

Agenda

- 1. General Planning
- 2. Elements to consider during Pilot phase
- 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 Notify a document
- 6.5 Replace/withdraw a document
- 6.6 Clipboard
- 6.7 Notify Documents
- 7. Member upload area & administration folder
- 8. eCommittees vs CEN Documents
- 9. Summary CEN vs ISO Documents
- 10. Provide feedback
- 11. Support & help
- 12. What's Next?



Project goal

Replace CEN eCommittees ensuring integrity and traceability of documents

Streamline User Experience by

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





Project update (ISO)

Design phase at ISO:

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)

CEN Committees on-boarding (Mar-Apr. 2021)

All CEN committees migrated in 3 chunks



Provisional Planning (CEN)

Pilot:

2021-01-14: This Kick-off meeting

2021-01-19 : Pilot launch

2021-02-09 : Pilot Feedback

2021-02-09 → 26 : Feedback analysis + Bug corrections if needed ...

CEN Committee On-Boarding (~ 2050 Groups in Three Chunks)

2021-01-29: ISO, DIN and AFNOR to confirm migration feasibility in accordance with timing

CEN Committees on-boarding (mar-apr 2021):

2021-03-09: Provisional date for Chunk 1 launch

2021-03-30: Provisional date for Chunk 2 launch

2021-04-27: Provisional date for Chunk 3 launch







Document migration

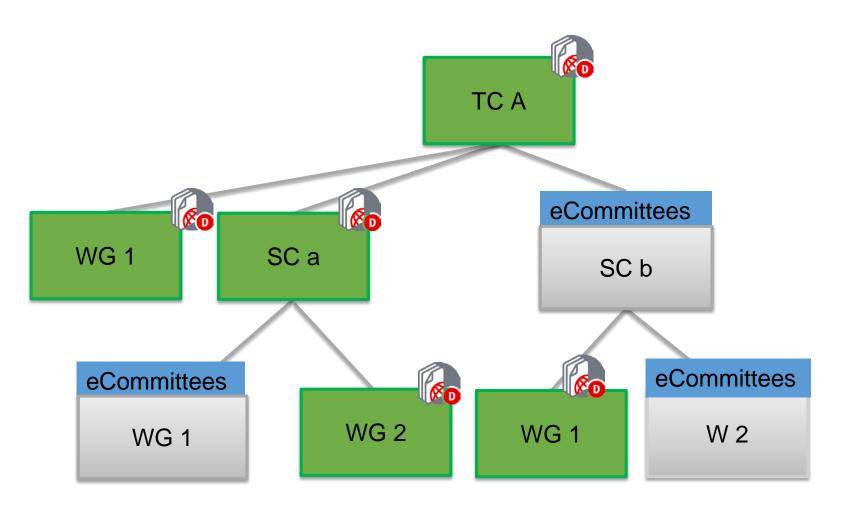
All <u>pilot</u> committee/working group documents will be found in CEN Documents

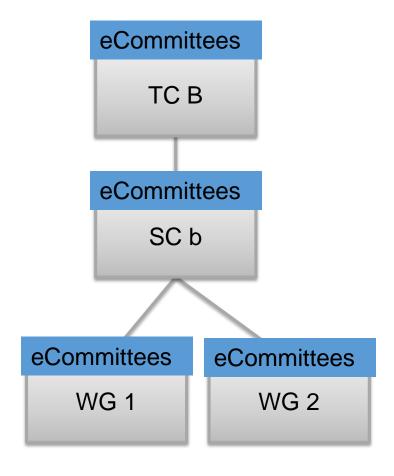
Non-pilot group documents will have to be accessed via eCommittees



Pilot Structures (Jan 2021)

Other Committees







CEN Pilot Committees:

2 Committee structures, excluding Disbanded groups and groups hosted at AFNOR or DIN

COMMITTEE	TYPE	STATUS	SECR
CEN/TC 247	TC	Active	SNV (Switzerland)
CEN/TC 247/WG 4	WG	Active	DIN (Germany)
CEN/TC 247/WG 6	WG	Active	AFNOR (France)
CEN/TC 254	TC	Active	NEN (Netherlands)
CEN/TC 254/SC 1	SC	Active	DIN (Germany)
CEN/TC 254/SC 2	SC	Active	SNV (Switzerland)
CEN/TC 254/WG 1	WG	Active	NEN (Netherlands)
CEN/TC 254/WG 3	WG	Active	NEN (Netherlands)
CEN/TC 254/WG 6	WG	Active	UNI (Italy)
CEN/TC 254/WG 9	WG	Active	DIN (Germany)
CEN/TC 254/WG 15	WG	Active	_



Library folders

		CEN Documents	eCommittees		
Title 1	Modified 1	Administration	00. Secretariat workspace		
Administration (restricted)	2019-12-05	(restricted)			
General	2019-12-05	General	02. General committee documents		
Meetings	2019-12-05	Meetings	03. Meetings		
		Decisions	NEW (not in WGs)		
Resolutions	2019-12-05	Projects	04. Projects		
Projects	2019-12-05	Member upload area	05. Drop-in box for		
Member upload area	2019-12-05		members		
		Mail archive	NEW		
Mail archive	2019-12-05				



What content to expect?

- All documents and N-documents and all folders
- ✓ 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 document types (shortcuts, URLs, forum threads and messages etc...)



Other considerations



Internet Explorer NOT supported

→ Use Chrome, Firefox, Edge, ...

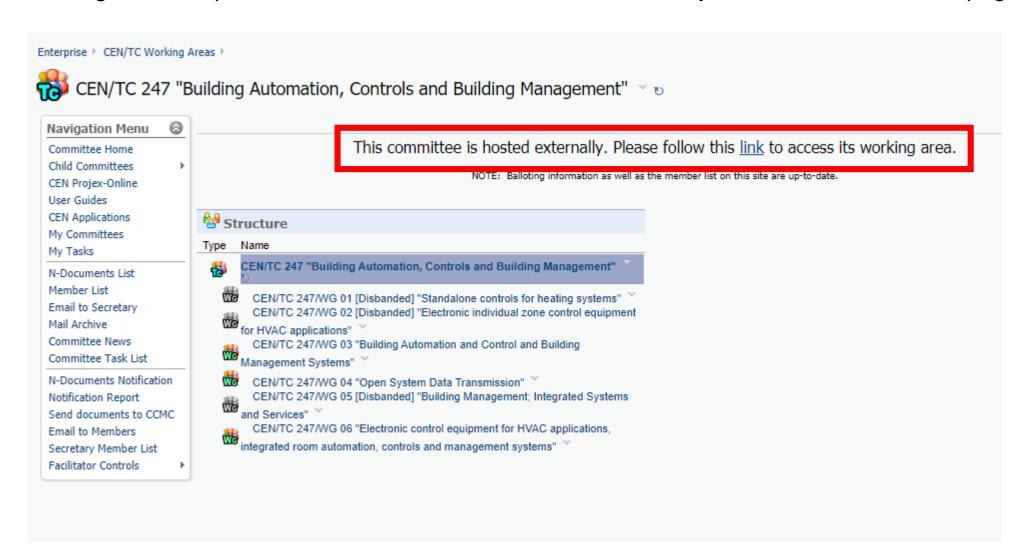
Committees hosted at AFNOR & DIN will now be managed from CEN Documents





Access from eCommittees

During the Pilot phase, CEN documents can be accessed via your eCommittees home page





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



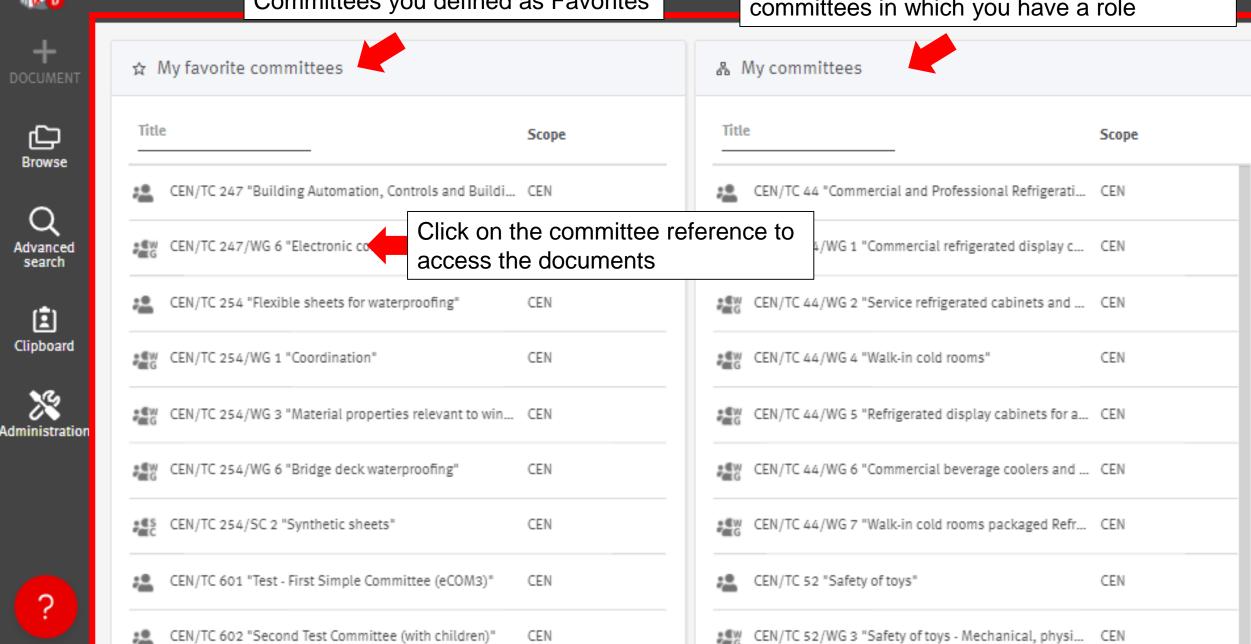


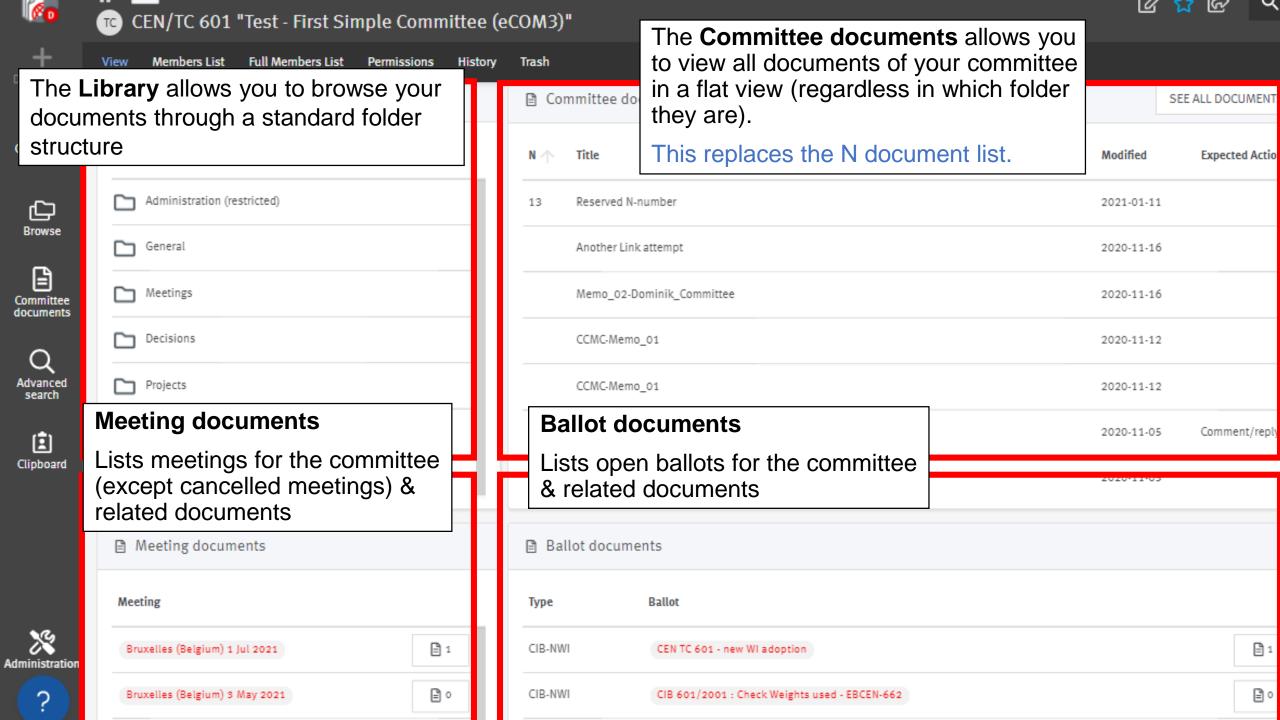


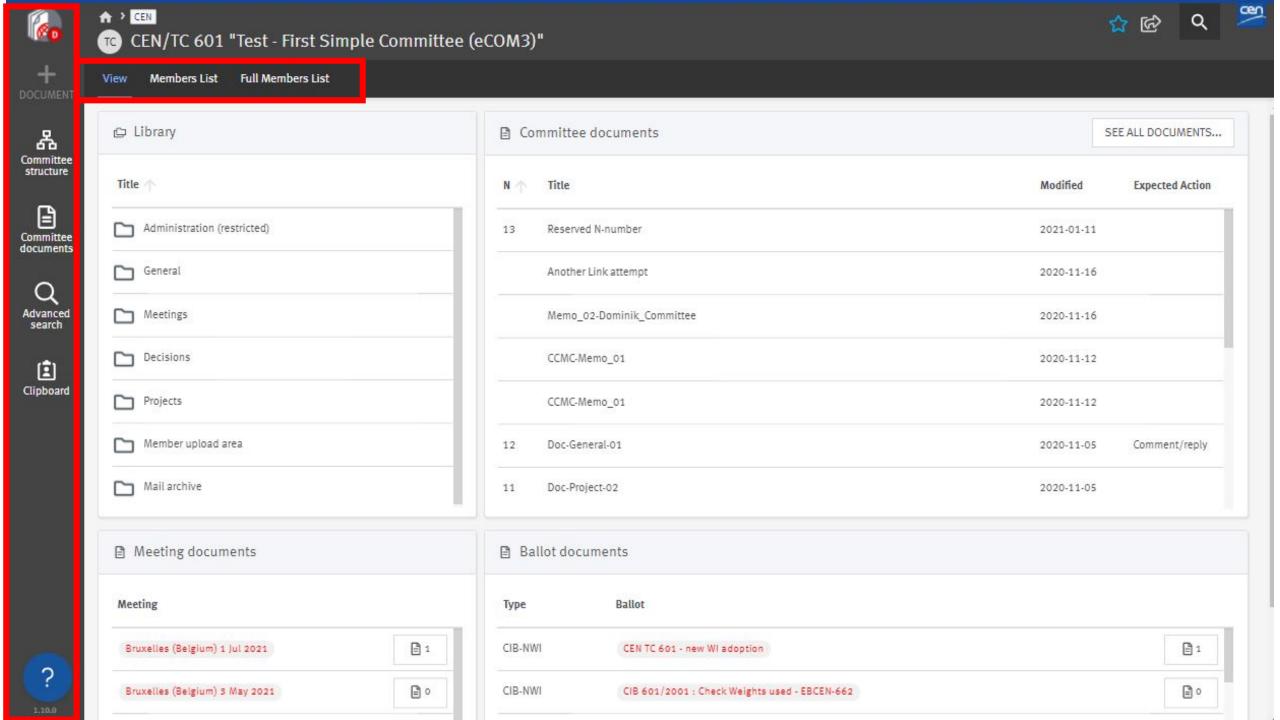
Dashboard

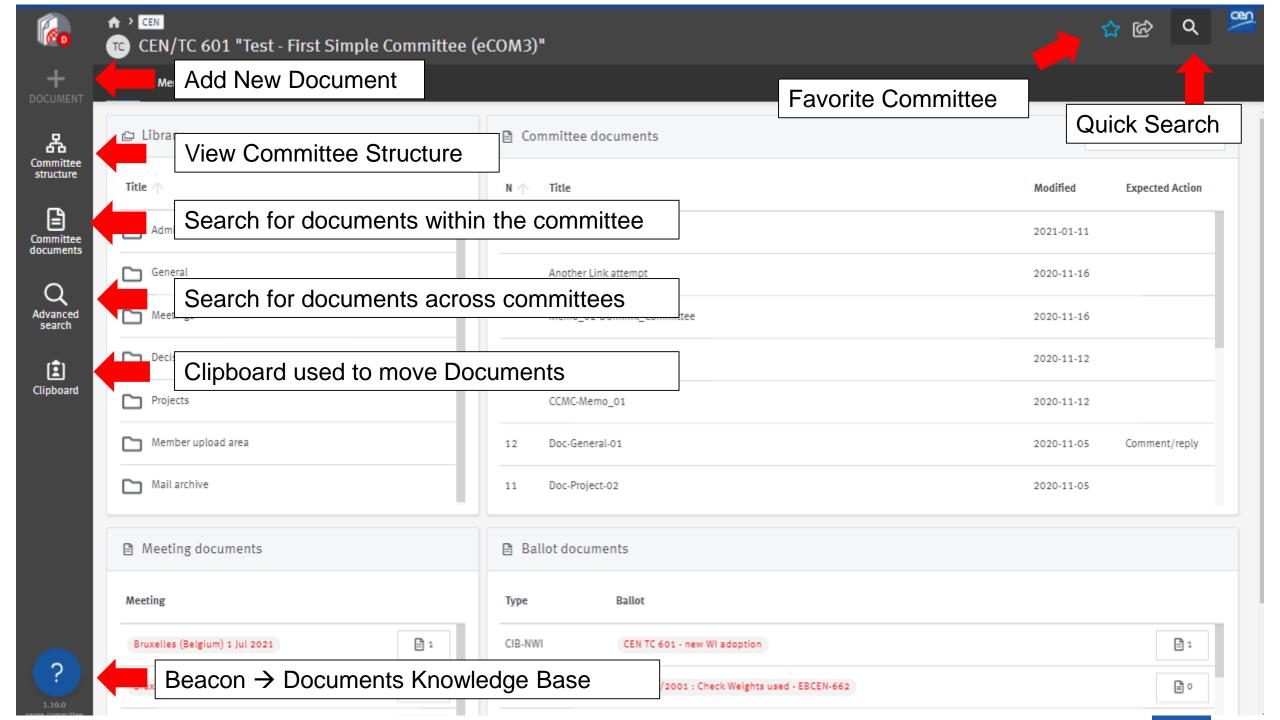
Committees you defined as Favorites

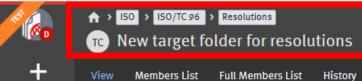
The **Dashboard** includes the list of all the committees in which you have a role















Available

Available

2020-05-26

2020-05-26









格 Committee structure



Advanced search



3

_____2

Demo resolution (15-24)

Demo resolution (4-14)

9 r	esult(s	s)							=
ı	N	1	Title	Meeting	Resolution number start - end	Resolution year 🔨	Status	Modified 1	*
) 1	10	ISO Documents training.pptx		-	2020	To be notified	2020-07-21	~
	9	,	ISO Ballots training.pptx		-	2020	To be notified	2020-07-21	~
	7	7	Demo resolution (4-14) - Copy (10).docx	Geneva (Switze	1-14	2020	To be notified	2020-07-21	~
	8	3	Demo resolution (4-14) - Copy (9).docx	Geneva (Switze	1-14	2020	To be notified	2020-07-21	~
) 6	5	Demo resolution (4-14) - Copy (8).docx	Geneva (Switze	1-14	2020	To be notified	2020-07-21	~
	5	5	Demo resolution (4-14) - Copy (7).docx	Geneva (Switze	1-14	2020	To be notified	2020-07-21	~
	4	1	Demo resolution (4-14) - Copy (6).docx	Geneva (Switze	1-14	2020	To be notified	2020-07-21	~

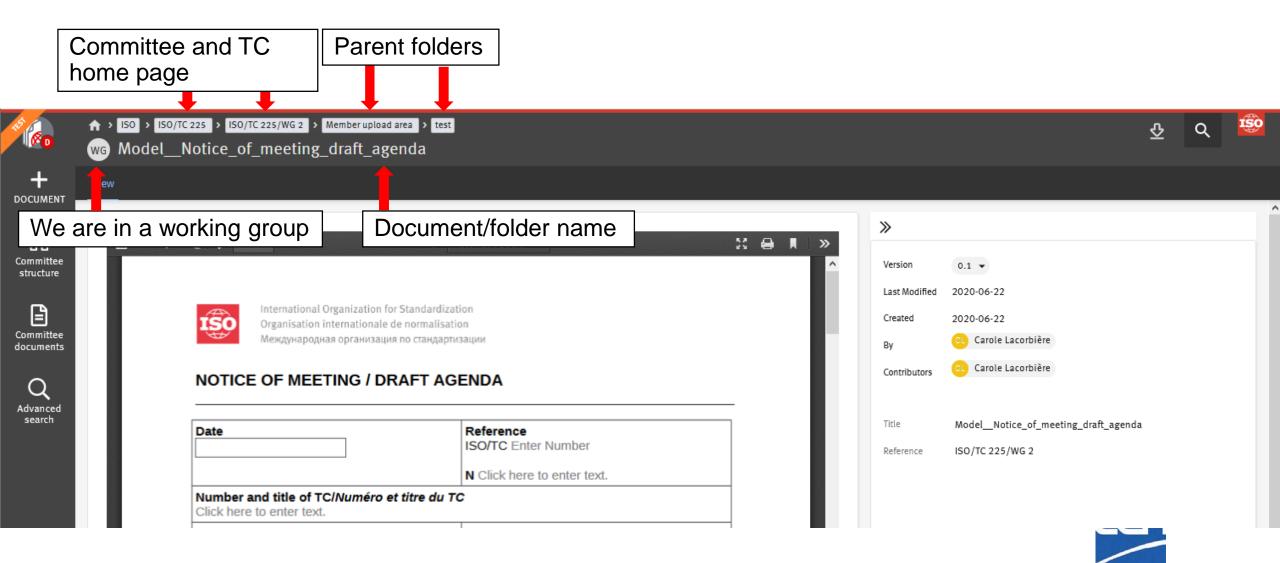
VIRTUAL 26 May 15-24

VIRTUAL 26 May 4-14

2020

2020

Breadcrumb: Navigation in your Committee



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)



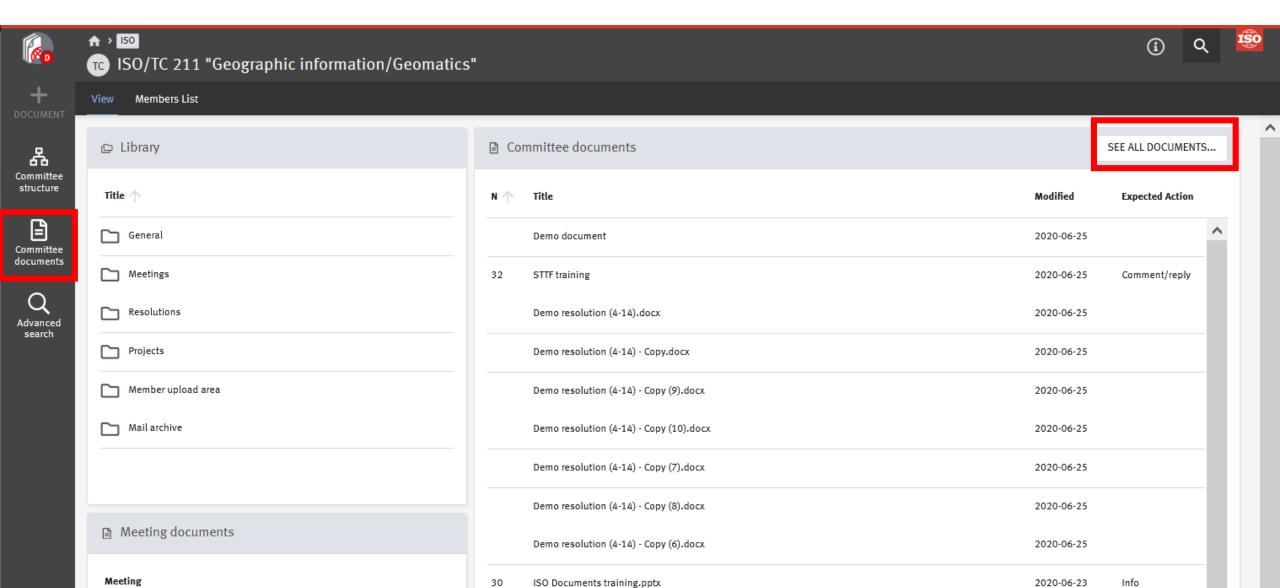
Document types : eCommittees vs CEN Documents

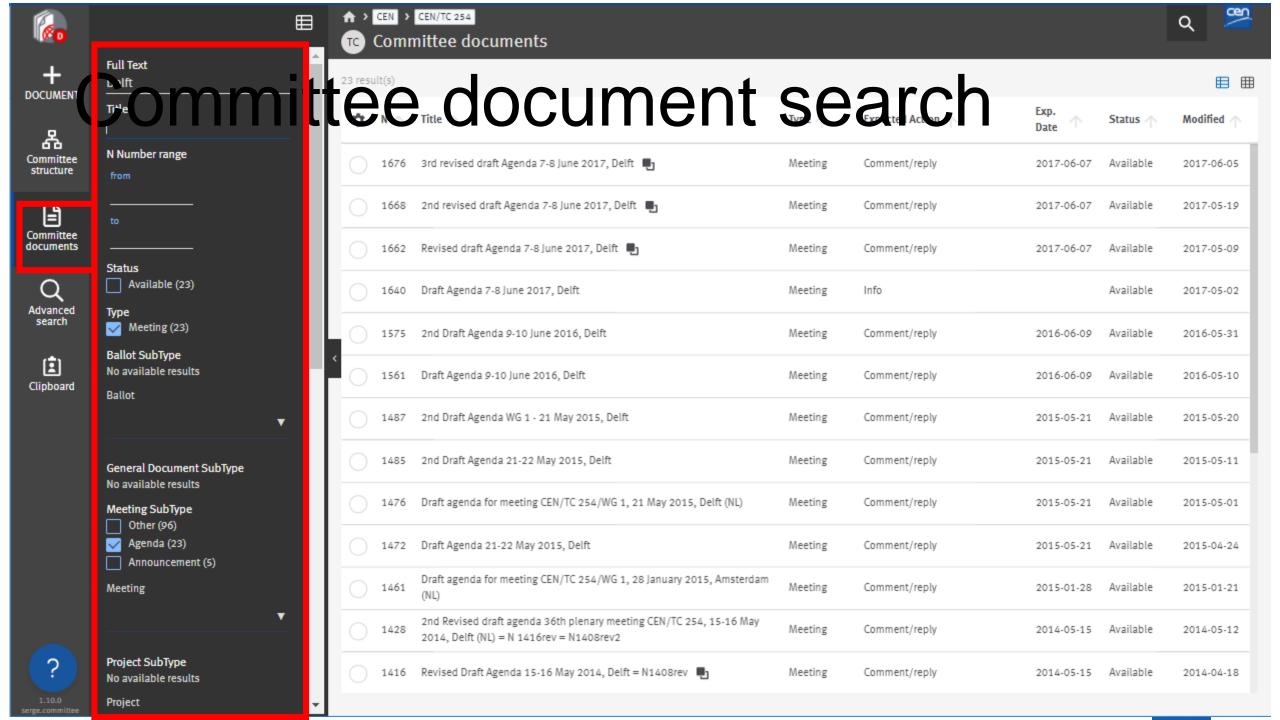
eCommittees types	CEN Documents types
Public document	General
Other Committee Document	General
Draft	Project
Meeting	Meeting
Resolution	Decision
Ballot	Ballot



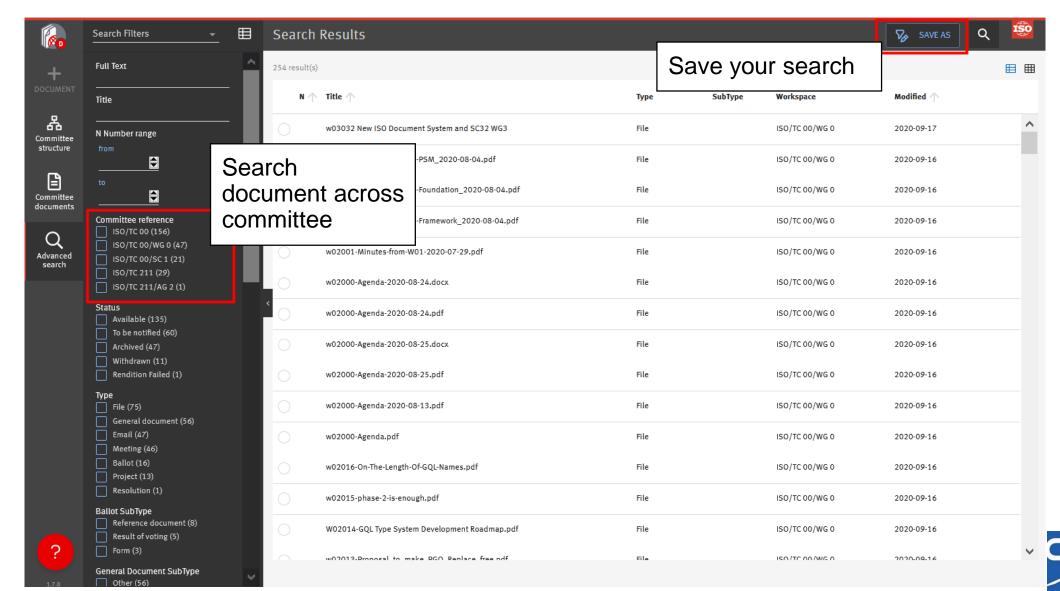


Committee document search



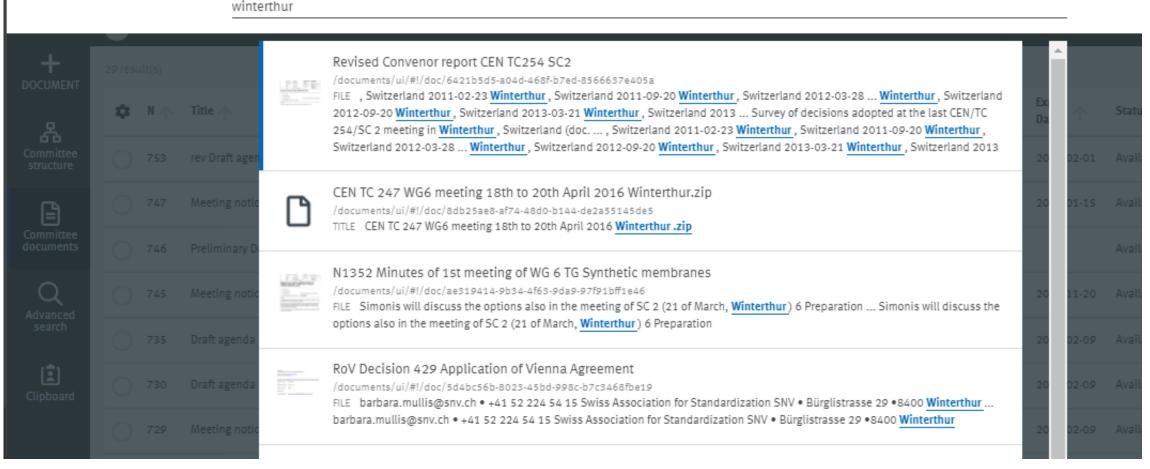


Advanced search & save search



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 Ů × 4 item(s) selected Display selection Clear 29 result(s) DOCUMENT Expected Action 🔨 Title 🛧 Modified / Type 🔨 Status & Committee rev Draft agenda SC2 plenary meeting 2018-02-01 Comment/reply Available Meeting 2017-02-01 2017-12-19 structure Meeting notice 2018-02-01 Winterthur Switzerland Meeting Comment/reply Available 2017-11-21 2017-01-15 Committee documents Preliminary Draft agenda plenary meeting 2018-jan-feb Available Meeting Info 2017-10-03 Meeting notice 2018-Jan-Feb Winterthur Switzerland Meeting Comment/reply 2017-11-20 Available 2017-10-03 Advanced search Draft agenda plenary meeting 2017-02-09 Meeting Available Comment/reply 2017-02-09 2017-01-31 Draft agenda plenary meeting 2017-02-09 Comment/reply Available Meeting 2017-02-09 2016-12-01



QR code: from print to digital

Scan it and you are taken to the online digital version Dynamically generated in your cover pages

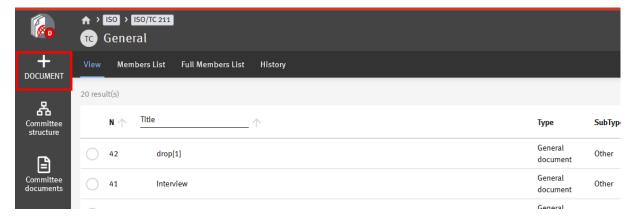




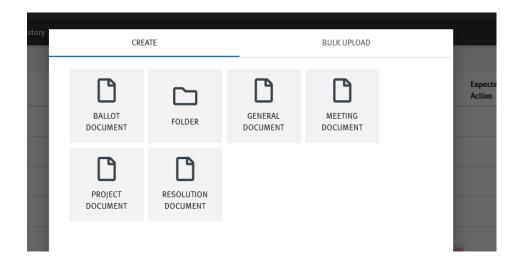


Create a document

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





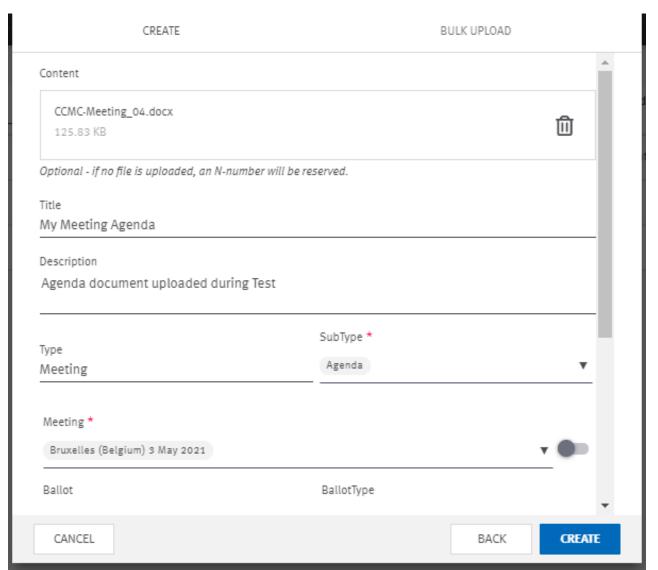
The type of document you select is important as it will drive the metadata displayed



Create a document

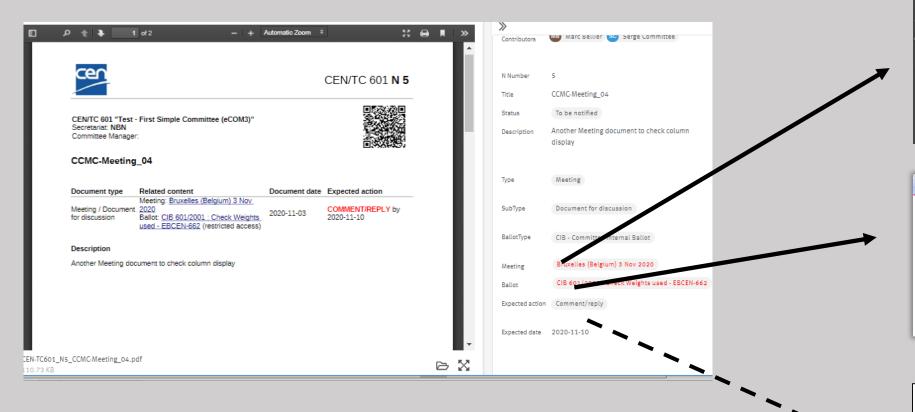
3. Fill in the metadata

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





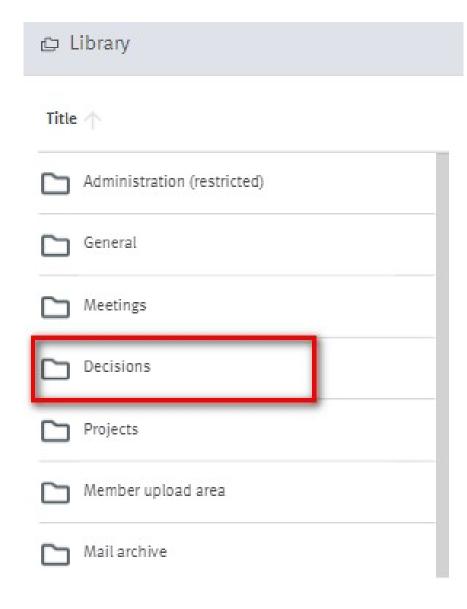
Navigate to related content







CEN Projects



Decisions

Replaces Resolution document type from eCommittees

Can be linked to:

- > Ballot
- Meeting
- ➤ Project (→ later)

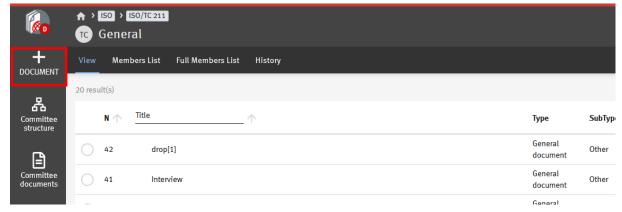
Searchable by decision number and year

- 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



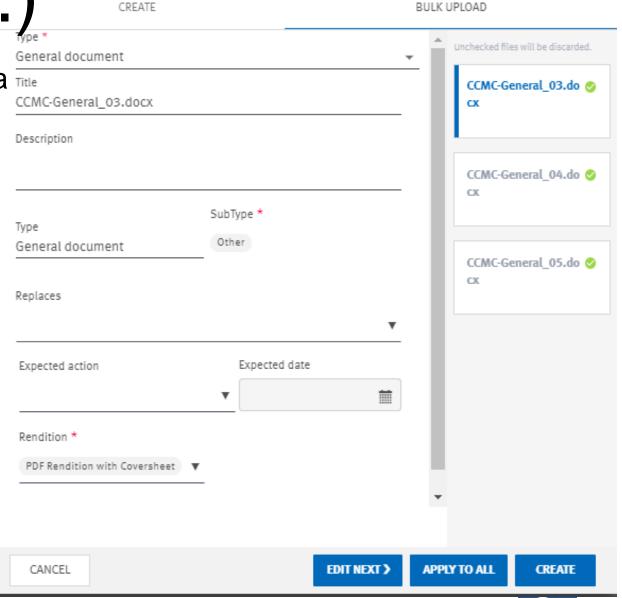
3. Drag & drop your documents, or just click on the text to select your files



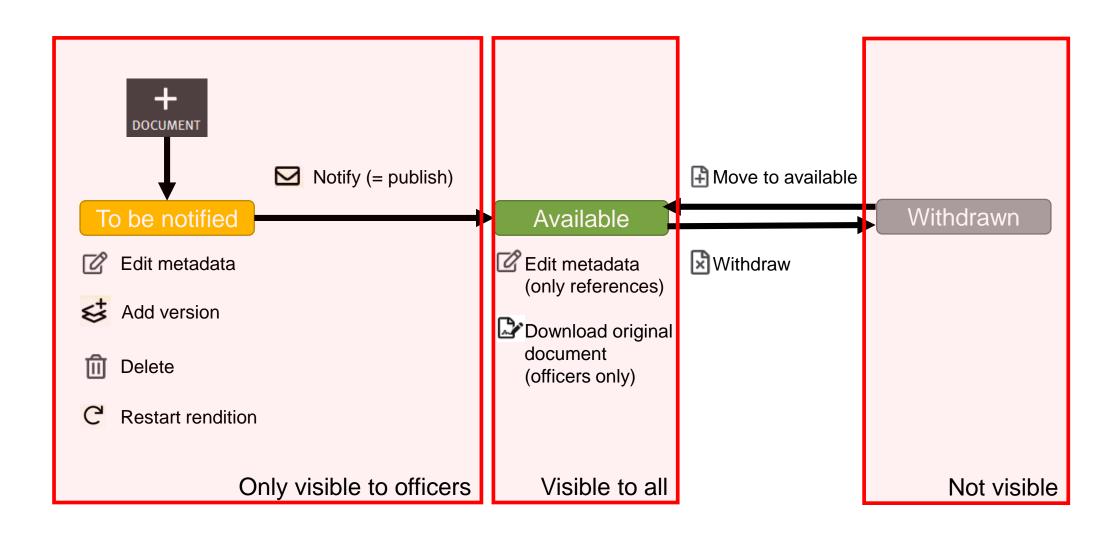
Bulk upload (cont.)

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 a N-number

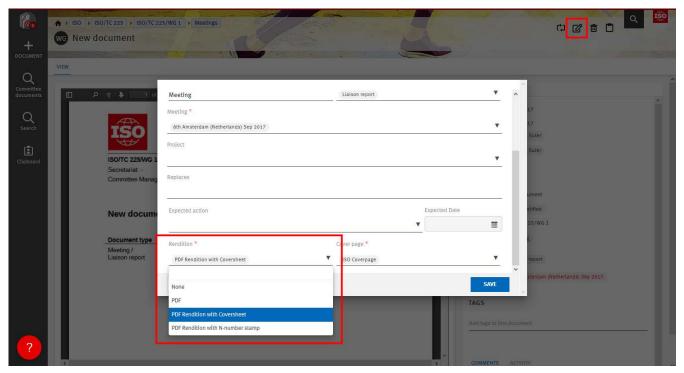
When a document is deleted, its number is automatically reassigned to the next document uploaded

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





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

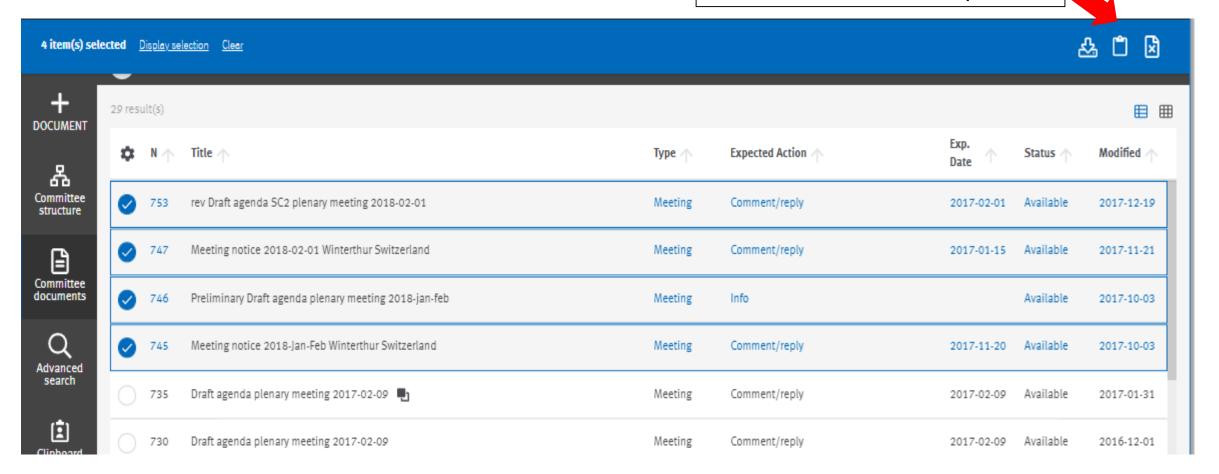


Committee root folders are restricted to certain document types. You cannot move a meeting document within the Projects folder and vice versa.



Move to Clipboard

move selected files to clipboard





Move from Clipboard

selected destination folder ↑ CEN > CEN/TC 247 > Gener CLIPBOARD 10 04 Other information Minutes Plenary Antwerp 20170301 02 (x) Full Members List History Members List DOCUMENT Report Liaison CLC TC205 Antwerp 2017... (x) 3 result(s) & Notice Meeting Oslo 20180425 26 Committee Type SubType Meeting structure Draft Agenda Plenary Oslo 20180425 26 (x) Template National and Regional data General sheet for CEN or EN ISO EPB 1349 Other document standards - 2017-09-06 Committee documents General IEC TC 34 CD on IEC TS 63105 Other 1336 document Call for convenor new WG Control General 1266 Other applications document Advanced search Ė Clipboard Click on Move ♠ 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.

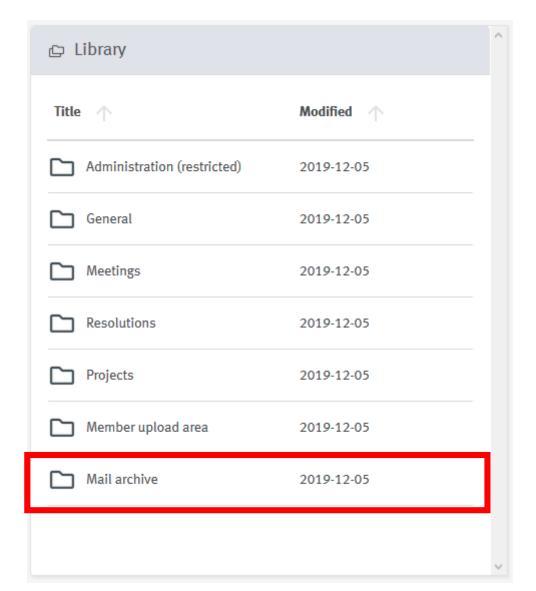
The message is sent to <u>all</u> the direct audience of the committee by default.



Pending notification reminder (one email for all your committees)



Mail archive



All emails* sent from ISO Documents are archived in **Mail archive**

Searchable via the Advanced search



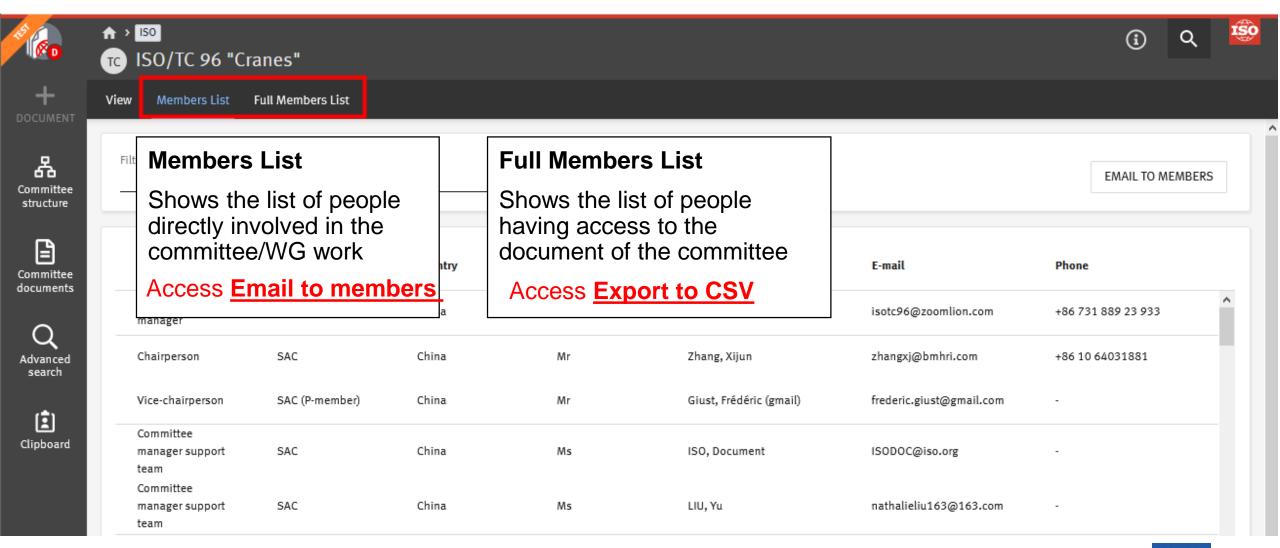
All the audience of the committee can browse the mail archive

READ ONLY!!

*document notifications and email to members

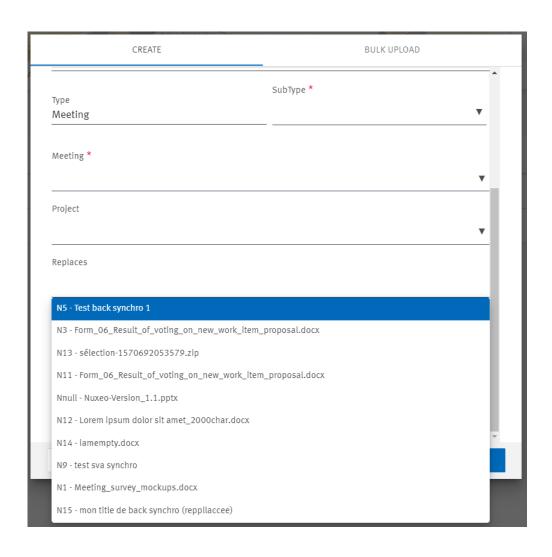


Members list and full members list





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

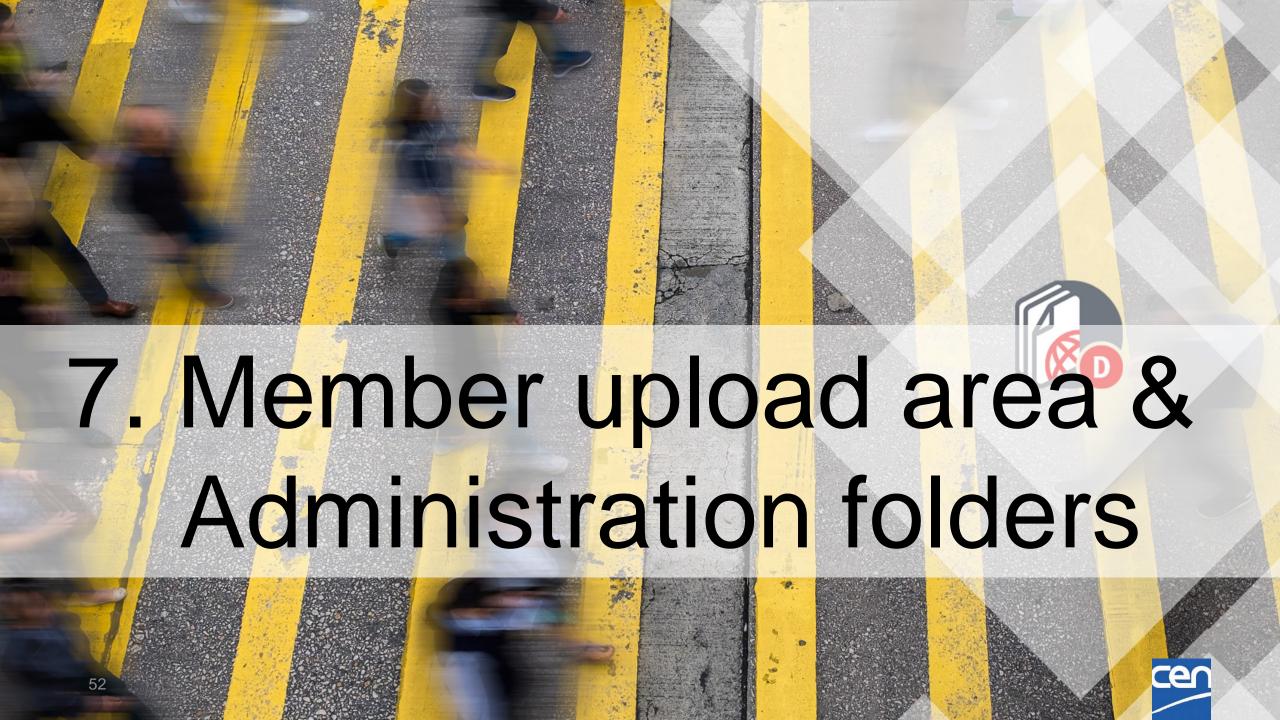
Open the document details page and click on Cross icon



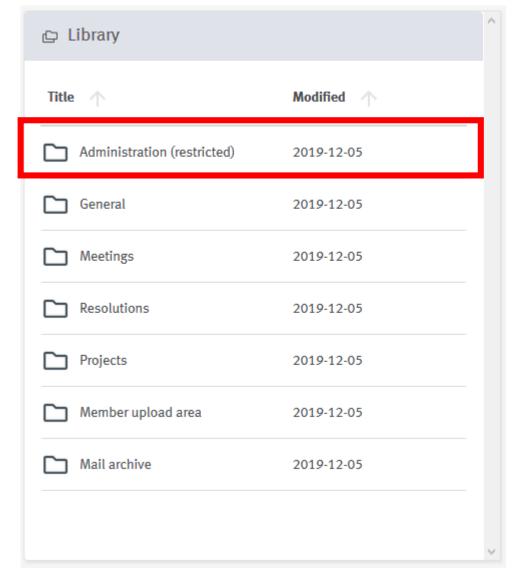


Withdrawn documents can no longer be downloaded nor previewed by anyone, including Secretaries and Convenors





Administration (restricted)



Working area for Managers

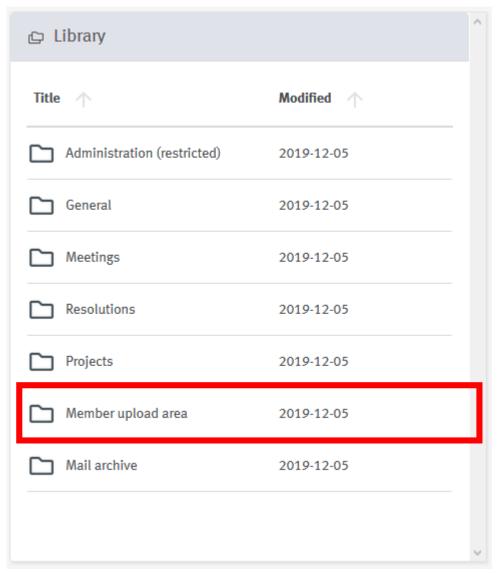
= Secretariat workspace

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





eCommittees vs CEN Documents

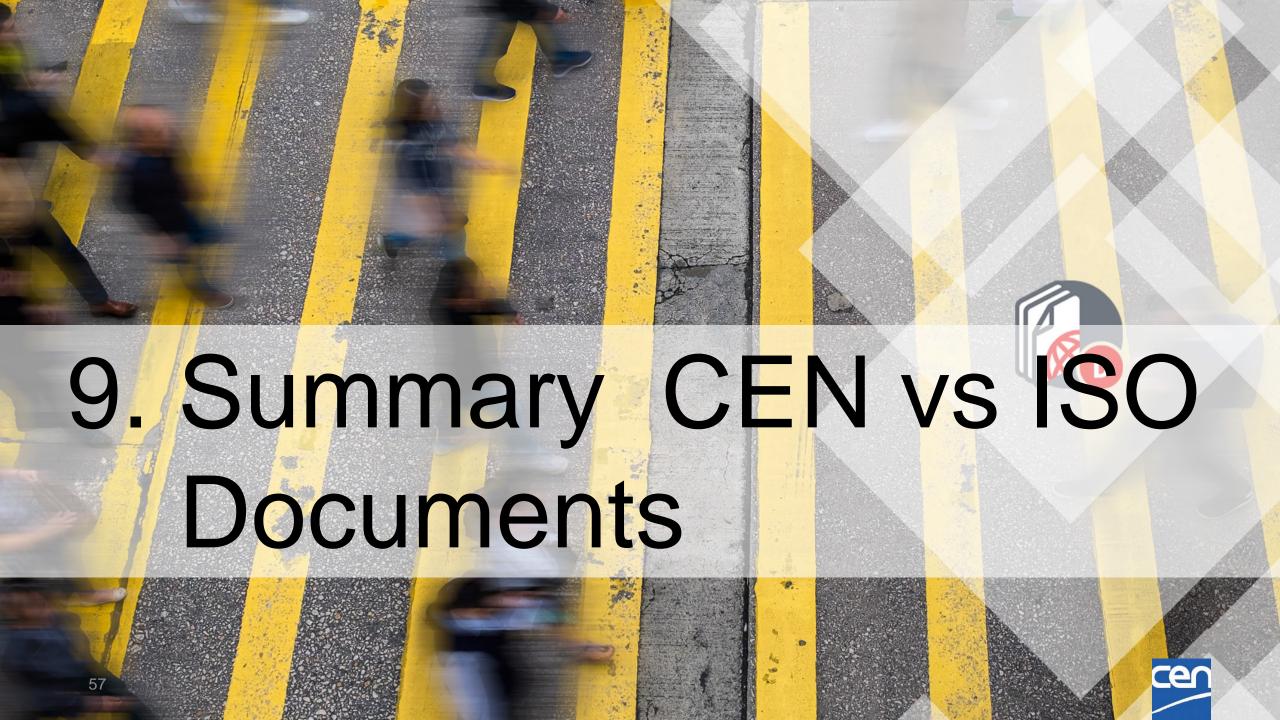
Document management

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

Page in ISO Documents Knowledge base

+ 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	X 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)	X No anonymous access
Reserve N number	✓	×
Create cover page only	✓	Planned for a later stage





Main Differences – CEN % ISO

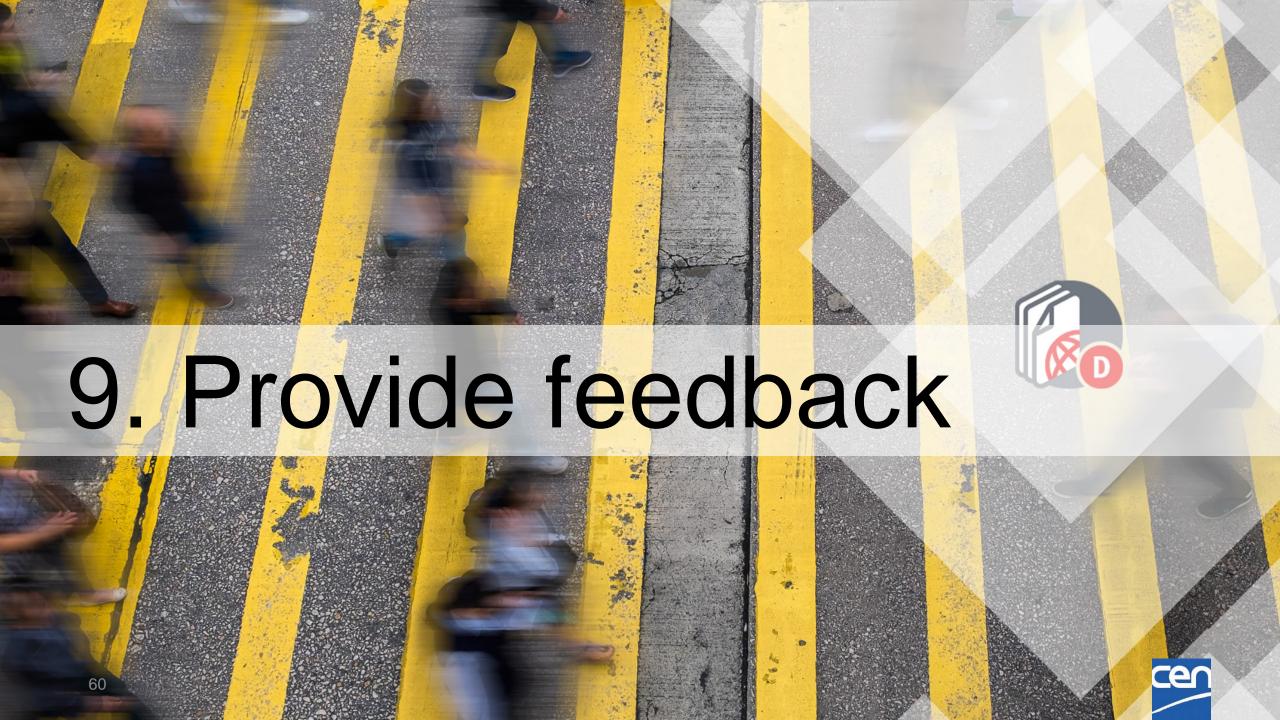
Folder Structure Mapping:

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) (name different from ISO) Absent from WG	
04. Projects (N)	Projects (N) No Ballot Documents for WGs	
05. Drop-in box for members	Member upload area	
08. Balloting and commenting	Not migrated to Nuxeo; (Kept on CENTC for Dissemination to NMC)	
(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)
- Document types :
 - Ballot Types
- CEN Project link : Later







Surveys will be sent to you



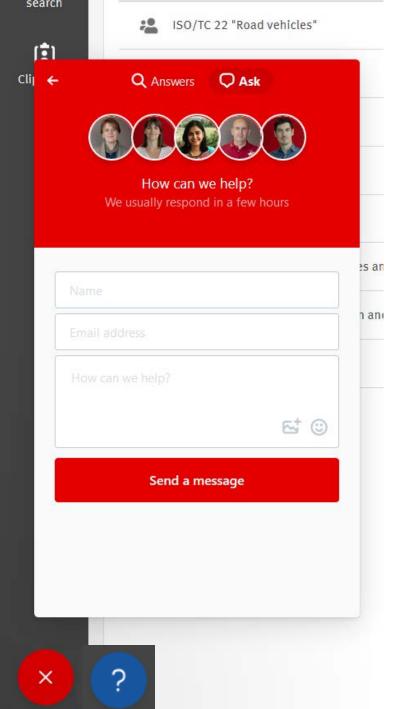
Ask helpdesk at ISO helpdesk@iso.org





Integrated Knowledge Base





version 0.8.9

Help: just one click away!

Integrated Knowledgebase

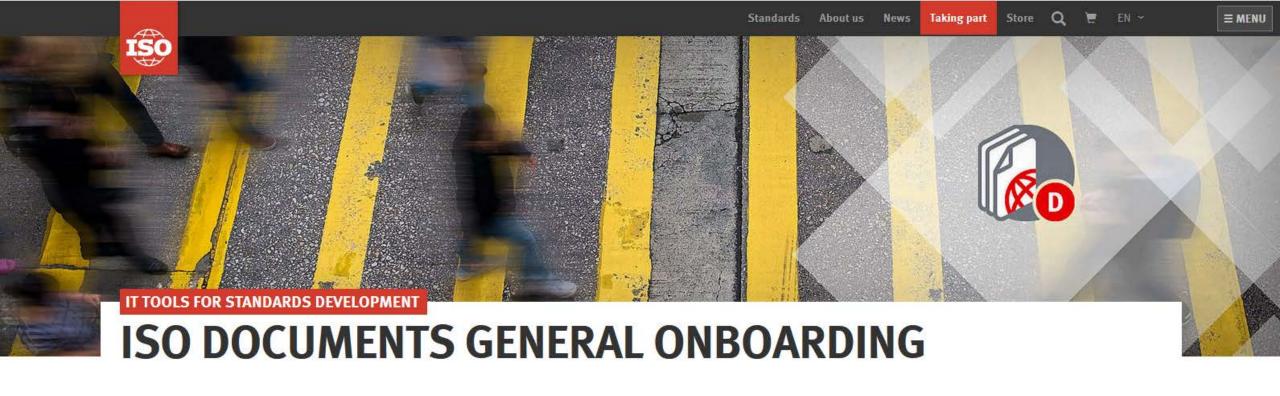
+ Support at the CEN Helpdesk at ISO: helpdeskcentc@iso.org



Resources for you

- The recording of this session and the slides will be available for you in the CEN Training space.
- The SD-Documents knowledge base is available here: https://iso-sandbox-knowledge-base.helpscoutdocs.com/collection/301-iso-documents
- Keep an eye on the ISO Project webpage for more info (https://www.iso.org/iso-documents-GG-0A1B2C-2)





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





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



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Next steps

Ongoing migration of your documents

Content freeze on **Tue 19 January 6AM to 1PM** – no creation of content

CEN Documents Pilot live: 19 January PM (we will contact all officers once platform is accessible)



Support for experts and committee members

- We will provide drafted communication message to send to your experts / delegates once on CEN Documents
- A Quick guide for experts and delegates is available on the KnowledgeBase





