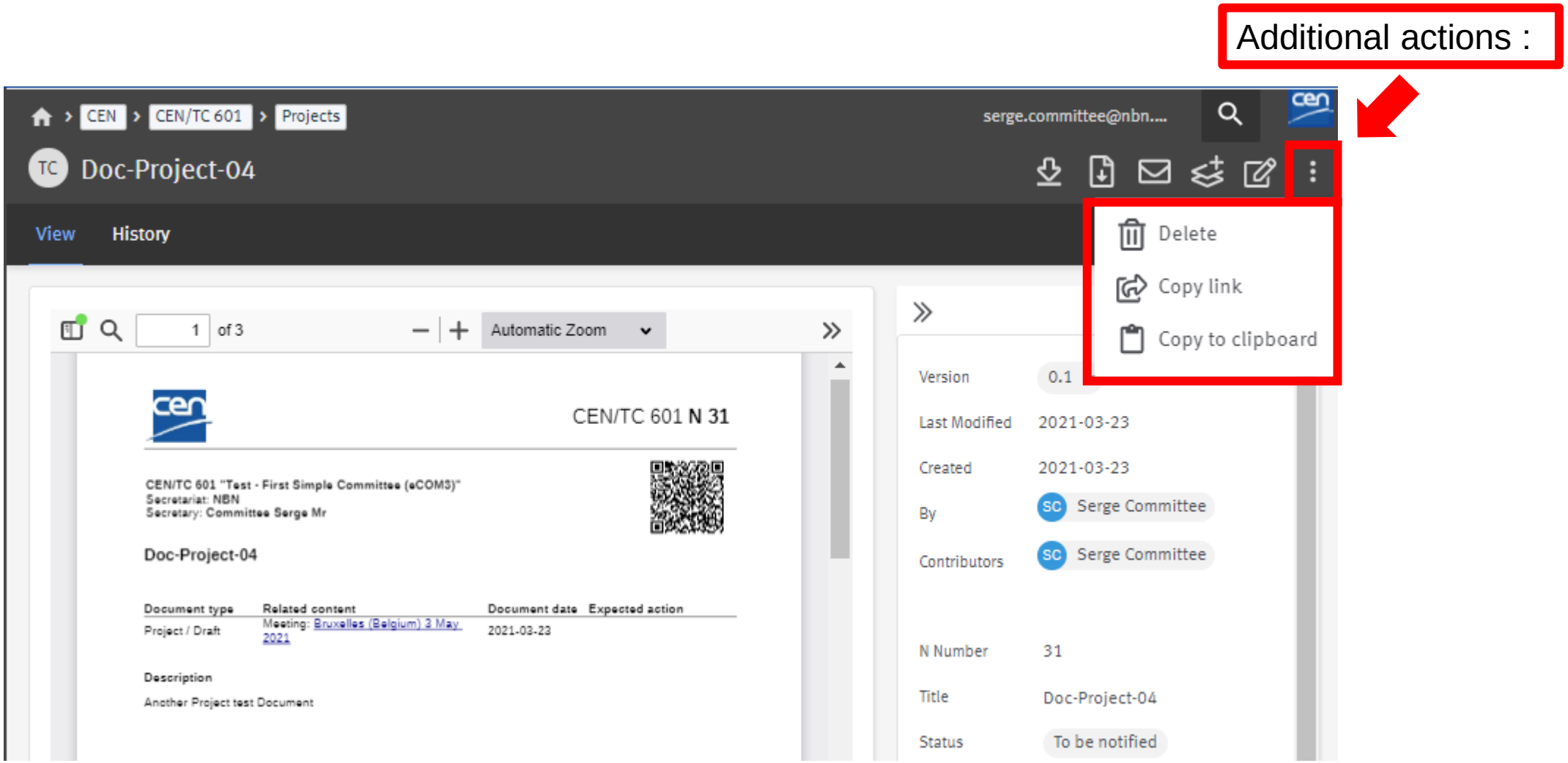
Edit metadata and at the bottom of the form change the rendition to None



Actions on Documents (1)



Actions on Documents (2)



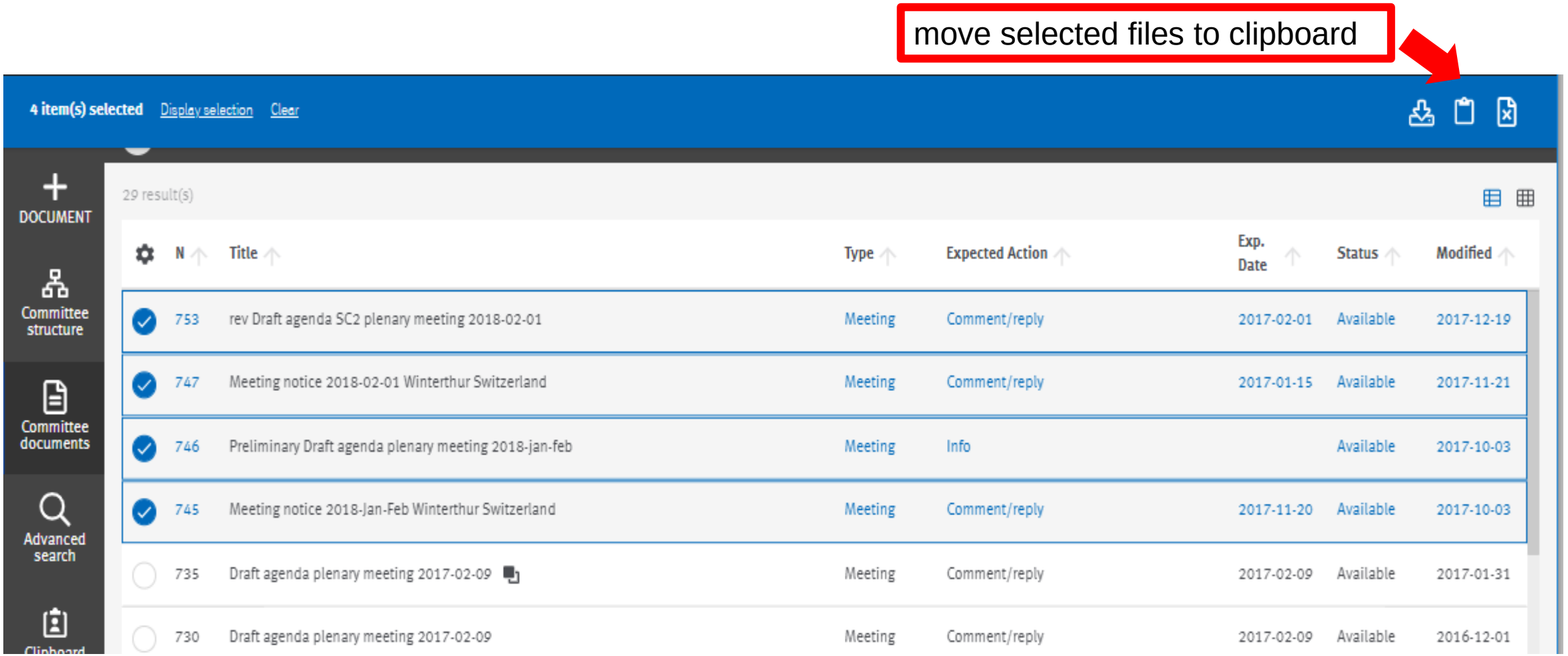
Move documents/folders → Clipboard

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

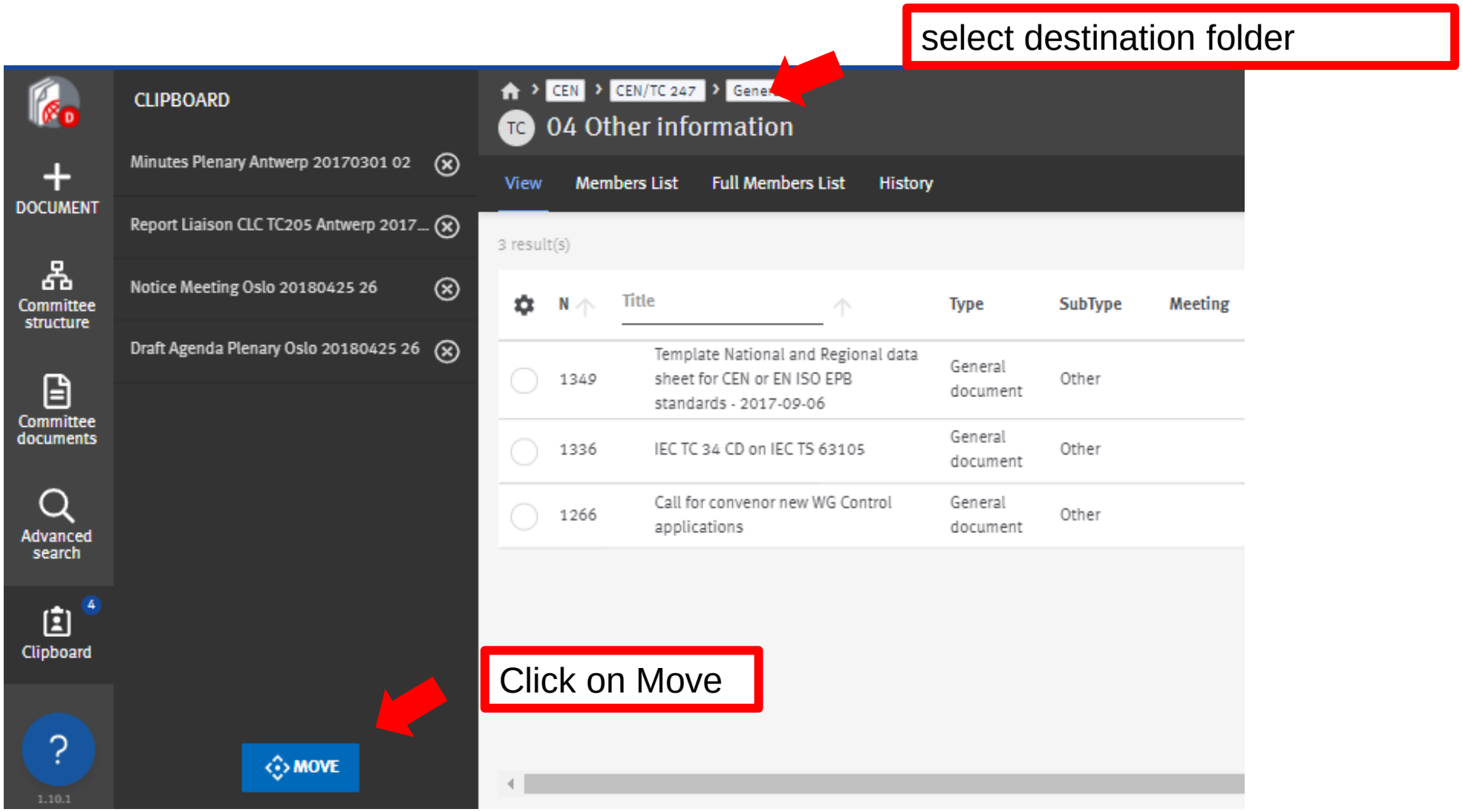
1. Select the document/folder(s) to move
2. Click on Copy to clipboard icon
3. Open the destination folder, then click Move

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 from Clipboard



Notify a document

1 Select the document(s) to be notified

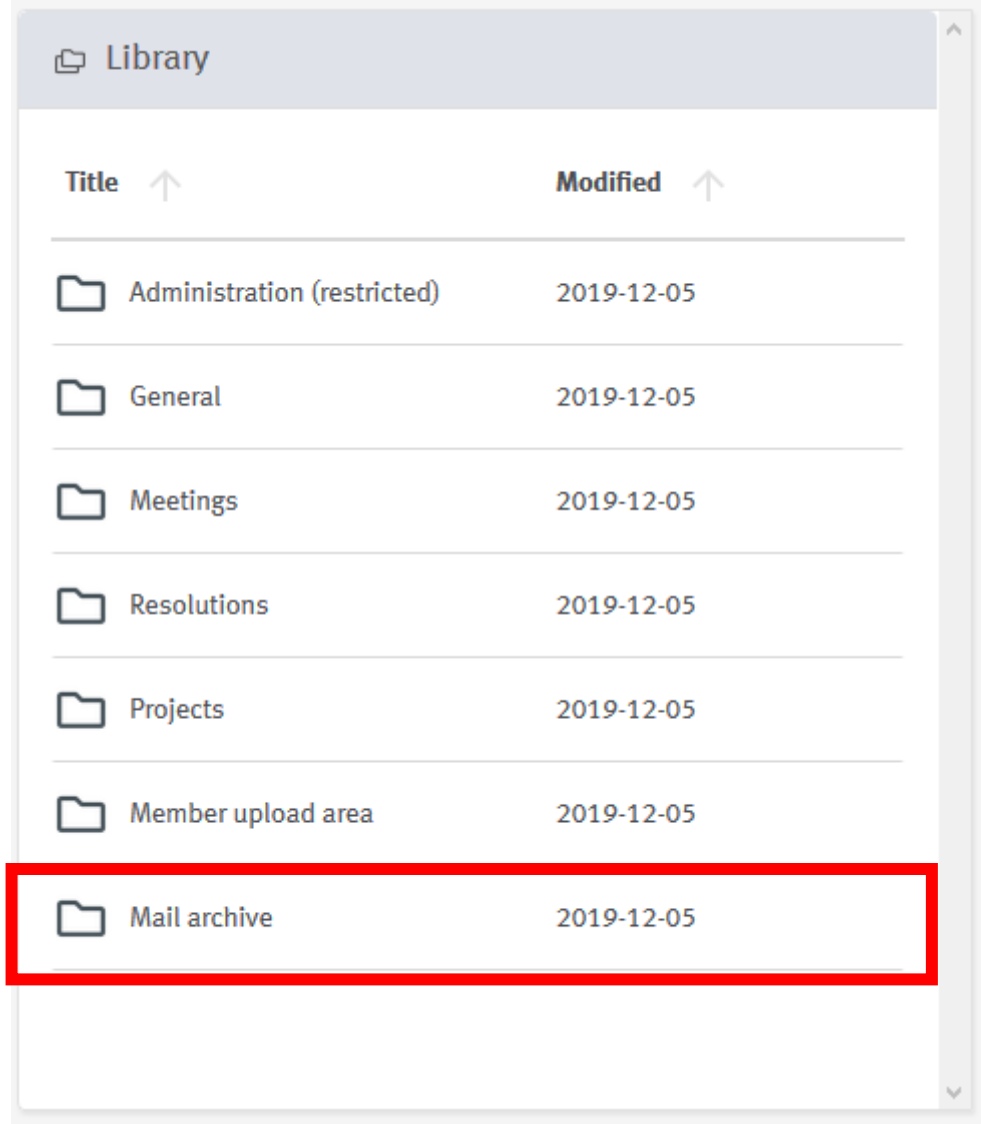
2 Click on the envelope icon from the top right hand-corner

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**

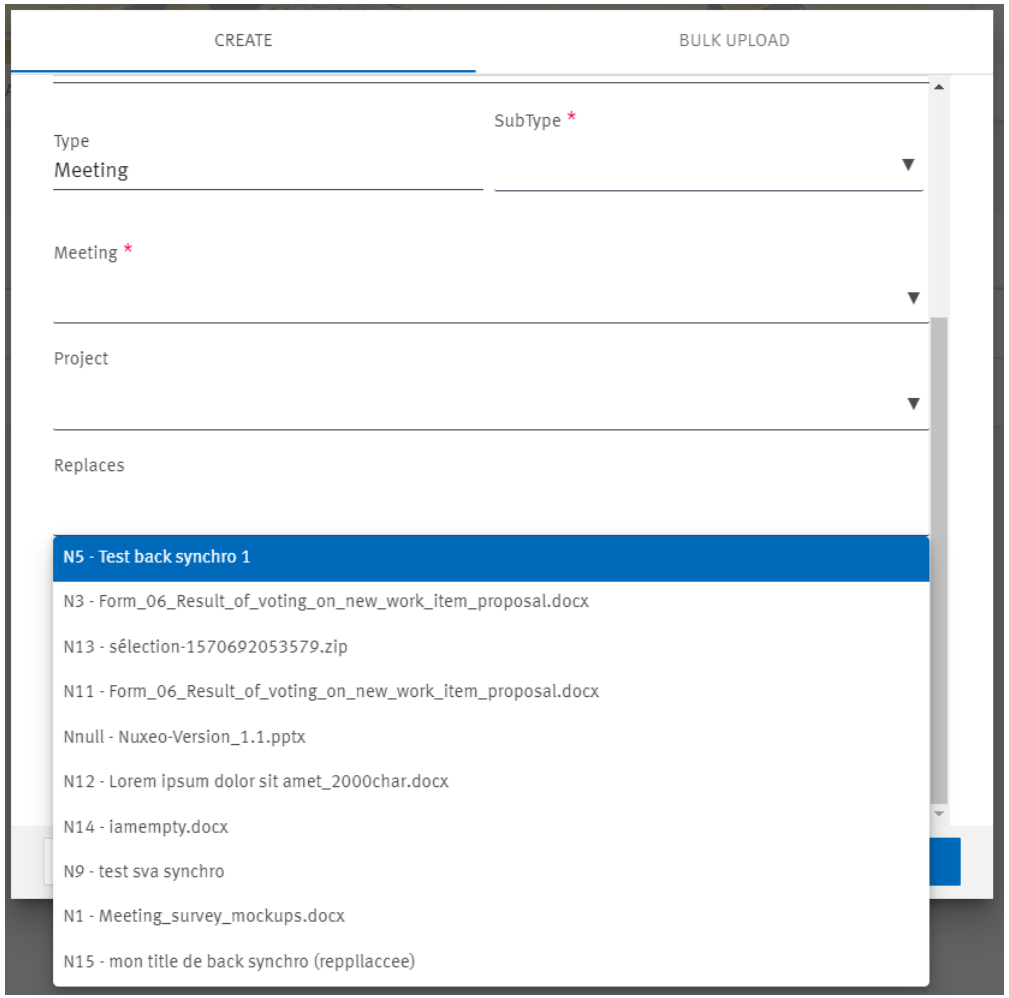
Searchable via the Advanced search

All the audience of the committee can browse the mail archive

READ ONLY!!

*document notifications and email to members

Replace a document

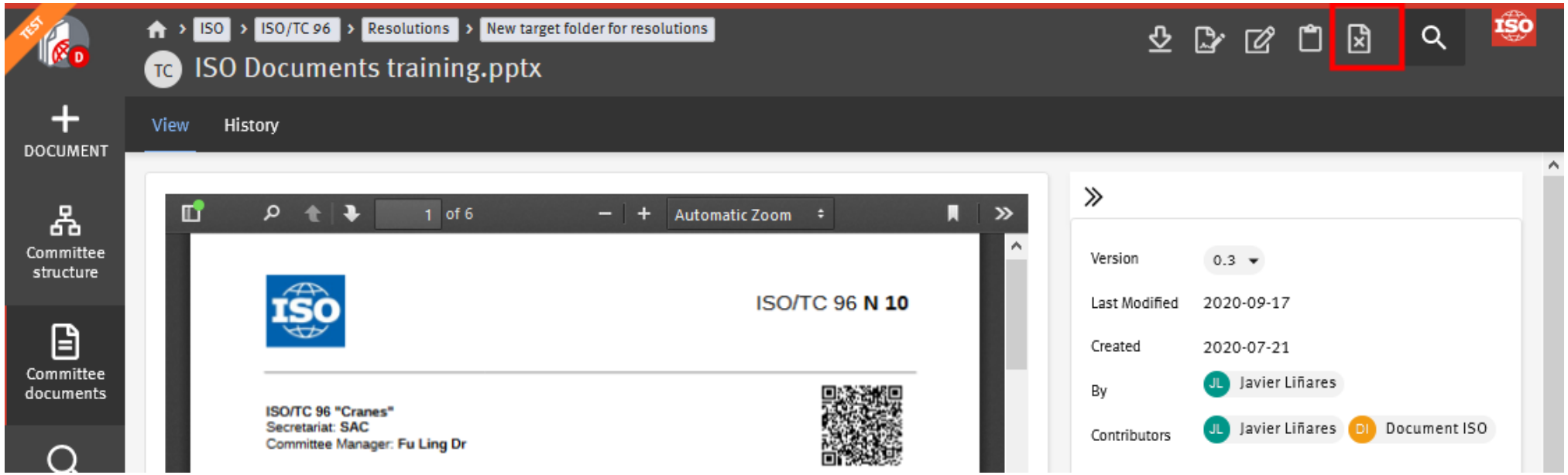


In the document creation screen click on **Replaces**.

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

Withdraw a document

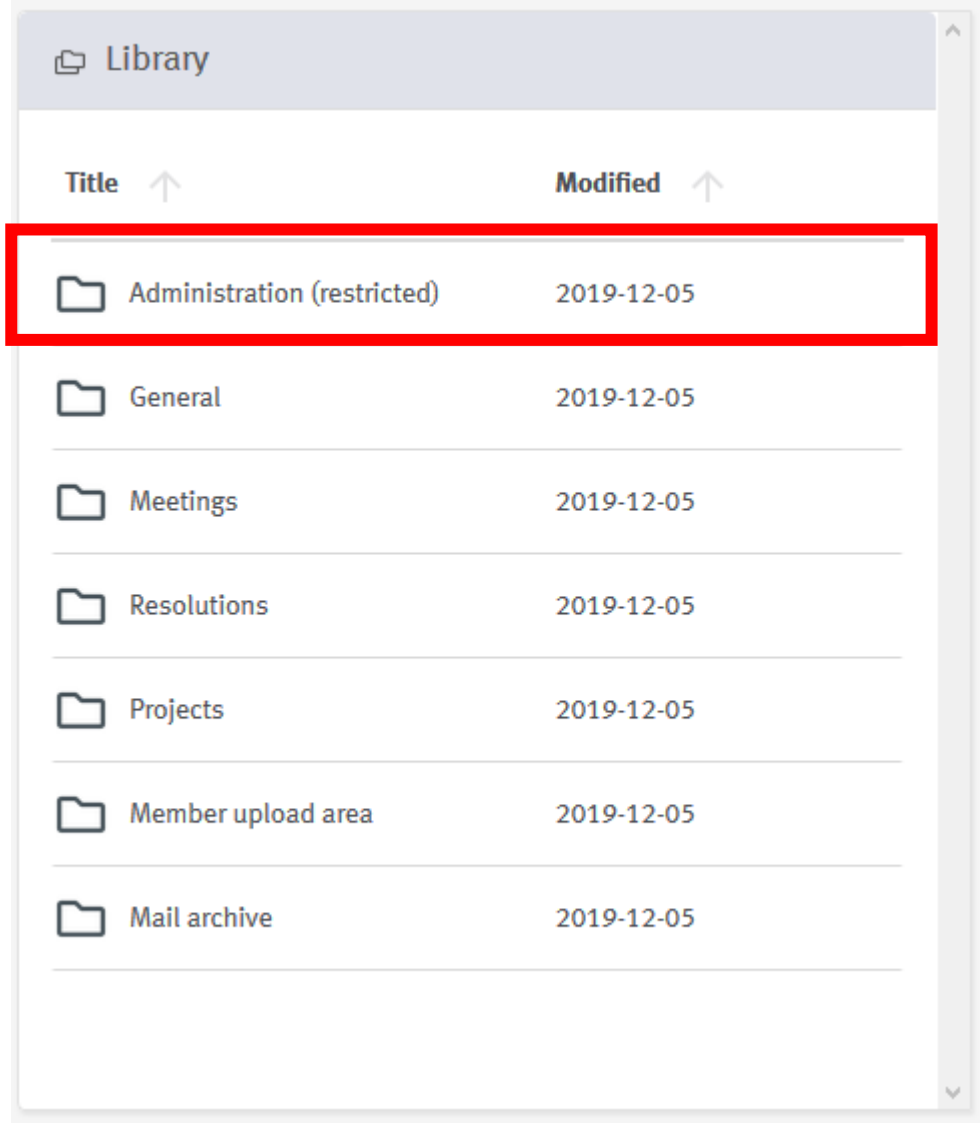
Open the document details page and click on Cross icon



Withdrawn documents can no longer be downloaded nor previewed by anyone, <u>including Secretaries and Convenors</u>

7. Member upload area & Administration folders

Administration (restricted)



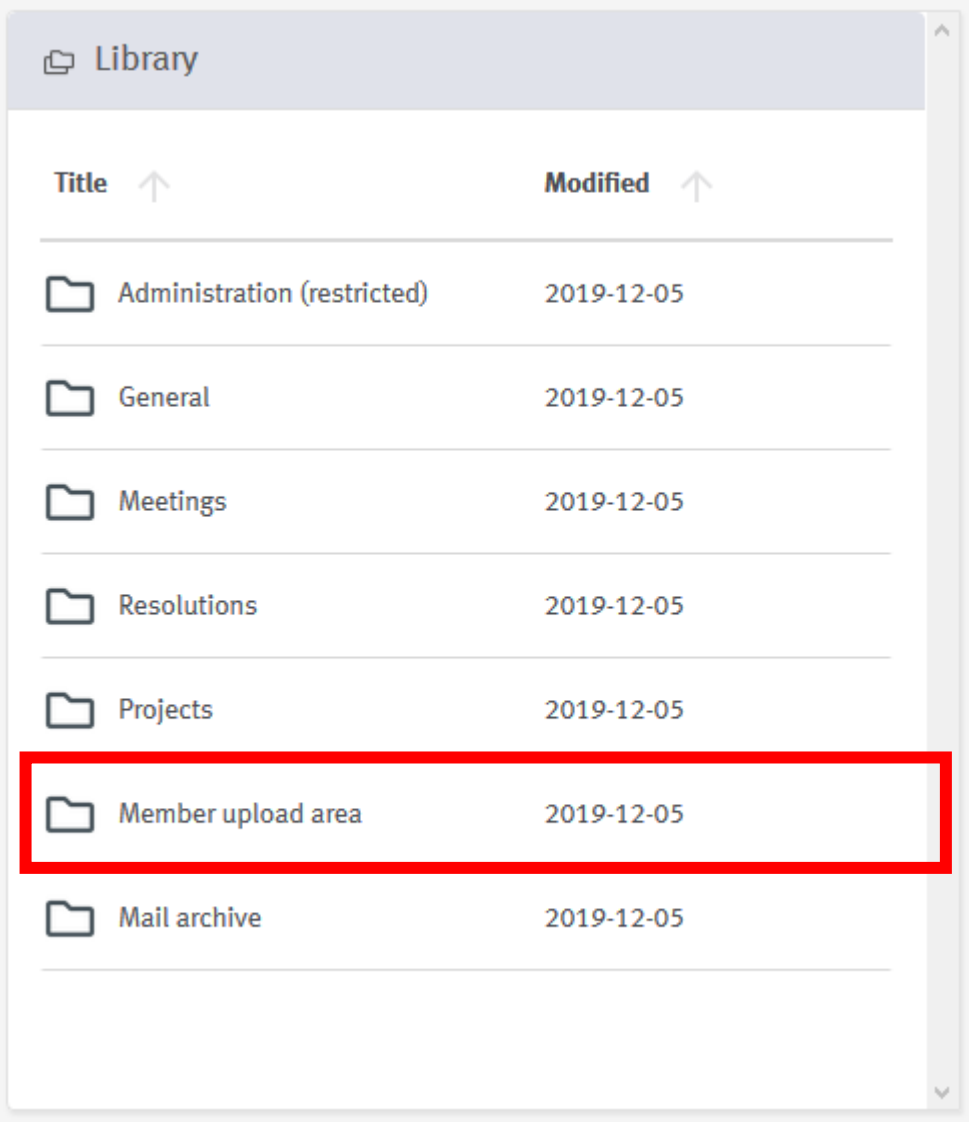
Working area for Managers

= 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

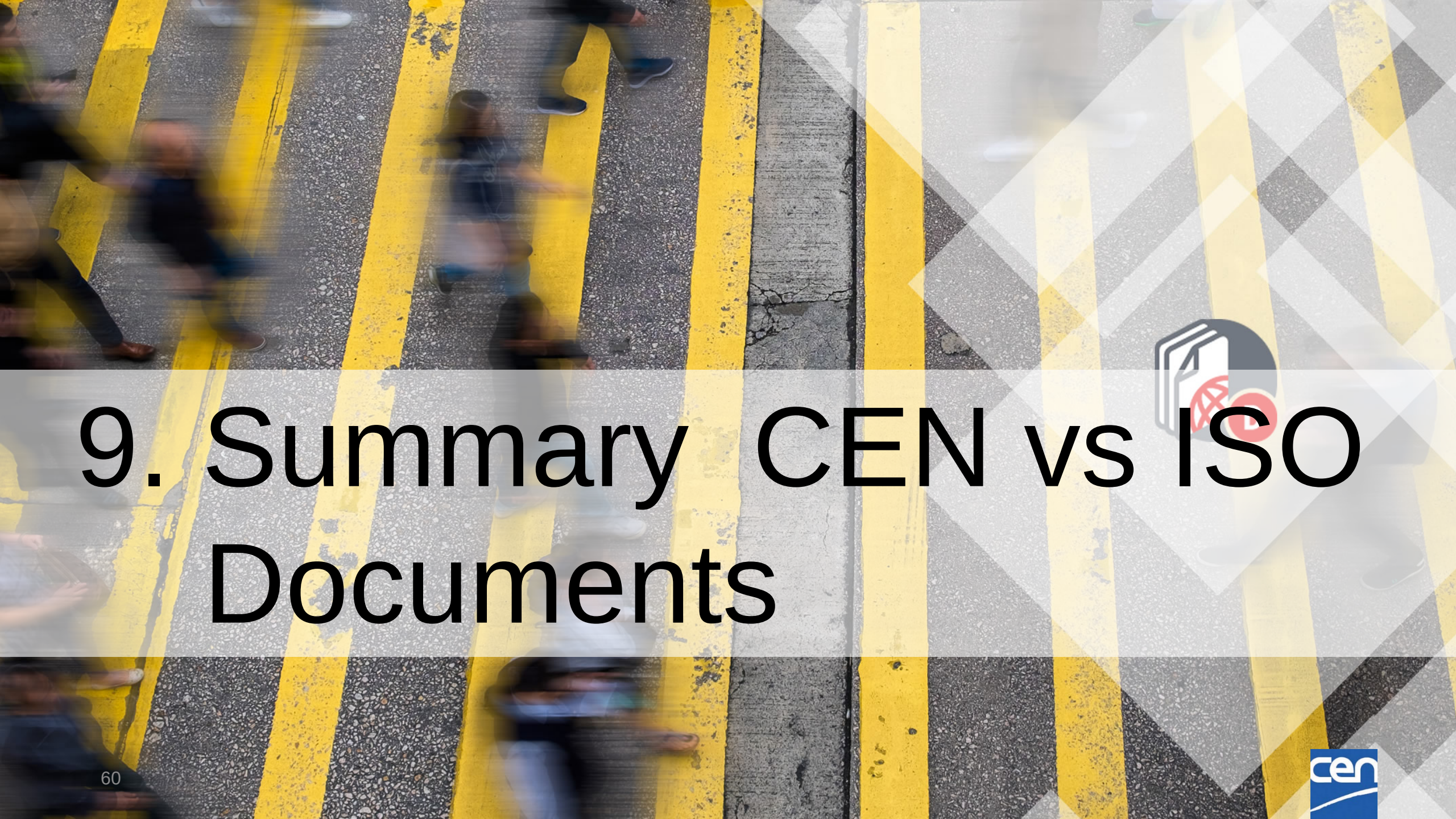
eCommittees vs CEN Documents

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 :

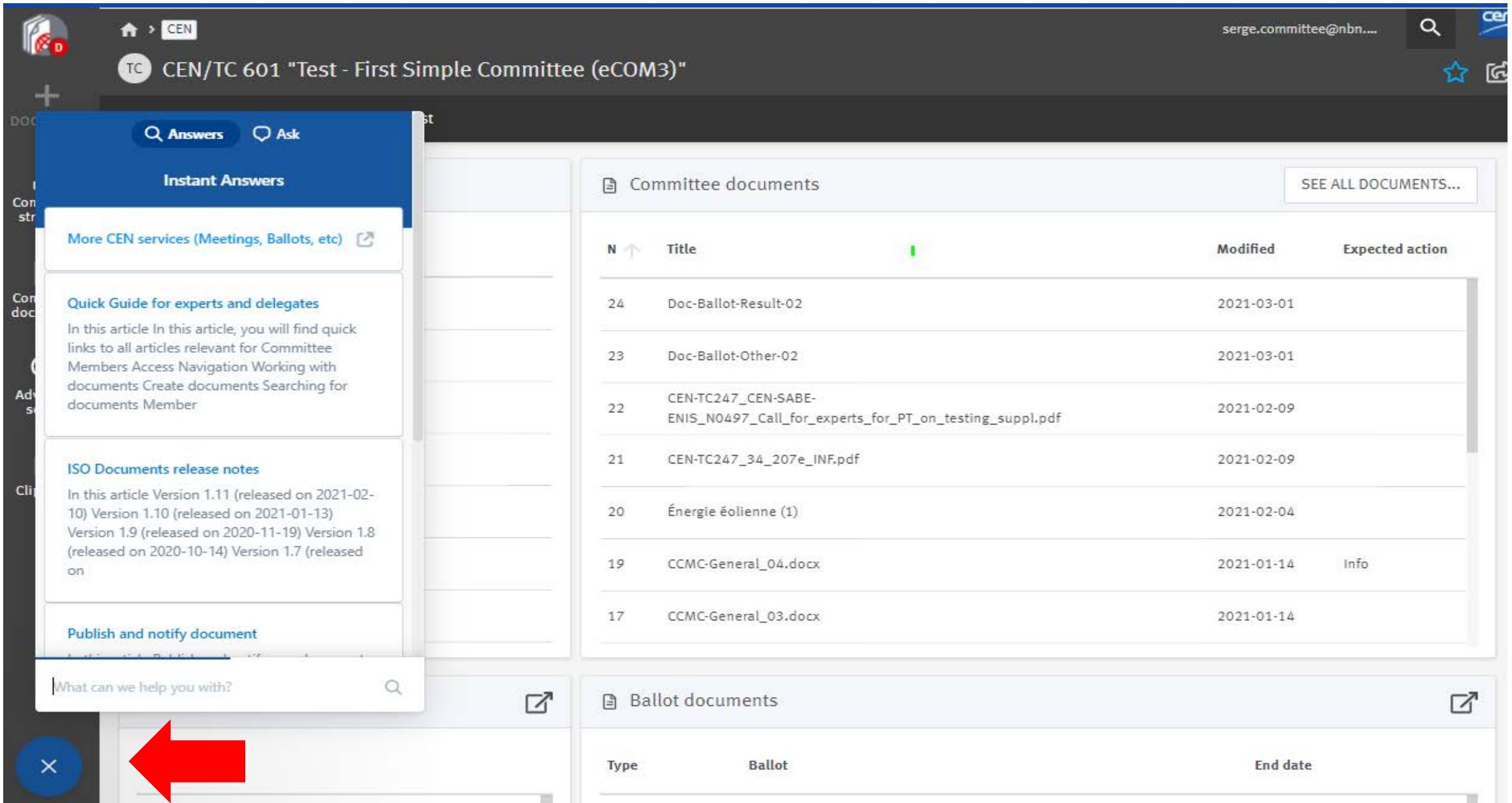
Content Server	**Nuxeo**
00. Secretariat workspace	Administration (restricted)
01. Public information	For CEN : Documents in this folder will be migrated to folder 'Administration' (in subfolder named 'Reference Information')
02. General committee documents (N)	General (N)
03. Meetings (N)	Meetings (N)
	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)

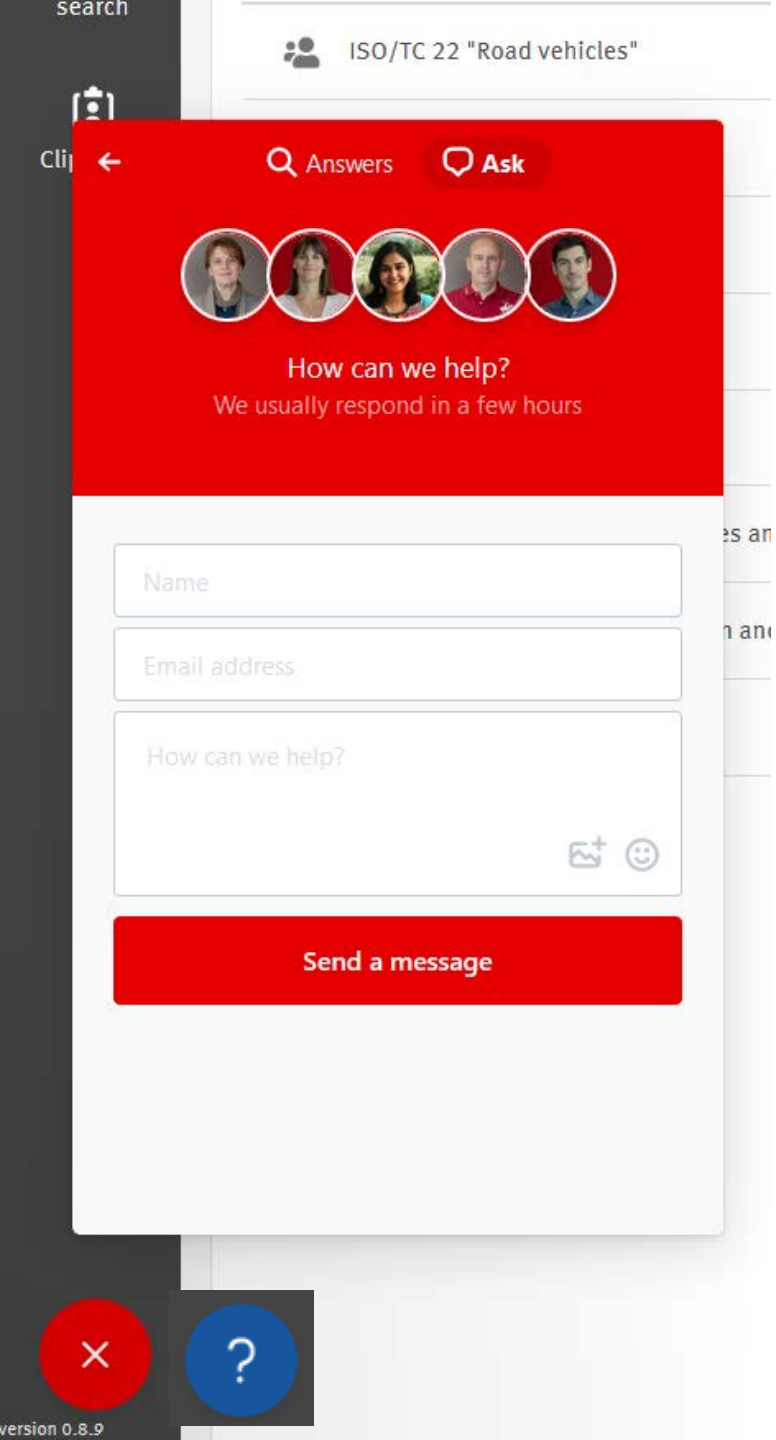
Main Differences – CEN % ISO

- 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

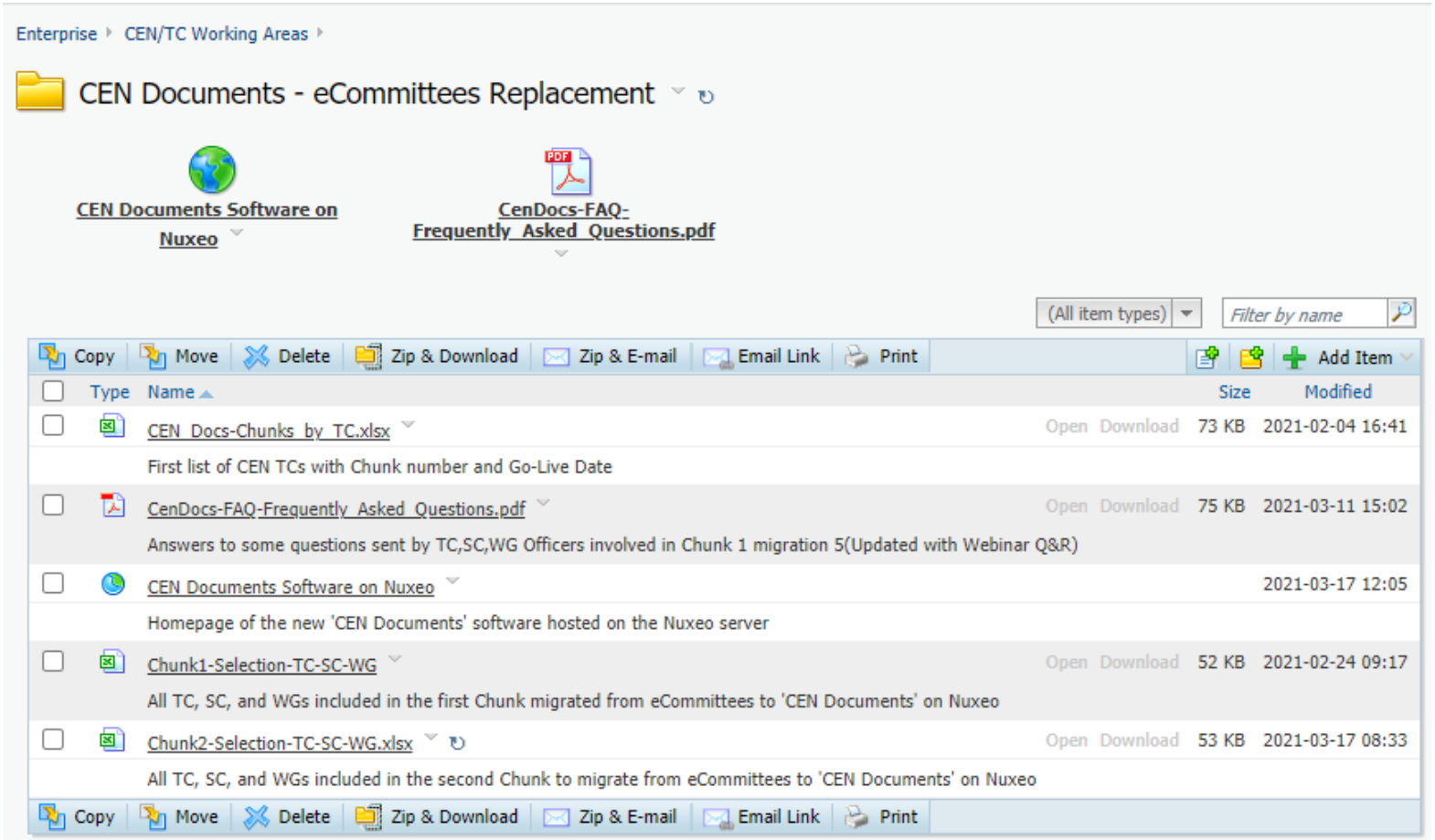
(“*CEN Documents*” in subject)

Additional Resources

- The recording of this session and the slides will be made available for you in the CEN Training space : https://www.cencenelec.eu/aboutus/ourservices/Training/ITtools/Pages/default.aspx

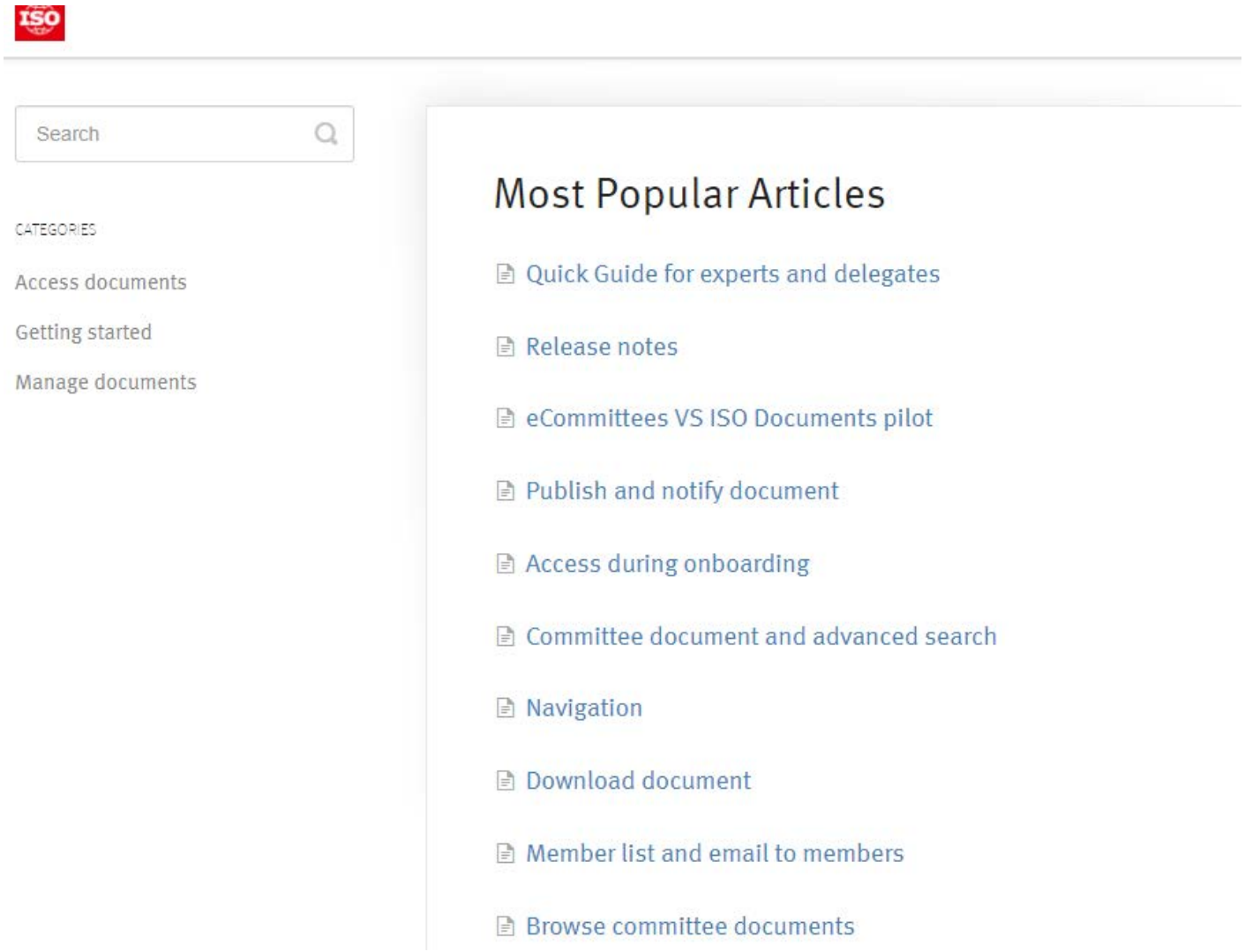
Additional Resources

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



Additional Resources

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



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

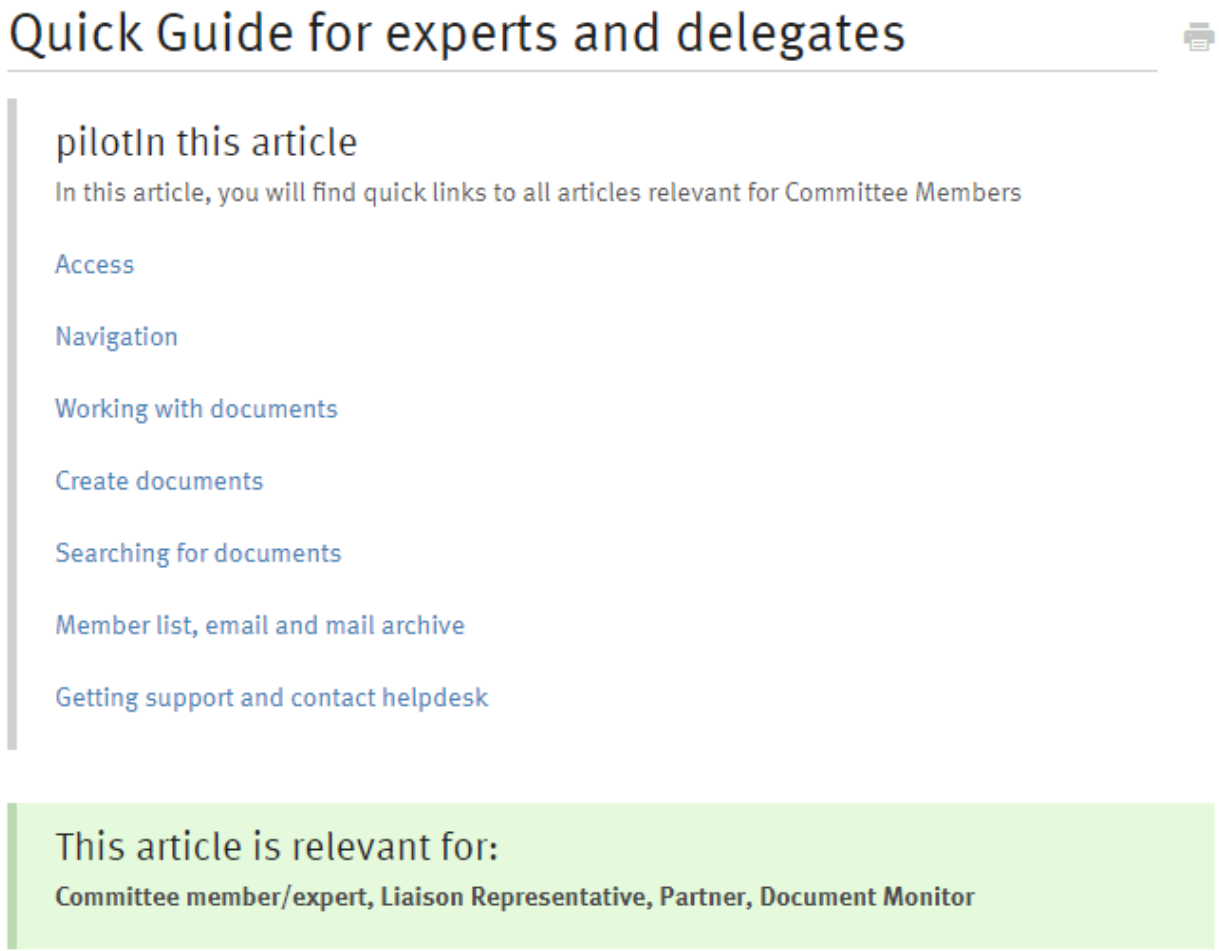
VIDEO

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 draft communication messages to send to your experts / delegates
- A Quick guide for experts and delegates is available in the KnowledgeBase



11. What’s next?

Next steps :

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

- Before 30 march - Advice for DIN Secretaries : Notify as much documents as possible

- ISO has started Pre-Migration of Chunk 2 Documents

- On **Tue 2021-03-30** : Chunk 2 Go-Live :
  - Content freeze : Starting **06:00 AM** → No more Uploads
  - Downloads from eCommittees still possible
  - CEN Documents should be available for Chunk 2 Committees on next day

Questions / Answers

Thank you