Global Directory

User guide for User Administrators v2.0

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1 Introduction

The **Global Directory** (GD) is the central repository for managing committees, users and their roles on committees for international (ISO, ISO/IEC), regional (CEN[1]), and national work (for ISOlutions[2] and the dissemination of documents via National eCommittees Lite (NTClite)[3]).

The main purpose of the GD is to provide ISO and CEN member bodies with a tool to register and maintain the individuals who act as their representatives in ISO and CEN Technical Committees, Subcommittees and Working Groups as well as Voters on documents. Additionally it allows ISO and CEN member bodies that use the NTClite service or any of the ISOlutions applications to manage their National Committees and experts.

Depending on the role assigned to a person in the Global Directory, the correct permissions are automatically assigned to access documents, ballots and other relevant information in the other ISO and CEN electronic applications. Details on roles and associated permissions can be found in the Annex 1 of this user guide.

In **summary**, the Global Directory manages:

- Member bodies and organizations involved in standards development
- ISO, CEN and National committees
- National representatives and technical experts taking part in ISO, CEN or national committees
- Experts roles in ISO, CEN and National committees

⚠️ *Only CEN Members can view the CEN data and its related menus*

cen *A **CEN supplement** to this user guide is provided for CEN Members to guide you through any CEN specific procedures. You can download it at this URL: http://isotc.iso.org/livelink/livelink?func=ll&objId=15512230&objAction=Open&nexturl=%2Flivelink %2Flivelink%3Ffunc%3Dll%26objid%3D5157776%26objAction%3Dbrowse*

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[1] CEN corresponds to the European Committee for Standardization (www.cen.eu).

[2] ISOlutions offers services to support members performing National, Regional and International standardization work

[3] National eCommittees Lite (NTCLite) is a service provided by ISO to allow automatic dissemination of International and/or Regional standardization work documents at the National level.

1.1 What are the main changes in the new version of the GD?

1.1.1 Merge of ISO and CEN Global Directories

In its previous version, the ISO and CEN Global Directories were two separate applications. The new version of the Global Directory (also called Global Directory 3) merges the ISO and CEN Global Directories into a single application and database. This simplifies the User Administrator's work by avoiding duplication of entries.

> ⚠️ *Only CEN Members can view the CEN data and its related menus*

1.1.2 Updated terminology

The following terms have been changed for more clarity and harmonization with CEN:

- **Member Body User administrators** was changed to **User Administrators**.
- **Balloter** was changed to **Voter**.

1.1.3 Improved user interface and search

A brand new user interface has been designed for easier navigation and access to the information you are looking for. New search features have been introduced and now better integrate special characters in searches and wildcard searches.

A **Jump-to** menu has been added allowing you to easily identify the different roles a person has, and to quickly navigate to each role.

1.1.4 Access to the GD restricted to User Administrators

Access to GD is now limited to User administrators only. From now on Secretaries should rely on their eCommittee's workspace to consult their committee's member list, as they will no longer be able to access the GD. Users can change their password from the login page by clicking on *My settings* from the Actions menu.

Secretaries that try to access the Global Directory will get the following message:

Figure 1- Access to the Global Directory by Secretaries

> *Refer to the **CEN supplement** section 1.1 to see what CEN secretaries will get as message when trying to access the Global Directory.*

Additionally, the GD will now allow designating a **central point of contact** for User Administrators of a National Standardization body (NSB).

1.1.5 Increased visibility on data for User Administrators

Some visibility constraints have been removed. User administrators will now be able to do the following:

- Search and view the public profile [4] of all the person registered in GD (only the User administrator administering the person can view his full profile),
- View all the roles a person has in International, Regional committees (if member) and his own National committees,
- Search and view all International committees, Regional committees (if member) and his own National Committees,
- Search and view all International Organizations, European Organizations and his own National Organizations

Therefore the sole limitation is that a User administrator cannot see:

- National committees and organizations that are administrated by other NSBs,
- the roles a person has in other National committees than the ones he administers,
- the personal details of a person which profile is administrated by another NSB.

These new visibility rules allow User administrators to see more information and therefore a new declaration related to the use of information, including participants' personal information has been issued. Please take particular note of the declaration you accepted on your first use of GD3.

Note that the notion of delegated MBUA has disappeared as visibility constraints have been removed.

1.1.6 Persons are no longer linked to a country

One of the big revolutions in the GD is that a person is no longer linked to a country at registration. This allows a person to represent different organizations in different roles/ committees.

In the new GD, the field **Administered by** will allow members to keep track of the experts they have registered.

1.1.7 Differentiating between administering a user and appointing a user

Like in the previous version of the GD, only one organization can register a person and consequently maintain their personal details like their first and last names, personal email, telephone, postal address, status, etc. The organization entitled to administer the person's details is indicated by the **Administered by** field on the person's profile. It corresponds by default to the organization that has initially registered the person in the GD.

The new feature introduced by this version of the GD is that the assignment of roles to a person can be performed by different organizations. This allows a person to represent different organizations in different roles/ committees. The appointing organization is indicated by the **Appointed by** field on each of the roles assigned to a person.

Note the field Appointed by can be an organization or a committee. For instance:

- a secretary is appointed by the NSB holding the secretariat.
- a committee member is appointed by a NSB
- a convenor is appointed by the parent committee

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[4] A public profile hides personal information such as phone numbers, postal address, person's preferences. The public profile is displayed to User administrators not administrating the person's profile.

1.1.8 New roles superseding "Member of Organization" and "Centralized committee member"

To accommodate the need for a person to represent more than one organization in committees, the role **Member of Organization has been removed.** The **Appointed by** field will allow indicating which organization a person represents in a committee.

The new role **Employee of Organization** enables to identify people that are directly working in an organization (Staff) and assigning key functions within the organization (e.g. CEO, CEO Assistant, Training coordinator, etc.) which can be useful point of contacts.

A new role of **Document monitor** has been created that allows read-access on eCommittees. This role should only be assigned to NSB staff members, either in a centralized or decentralized way, to allow them to monitor the work of committees without being confused with a committee member participating in the work. This role **replaces the ISO Centralized committee member role** (available on ISO/TC, SC only) **and the ISO Observer role** (available on ISO working group only) that have been removed.

> *Note that the CEN Observer role available on CEN TC and TC/SC is still available in the GD (it has a different meaning than the ISO Observer role on working groups).*
>
> *However CEN centralized committee member role has also been replaced by the Centralized document monitor role (similarly to ISO).*

1.1.9 Metadata for roles

Metadata can be associated with every role managed in the GD. Metadata are information that characterizes a role. It can be a comment, a reference to a resolution, or any additional information on the role.

Note that some metadata are mandatory at role assignment (e.g. stakeholders category [5] when assigning a committee member in a WG; ballot type when assigning a Voter), and some are optional (e.g. comment).

> *The handling of Stakeholder categories is currently not implemented for CEN roles, because of pending business decisions.*

1.2 My role as User administrator in the GD

In the Global Directory some roles are centrally administrated by ISO/CS or CCMC and some are managed by designated User administrators of ISO and CEN members.

> *The GD allows you to define a main point of contact for the User administrators of a NSB (see section 4.5.2)*

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[5] Following TMB Resolution 75/2012 (recalling Resolution 89/2011), each expert (from either an ISO member body or a liaison organization) on an ISO working group or similar body should indicate the stakeholder category that most closely reflects his or her background. More information on stakeholder categories is provided in Annex 2 at the end of the user guide.

As a User Administrator, you are entitled to:

- Register and manage experts and their roles in committees
- Register and manage organizations (except International Organizations).
- Create and manage National Committees

All International Organizations and ISO member bodies are created and maintained centrally by ISO/CS.

ISO roles maintained by User Administrators	ISO roles maintained by ISO/CS
• Committee Member • Secretary Support Team (if your NSB holds the secretariat of the TC or SC) • Balloting roles: Voter and Monitor • Document Monitor • Translator • Employee of organization • Roles in National committees	• Committee Secretariat, Liaisons, Convenorship • Committee officers (e.g. Secretary, Convenor, Chairs) • Convenor/Secretary Support team (at WG level) • Chairperson Support Team • NSB Participation to committees (P and O-members) • Project roles (e.g. Project Leader, or Submitter) • Liaison Representatives

*Refer to the **CEN supplement** section 1.2 for the roles' management at CEN.*

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

PREFERENCES

☑ Closed group

☐ Mirrorable

☑ Twinnable

☑ Participation

For more information on roles and who can update them, please refer to the Annex 1 at the end of the user guide.

*Refer to the **CEN supplement** Annex 1 for the CEN roles definitions.*

Only CEN Members can view the CEN data and its related menus

2 Logging in and logging out

Access the GD through ISO Electronic Applications homepage at https://login.iso.org and click on **Global Directory.**
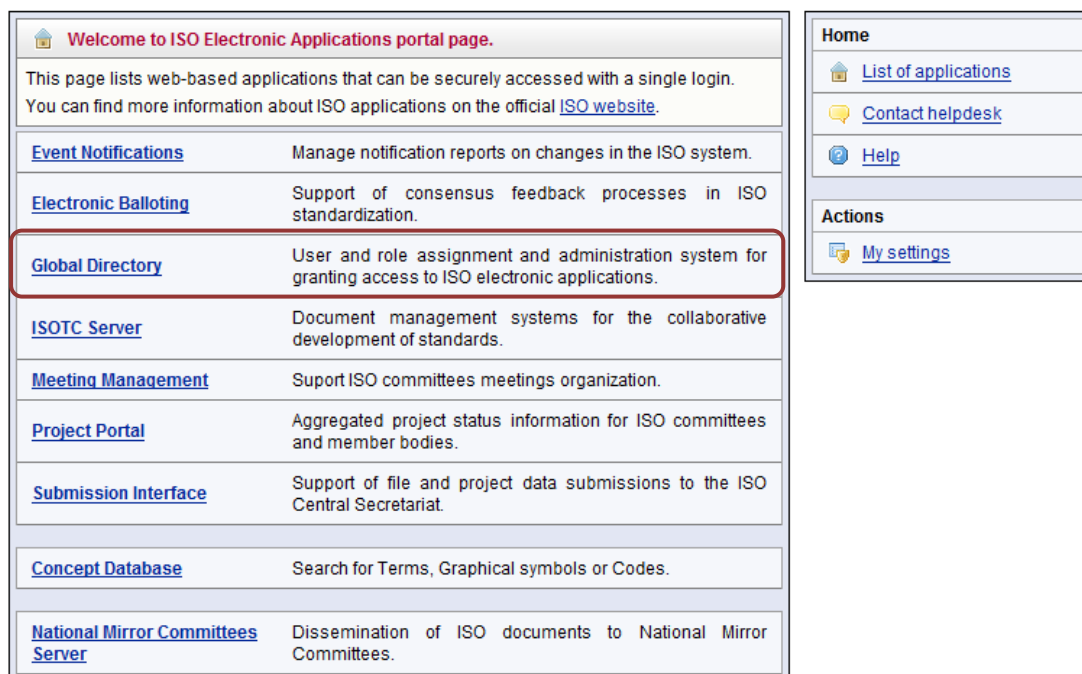

Figure 2 – ISO Electronic Applications homepage

> cen   *Refer to the **CEN supplement** section 2 for an alternative login procedure through the CEN application portal*

2.1 Logging in

The process to login from ISO or CEN Electronic applications homepages is the same.

a)   Start your Internet browser and open the corresponding URL. Click on **Sign into applications**
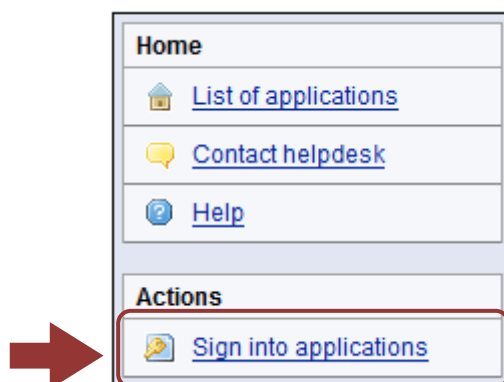
Figure 3 -Sign into applications

b) Enter your username and password

c) Read the declaration and tick the box to accept the conditions

Figure 4 – ISO/CEN Electronic Applications Log-in screen

d) Click on **Sign in** and select **Global Directory**

> *Your username is sent to you by e-mail at your registration in the Global Directory by your User Administrator. This email contains a link allowing you to choose your password. Please follow the steps as described in the email.*

> *Note that both username and password are case-sensitive, i.e. they have to be entered exactly as provided.*

2.2 Logging out

a) In Global Directory, click **Sign out** in the **Personal** menu.

Figure 5 – Global Directory Log out

b) Confirm you wish to be logged out of your session by clicking **Log-out** on the confirmation screen.

c) You will be forwarded to the list of Electronic applications.

2.3 Password/username forgotten

If you have forgotten your password or your username, you can request to reset your password or a reminder of your username on the log-in page.

a) If you forgot your username, click on the link **I don't know my username** next to the log-in fields. This will automatically send an email to the Helpdesk team with a request to verify your identity and provide you with your username.

b) If you forgot your password, click on the link **I have lost my password** next to the log-in fields and follow the instructions on the screen. Within the next few minutes you will receive an e-mail with a link to reset your password.

Figure 6 - Password/ username forgotten

3 User interface and navigation

3.1 Home page

After login, you will be directed to the Global Directory **Home** page, which displays the different categories of items available, and the various actions you can perform, including:

- Use the advanced searches,
- Register new items (persons, national committees, organizations)
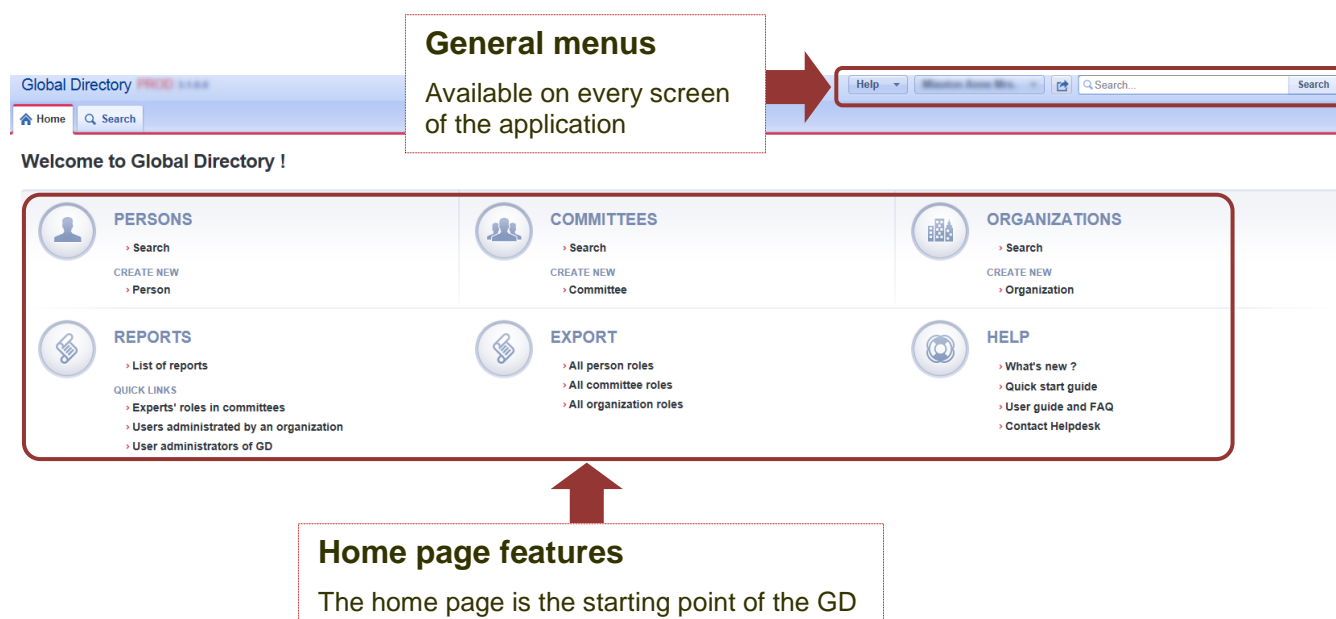- Run reports,
- Access the help items.

General menus

Available on every screen of the application

Welcome to Global Directory !

Home page features

The home page is the starting point of the GD

Figure 7 – Global Directory Home page

Features	Description
Persons section	Access the **Persons Advanced search** or **Create a new Person**
Committees section	Access the **Committees Advanced search** or **Create a new Committee**
Organizations section	Access the **Organizations Advanced search** or **Create a new Organization**
Reports section	**Run the different reports** available for data extract
Help section	Access the different help files and release notes
News & Announcements	This section publishes the latest information on the GD such as new releases and planned maintenance.

Figure 8 – Home page features

3.2 General menus

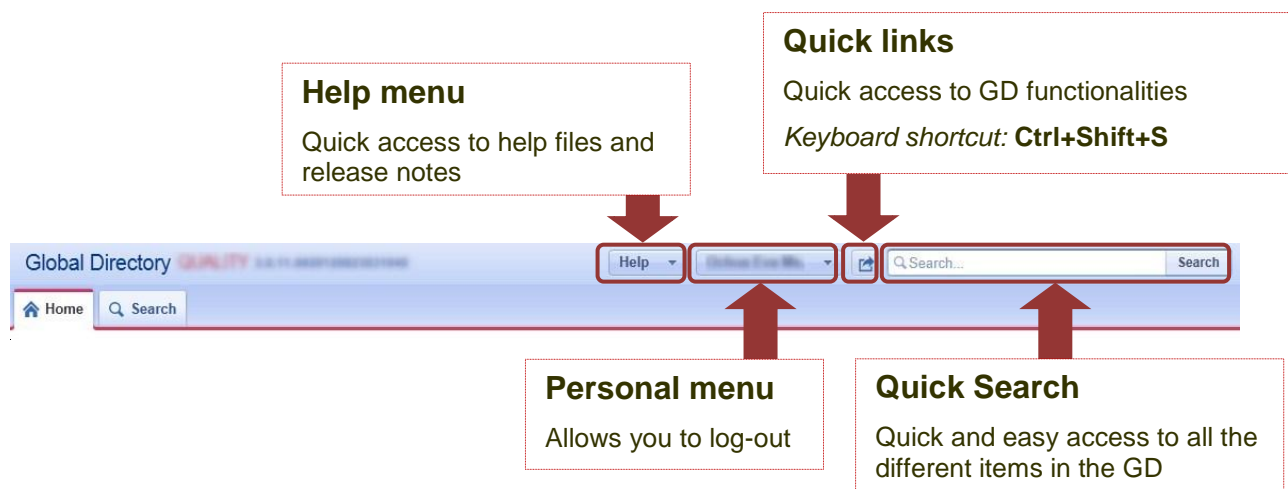The below menus are available on top of every screens of the application:

Figure 9 – General menus

3.3 Searching for Information

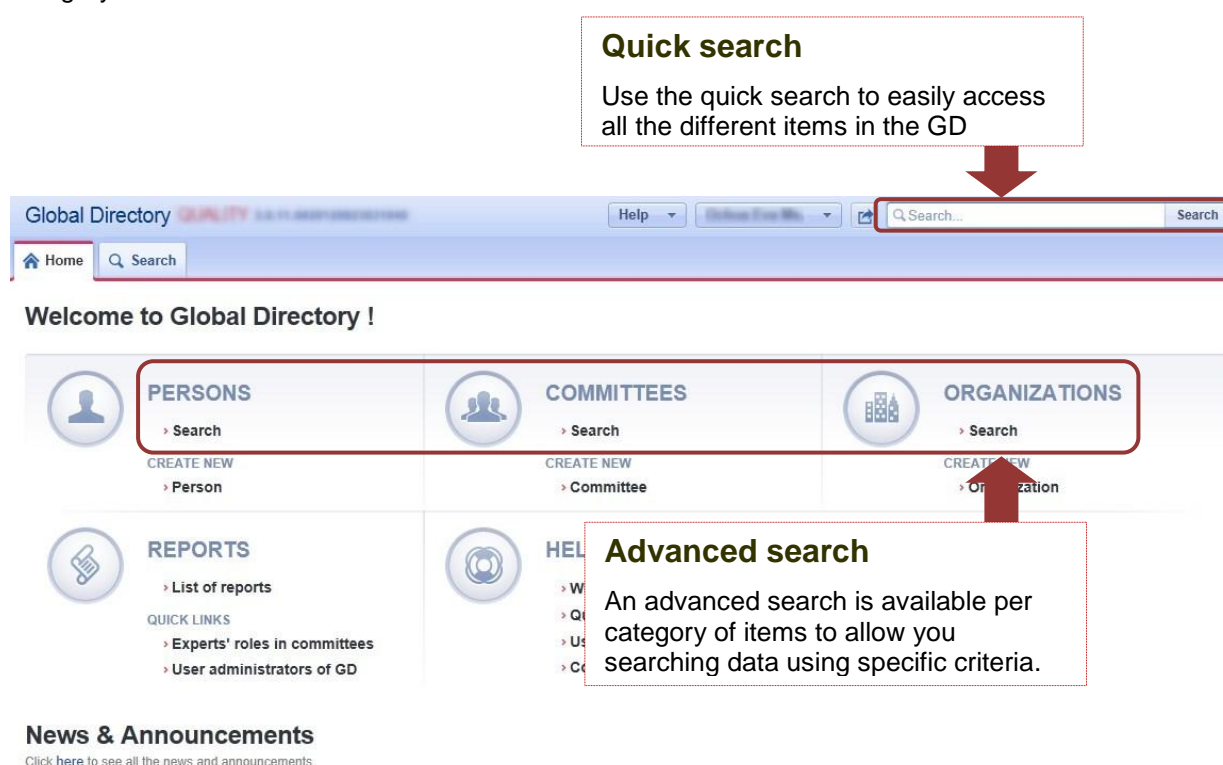The GD allows you to search information using a **Quick search** or **Advanced searches** available per category.

Figure 10 – Global Directory search features

Search results are always displayed in the **Search tab.** In the search tab you can easily switch between Quick Search and the different Advanced Searches.

Figure 11 – The Search tab

3.3.1 Quick search

This feature allows users to perform a broad search across all items in the GD. The results from the Quick Search will display a selection of the most relevant hits per category (Persons, Organizations, Committees, and Projects).

Results show the top 10 results per category. If you wish to select the 10 next items, click on **Load more results**.

> *The **Quick search** is very flexible on word spelling, taking into account special characters, possible spaces in the names, etc.*

Figure 12 – Example of Quick Search results

3.3.2 Advanced search

Advanced searches are available for each of the following categories in the GD: Persons, Organizations, Committees, and Projects (ISO projects only).

It allows you to search entries using specific search criteria and more advanced search options like:

- The **'Start with'** search allows you to type the first letters of a word in the Search criteria.
  E.g. Last name: 'dra': this will return all Last names starting with 'dra'.

- The **Wildcard character '%' (percentage sign)** can be used to substitute any other character or string of characters.
  E.g. 'ca%e': this will return all words starting with 'ca' and finishing with 'e'.

Some fields do not allow free input but offer a **drop-down** menu of possible values. In that case, select the value most relevant to your search.

Note that you can filter down the drop-down list's values by entering the first letters of the value. See the below example with Countries:

Figure 13 – Drop-down menu

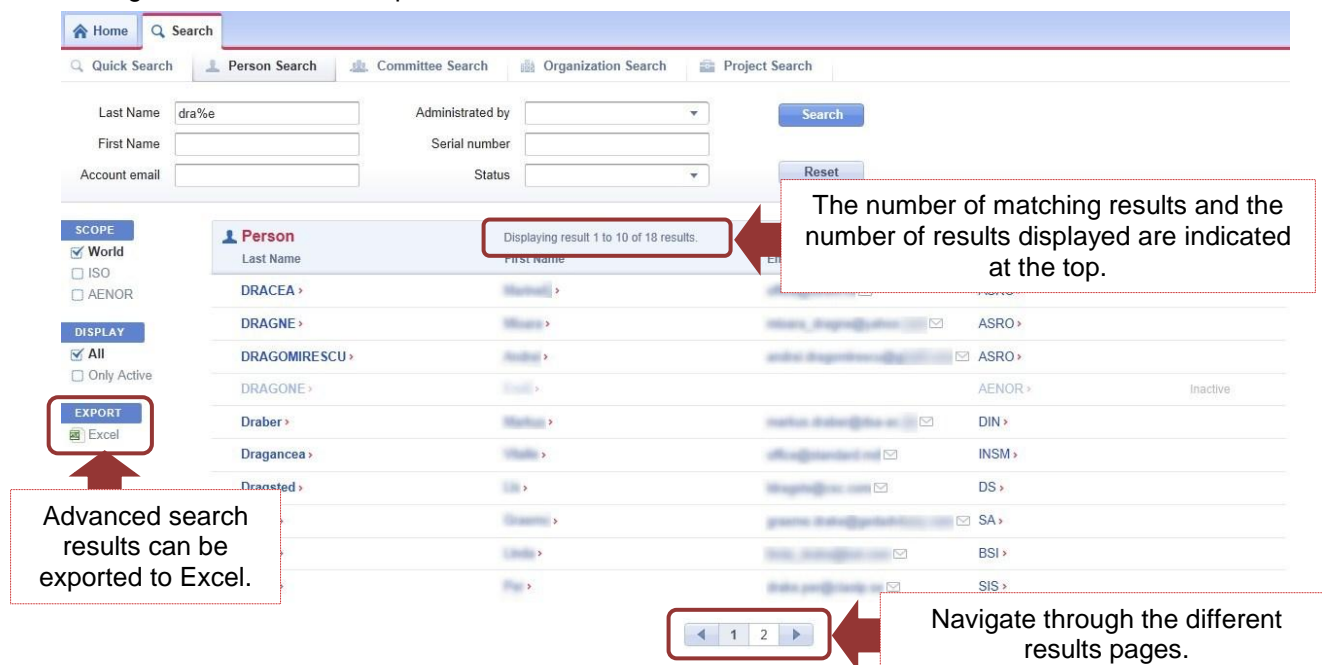The figure below is an example of an Advanced search:

Figure 14 – Example of Advanced Search results

⚠️ *An **ISO (or CEN) Member Body** can easily be identified by this symbol:*

Advanced search results can be **exported to Excel** (this feature is not available for Quick searches).

⚠️ *When search exceeds 100 results, the export will only extract the first 100 results.*

3.3.3 Scope of searches

Since the Global Directory merges data from ISO GD, CEN GD (international and regional level), and National committees. Search results can be narrowed down to a smaller set using **filter** as defined below:

Filter	Description
Scope filters:	
• World	This will display ALL entries
• ISO	This will display entries that are administrated by ISO.
• CEN	This will display entries that are administrated by CEN.
• National	This will display entries that are administrated by your Organization.
Display filters:	
• All	This will display entries without filtering the status.
• Only Active	This will display only entries with an Active status.

⚠️ *The **CEN scope** is only available for CEN members' user administrators.*

Filters are available on the left side of the search results page.

Default values differ depending on the search feature used:

- In Quick searches, the **World scope** will always be selected by default and **Display all**.
- In Advanced searches, your **National scope** will always be selected by default and **Display all**.

Figure 15 – Search results filters

3.4 Viewing the details of an entry

From the Search results tab, click on the entry name to open the detailed view. This will open in a separate tab the profile of the entry with its details and roles:

Figure 16 – View entry details

4 Persons management

As a User administrator you are responsible for managing the roles and details of your national experts and representatives. To manage a Person in the GD, you need to first search for this person and open its profile.

From the person's profile, you have access to all the person's details and roles as well as the menu to allow you to manage them.

4.1 View a person's details and roles

4.1.1 Person menu

On the left side of a person's profile you will find the **Person menu** that allows you to manage their details and roles.

The below figure gives an overview of the different menu items:

Details allow you to view and manage the basic information of the person and transfer roles from the person to another

ISO roles allow you to view and manage the ISO committee and centralized roles of a person

CEN roles allow you to view the CEN committee and centralized roles of a person

⚠ This menu section is only visible to CEN Members' user administrators

National roles allows you to manage the roles of the person in National Committees

Staff roles allows you to manage the roles of the person in an organization

Status allows you to manage the status of the entry (active inactive).

Account allows you to reset or force the password of the person

Figure 17 - Person menu

ⓘ *In the **manage** section of the Person menu you only see the role that you are entitled to manage as User Administrator.*

To view a person's details or role click on **View details** or **View all roles** respectively in the relevant personal menu item. Once all roles are displayed, use the **Jump To** links to jump to the relevant role.

Figure 18 – View all ISO Roles

The **Jump to** section only displays the set of roles a person has. This allows you to identify easily the current roles of the person.

Therefore, if a role is not displayed in the Jump to section, then it means that the person is not assigned the role.

4.1.2 Person Summary banner

On the top of every person's profile a **Summary Banner** gives an overview of the roles of the person, and more specific data such as the organization administering the person's personal details, his status and some system information (e.g. last update date).

Figure 19 - Person Summary banner

4.2 Register a new Person

You can register a new user from the **Home** page by selecting **Person > Create New Person**.

> It is always recommended to first search for the person in GD, to make sure he/she has not already been registered.
>
> If the search returns no results, a direct link **Create new person** is displayed.

Figure 20 – Register a person from the Home page

Figure 21 - Register a person from the Search results page

In the creation screen, enter values for all **mandatory fields** (marked with a red *) and click **Confirm Creation** on the left side of the screen when you are done.

Figure 22 – Update person's details and confirm creation

When a person is created in the GD, an email is automatically sent to him/her with his login information (username and a link to set his/her password).

The below table provides some details on the different fields to edit:

Fields	Description
Last name / First name *(mandatory field)*	This free-text field supports special characters. ⚠️ *Please avoid entering the last/first names in full capital letters.*
Salutation *(mandatory field)*	Select the adequate salutation for the drop-down list. Feel free to select the option **Other**, to enter a different salutation.
Initials	Initials of the person.
Title	Position of the person within his organization.
Email *(mandatory field)*	Email address used as the **username** of the person to access Electronic applications. Confidential information which should only be accessed by the user himself (e.g. changes of passwords) will be sent to this address.
Preferred language	By default set to English. This is for information only and may be used for communication purposes.
Notification email	Email address seen by other users. It is the email used to communicate with the person for regular business matters. If no Notification Email is entered, it will be automatically set to the Personal Email. The notification email can be overridden by another email on specific roles: e.g. when a Secretary wishes to receive all notifications concerning his secretary role to a specific email address.
Telephone	This section allows you to register multiple phones or fax numbers. ⚠️ *Phone/Fax numbers must start with either 00 or +.*
Postal address	This is a free-text field. ⚠️ *This field is optional, but if you start entering an Address, then Town and Country become required (vice versa).*

Figure 23 – Person's details – Field Description

Once the new user is created, your Organization is set as the one administering its personal data. This is shown in the **Summary banner** under the section **Administrated by**.

Organizations administrating
the person's details and status
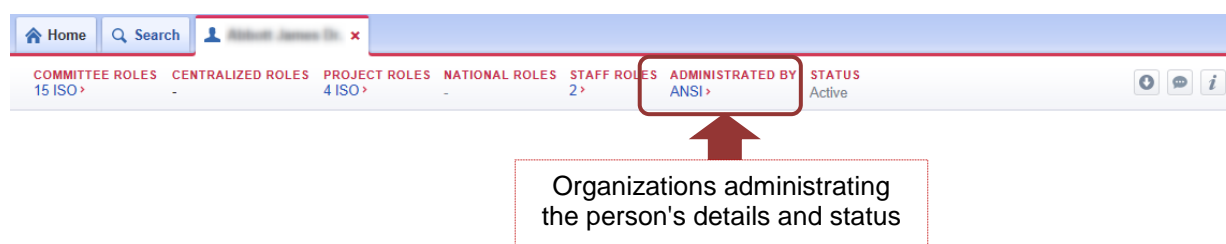
4.3 Modify a person's personal data

As a User Administrator, you are responsible to manage the personal data for the people you are administering in GD.

The personal details of a person (first and last names, personal email, telephone, postal address) are administrated by one organization only (indicated by the **Administrated by** field in the **Summary banner** of the person's profile). By default it corresponds to the organization that has initially registered the person in GD.

⚠️ *If you open the profile of a person not administrated by your organization, you will see his public profile[6] with no rights to edit it.*

To modify a person's details, search for the person, open his profile by clicking on the entry in the search results, and select **Details > Edit details** from the **Person menu**.

All fields that you are allowed to update will then become editable. Once you have performed the required changes, click on **Save changes** on the left side of the screen.

Figure 24 – Edit a Person's details

ℹ️ *In the edit screen, **mandatory fields** are indicated by * and **modified fields** are indicated by*

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[6] A public profile hides personal information such as phone numbers, postal address, person's preferences. The public profile is displayed to User administrators not administrating the person's profile.

4.4 Inactivate a Person (manage a person's lifecycle)

As a User Administrator, you are responsible to manage the lifecycle of the people you are administering in GD.

A person can only have two possible statuses in GD: **active or inactive**.

Deletions are not permitted in the GD in order to keep historical information. Therefore retired users shall be inactivated. This will flag them as inactive in the system, and will remove their access to the different Electronic applications.

> ***There is one exception to deletion.*** *If a person has been created by mistake, you can delete him/her within a period of 2 days. Note that to delete a person, you must inactivate him/her first.*

Only one organization can administer the lifecycle of a person. The organization entitled to administer the person's personal details is indicated by the **Administrated by** field in the **Summary banner** of the person's profile.

To inactivate a user, first open his/her profile then:

1. Remove all his/her roles
2. Select **Status > Manage > Inactivate** from the **Person menu**
3. Enter a comment (this is mandatory for traceability purpose)
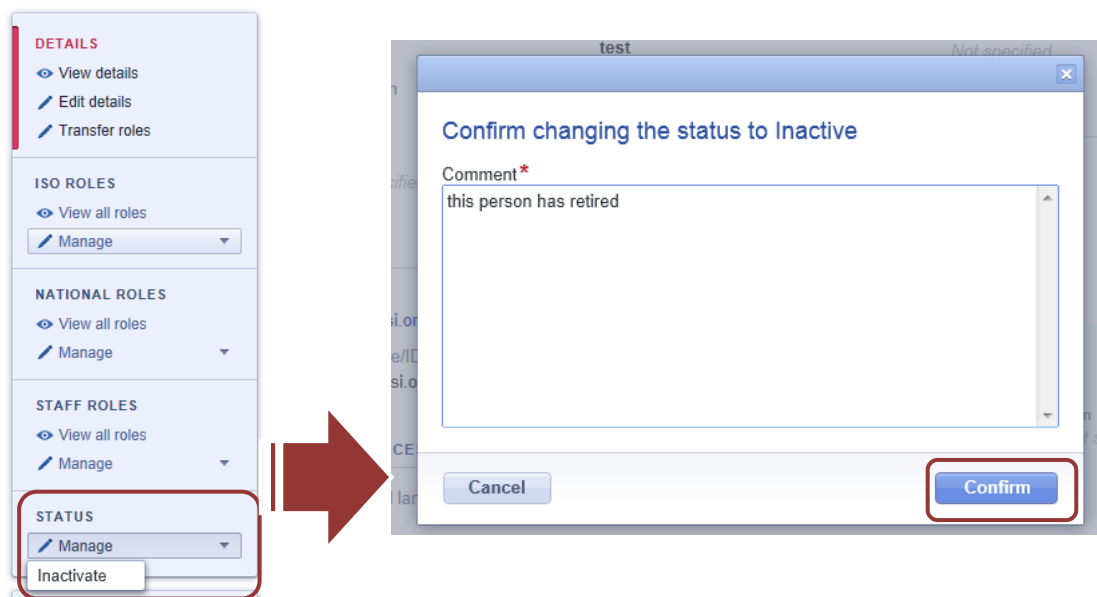4. Click **Confirm**.

Figure 25 – Inactivate a person

4.5 Manage a Person's roles

*As mentioned in section 1.1.7, this new version of the GD allows the assignment of roles to a person to be performed by different organizations. This allows a person to represent different organizations in different roles/ committees. The appointing organization is indicated by the **Appointed by** field on each of the roles assigned to a person.*

*This means that there are no more restrictions on the assignment of roles as long as they comply with the directives. Therefore a User Administrator can assign a role to a person even if his organization is not administering the person's profile (indicated by the **Administrated by** field).*

People's roles are categorized through different subsections of the **Person menu** (see section 4.1.1). In order to manage a particular role, you need to open the relevant subsection.

The GD supports the management of roles in a bidirectional way. This means that a role between a committee and a person, or between a committee and an organization, or between a person and an organization can be edited by going through either of the two entities in the relationship.

You can therefore assign a role in a committee to a person by opening the person's record, or by opening the committee's record.

All GD roles are defined in the Annex 1 of this user guide.

*Refer to the **CEN supplement** Annex 1 to have the CEN GD roles.*

4.5.1 Editing roles

To edit a person's roles, open the person's profile. Select the relevant subsection of the **Person Menu**, then:

  a) Either click **Manage** and select the role you wish to update from the drop-down list,

  b) Or browse the person's roles, and click the **Edit icon** ✏ edit next to the role you wish to update.

The drop-down list only shows roles you are entitled to modify.

Figure 26 – Manage a Person's roles

The next screen, the role edition screen, lists the corresponding roles the person is already assigned to and that you manage.

a) To edit or delete an existing role, click on the corresponding icons next to the role.

b) To add a new role, search for the committee either using the **drop-down list** and click **Add** or using the **Add multiple assignments**

> *In the drop-down list you can type part of the committee reference in order to filter it down.*
>
> *E.g.: tc 10, sc 3, tc 10/sc 1, tc 10/wg*

Figure 27 – Edit/Delete a role

Use the drop-down list to quickly add a role on one committee.

The **Add multiple assignments** allows you to assign the role to more than one committee.

Figure 28 – Add a new role committee

Once all changes were made, save your changes by clicking on **Save changes** on the left of the screen.

Figure 29 – Save changes

⚠️ *If you close or quit the edition screen before clicking* **Save changes***, the changes in role assignments will be discarded.*

4.5.2 Roles metadata

Each role has a set of metadata associated. Metadata differ between roles and some metadata are mandatory, while some are optional.

To update a role's metadata, click on the **Edit icon** ✏️ while editing roles (in the role edition screen).

Figure 30 – Edit a role's metadata

This will display the metadata window, fill in the mandatory fields (if any) and click **Add**.

Figure 31 – Example of Metadata on roles

The set of metadata differs between roles. The possible metadata values you can update are:

Metadata	Description
Notification email for the role	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	Add a comment to a role assignment.
Ballot type *(mandatory metadata)*	When assigning balloting roles, you will be asked to indicate for which ballot (CIB, DIS, FDIS, SR). *cen There are different types of ballot at CEN. Refer to the **CEN supplement** section 3.1 to see the different types of ballot at CEN.*
Stakeholder category *(mandatory metadata)*	When assigning experts to an **ISO working group**, you will be asked to indicate the stakeholder category that most closely reflects his or her background. More information on stakeholders' category is given in Annex 2 at the end of the user guide. *cen Stakeholder categories are not displayed for the moment at CEN (will be defined later).*
Function / Alternate function title	When assigning a person as "employee of an organization", you can indicate his function in the organization and if needed, enter his effective title to the function. E.g. function=CEO; alternative title=Secretary General.
Main point of contact	When registering a new User administrator, you can designate it as main point of contact for your NSB. ⚠ *A NSB can only count one point of contact amid the User administrators.*

Figure 32 – Description of Roles metadata

4.5.3 Multiple assignments:

You can use the multiple role assignments feature to add several committees for a same role.

For instance, to assign multiple roles:

1) Open the **Manage** menu under **ISO roles**
2) Select the appropriate committee role
3) Click on **Add multiple [role's name] roles**
4) Search the parent committee you wish to assign and then select the committees you wish to add for this role
5) Click Add
6) Then click **Save changes**.

> *This feature is limited to the roles of **Secretary Support Team**, **Committee member**, **Voter**, **Ballot Monitor** and **all National Roles**.*

> *Refer to the **CEN supplement** section 3.2 to have the additional CEN roles supported by this feature.*

Figure 33 – Add multiple assignments

Figure 34 – Multiple assignments

> ⚠️ When a Metadata is required, once selected this metadata will apply to all concerned committees
>
> For the committee member role, you cannot add committee members at WG and TC (or TC/SC) level at the same time. At WG level a stakeholder category is required. As this mandatory metadata doesn't apply at TC or TC/SC level, if you need to add committee members for TC (or SC) and WG committees, you need to add them separately.
>
> This feature is used to assign roles but not to edit them (e.g. change a metadata)

> cen Note that the above constraint do not apply when assigning multiple CEN roles. Indeed since CEN has not yet implemented stakeholder categories, it is possible to add committee members at CEN working groups and TC (or TC/SC) level at the same time.

4.5.4 Centralized roles

> *Currently centralized roles only apply to __ISO committees and subcommittees __ where your __Organization is registered as P- or O-member__*.

Centralized roles are managed in the **ISO roles** section of the **Person menu**.

Editing a centralized role is similar than any other committee role, except that instead of selecting a committee, you need to select the Organization for which the role applies.

For instance, to assign a Centralized document monitor:

1) Open the **Manage** menu under **ISO roles**
2) Select the role Centralized document monitor
3) In the role edition screen, select the appointing Organization
4) Click **Save changes**.
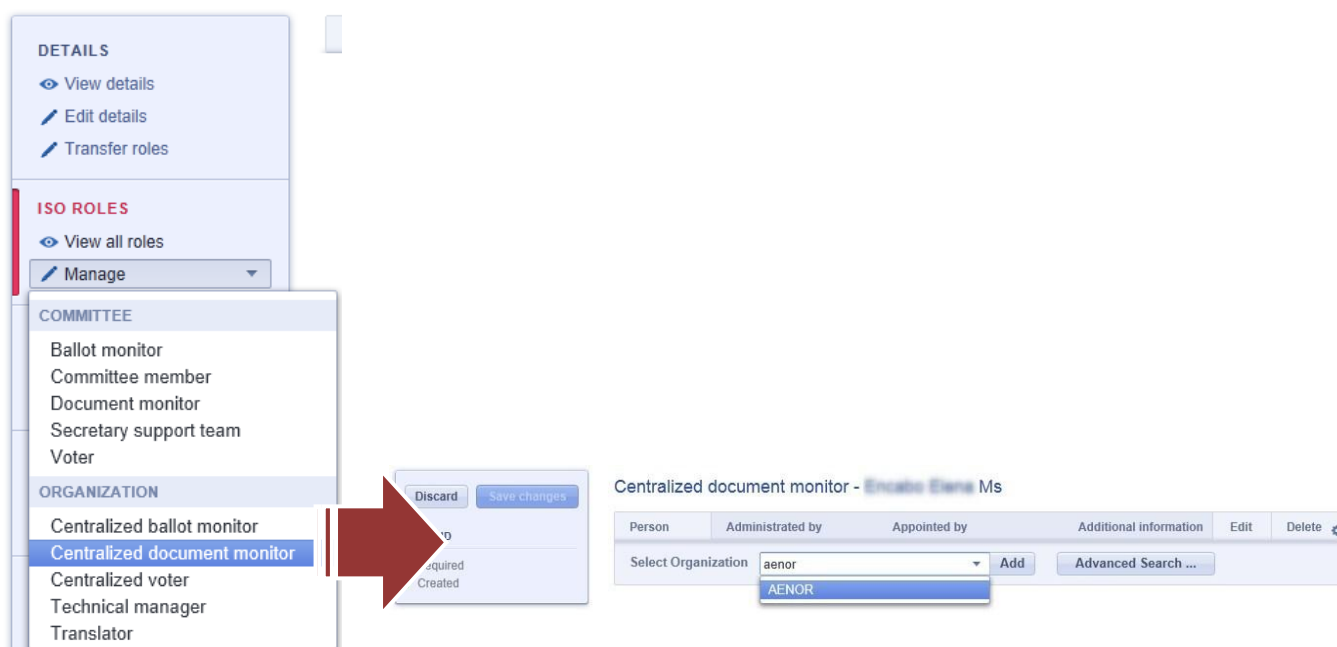
Figure 35 – Assign a Centralized role

4.5.5 Transfer roles from one person to another

You can use the role transfer functionality to transfer the roles from one person to another.

This feature is limited to the roles of **Committee member**, **Voter**, **Ballot Monitor, Document Monitor** and **all National Roles** and does not apply to Centralized roles.

Note that:

* Metadata cannot be edited during the role transfer,
* Optional metadata on roles, such as comment, won't be transferred to the new person,
* Mandatory metadata will be transferred.

To do this, start with opening the profile of the person from whom the roles should be transferred and then click **Details > Transfer roles**.

The role transfer screen opens (see below). First search for the person who should receive the roles, then select the possible roles you can transfer to that person. Click **Save changes** to complete the transfer.

Figure 36 – Transfer roles

The role transfer screen will only list the different roles **appointed by** your organization.

The system may reject some roles to transfer (indicated by the icon ⃠) in the case of closed groups, or roles managed centrally by ISO/CS or CCMC.

If the selected person already has some of the roles to transfer (indicated by the icon ⧉), the system won't transfer them either.

Once the role transfer has completed, a new tab will open with the profile of the person who has received the roles.

4.6 User Account Management

4.6.1 Re-send activation email

When a person is created in the GD, an email is automatically sent to the person with his/her login information (username and a link to set his/her password). The user has 3 days to set his/her password to activate the account. Pass this 3 days the user will no longer be able to use the link in the email and as User Administrator you will need to re-send the activation email.

Until the user activates his account (i.e. by clicking on the link in the email received and chosen a password), you will see that his account is **pending activation.** As long as the user has not chosen a password, he cannot log in ISO applications.
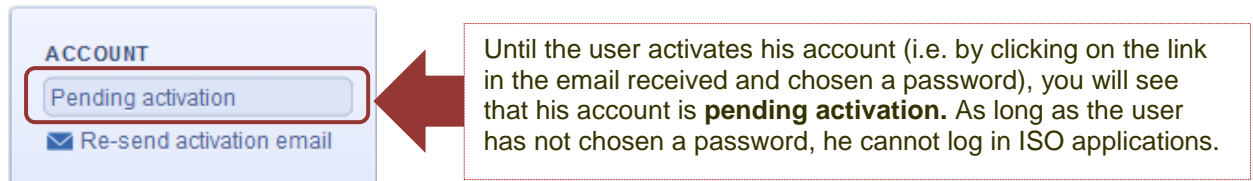
To re-send the activation email, search for the person in GD, open his/her profile and click on **Re-send activation email** in the Account section of the **Person Menu**.

Click on **Confirm** to re-send the activation email

Figure 37 – Person details - Re-send activation email

*You may sometimes have the message **Account not in sync!** displayed. This means that there has been a problem with the synchronization of the username preventing the email of activation to be sent.*

*To resolve this issue, just click on the **Sync account** button. This action will automatically send an activation email to the user. Should the error message not disappear, please contact helpdesk@iso.org*
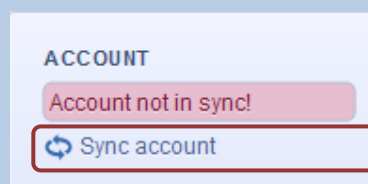
4.6.2 Force a user's activation

At a user request you can force the account activation for the user.

To do this open the profile of the person, and select **Account > Force account activation** from the **Person menu**. You can generate the proposed password or modify it and then click on **Confirm**.
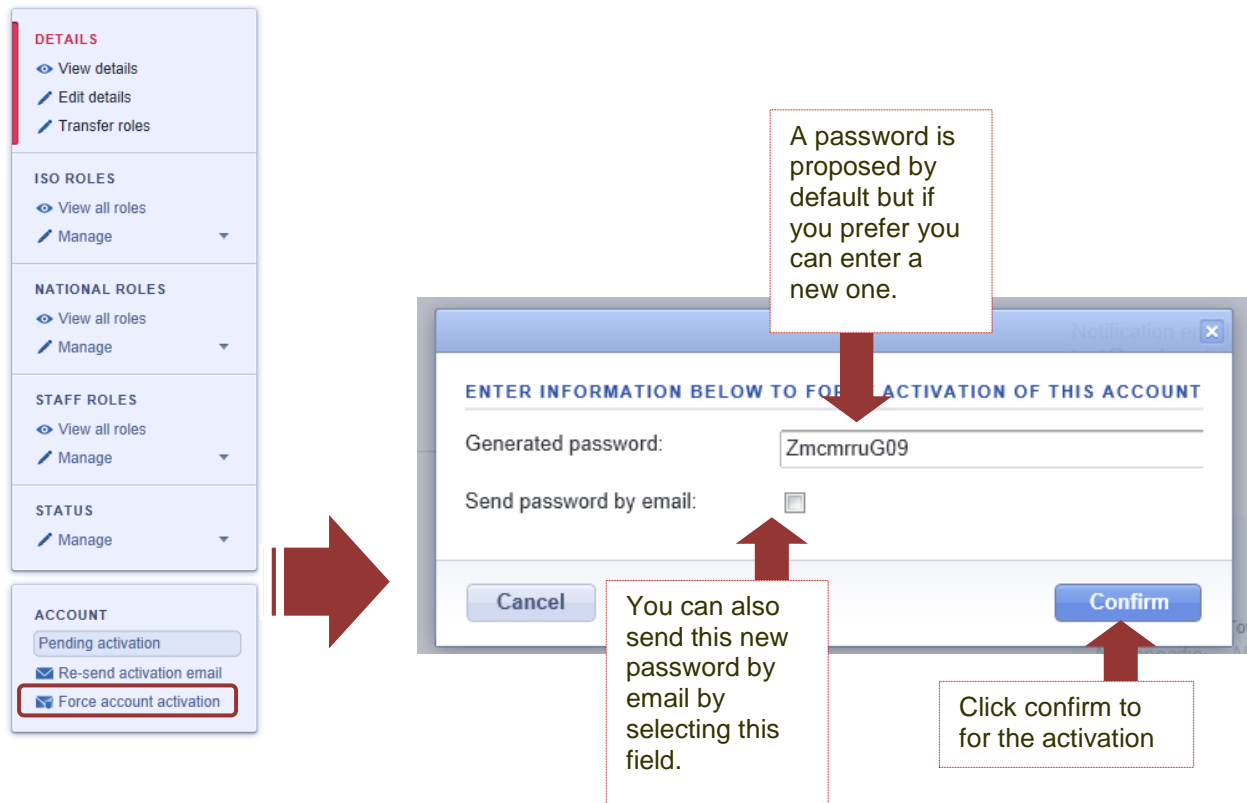
Figure 38 – Person details – Force account activation

4.6.3 Reset a user's password

At a user request you can trigger a password reset for the user.

To do this open the profile of the person, and select **Account > Reset password** from the **Person menu**. Click OK on the confirmation window, an email with instructions will be immediately sent to the user.

Figure 39 - Person details – Reset password

4.6.4 Force a user's password

At a user request you can force a password for the user.

To do this open the profile of the person, and select **Account > Force password** from the **Person menu**. You can generate the proposed password or modify it and then click on **Confirm**.

⚠️ *A password must contain 8 characters at least (with 2 letters at least and 2 numbers at least) and should not contain any of the ISO or CEN acronyms such as TC, SC, WG etc*

Figure 40 - Person details – Force password

5 Organizations management

In the Global Directory, "Organizations" is a general term that includes ISO (or CEN) members, International and Regional organizations, and national organizations.

ISO members and ISO international organizations' details are managed centrally by ISO/CS (even if their profile is not indicated as Administrated by ISO). Any request for change should be sent to helpdesk@iso.org.

CEN members' details are managed centrally by ISO/CS*. Any request for change should be sent to helpdesk@iso.org.*

CEN international organizations at European level *are managed centrally by CCMC. Any request for change should be sent to Dataservice at CCMC: dataservice@cencenelec.eu*

As a User administrator you are responsible for managing the roles and details of your ***national organizations.*** To manage an organization in the GD, you need to first search for it and open its profile.

From the organization's profile, you have access to all the organization's details and roles as well as the menu to allow you to manage them.

5.1 View an organization's details and roles

5.1.1 Organization menu

On the left side of an organization's profile is displayed the **Organization menu** that will allow you to manage its details and roles.

The below figure gives an overview of the different menu items:

Details allow you to view and manage the basic information of the organization.

ISO roles display the organization's roles within ISO committees (e.g. Secretariat, P-membership). The Manage menu is only available for your Member Body Organization and allows you to Manage centralized roles.

CEN roles* display the organization's roles within CEN committees (e.g. Secretariat). The Manage menu is only available for your Member Body Organization and allows you to Manage centralized roles.

Staff roles allow you to view and manage the employees of the organization including their functions and titles as well as the Member body user administrators for your organization.

Liaisons display the different liaisons in committees registered for the organization.

Status allow you to manage the status of the entry (active, inactive/withdrawn). This menu item is not available for ISO Member bodies which status is centrally managed by ISO/CS

Figure 41 - Organization menu

⚠️ * *The CEN roles menu section is only available to **CEN Members' user administrators**.*

ℹ️ *An **ISO (or CEN) Member Body organization** can easily be identified by this symbol:*

To view an organization's details or role click on **View details** or **View all roles** respectively in the relevant organization menu item. Once all roles are displayed, use the **Jump To** links to jump to the relevant role.

Figure 42 – View all ISO Roles of an organization

If an organization has too many roles to display in a particular view, you will receive the following warning message, asking you to export the list in Excel file.

Figure 43 – View all roles – Warning message

5.1.2 Organization Summary banner

On the top of every organization's profile a **Summary Banner** gives an overview of the roles the organization holds and the number of staff the organization counts, and more specific data such as the organization administering this entry details, its status and some system information (e.g. last update date).
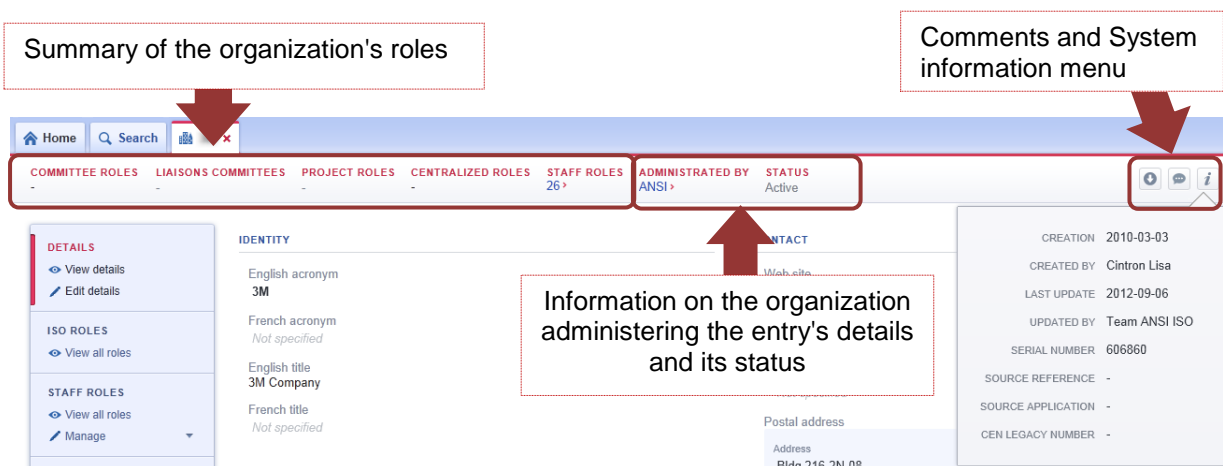
Figure 44 - Organization Summary banner

5.2 Register a new Organization

You can register a new organization from the **Home** page by selecting **Organizations > Create New Organization**.

> It is always recommended to first search for the organization in GD, to make sure it has not already been registered.
>
> If the search returns no results, a direct link **Create new organization** is displayed.
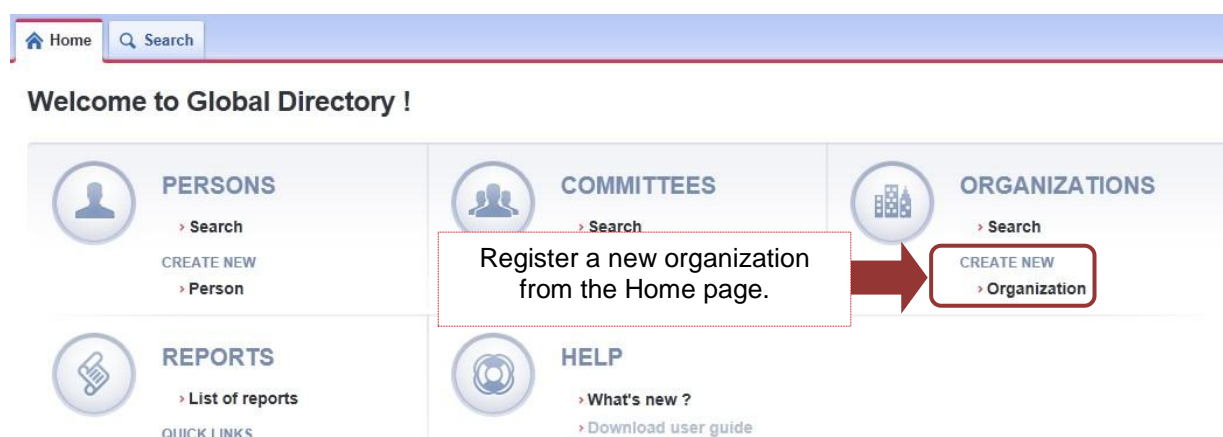
Figure 45 – Register an organization from the Home page

Figure 46 - Register an organization from the Search results page

In the creation screen, enter values for all **mandatory fields** (marked with a red *) and click **Confirm Creation** on the left side of the screen when you are done.

Figure 47 – Update organization's details and confirm creation

Two national organizations with the same English acronym can exist in the system as long as they are not administered by the same organization.

The below table provides some details on the different fields to edit:

Fields	Description
English* / French acronym *(*mandatory field)*	This free-text field supports special characters.
English* / French title *(*mandatory field)*	This free-text field supports special characters.
Preferred language	By default set to English. This is for information only and may be used for communication purposes.
Web site	Official web site of the organization.
Email	Email address to contact the organization.
Telephone	This section allows you to register multiple phones or fax numbers. ⚠️ *Phone/Fax numbers must start with either 00 or +.*
Postal / delivery address	This is a free-text field. ⚠️ *This field is optional, but if you start entering an Address, then Town and Country become required (vice versa).*

Figure 48 – Organization's details – Field Description

Once the new entry is created, your Organization is set as the one administering its details. This is shown in the **Summary banner** under the section **Administrated by**.
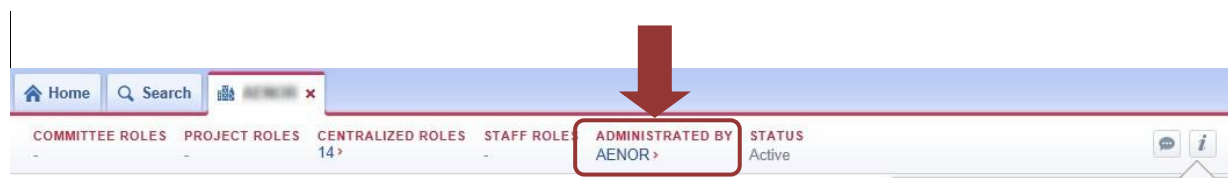
5.3 Modify an organization's details

As a User Administrator, you are responsible to manage the details for the organizations you are administering in GD.

> *The Organization responsible for a profile is indicated by the field **Administrated by** in the **Summary banner**.*

> *ISO members and ISO international organizations' details <u>are managed centrally by ISO/CS</u>. Any request for change should be sent to helpdesk@iso.org.*

> ***CEN members' details are managed centrally by ISO/CS**. Any request for change should be sent to helpdesk@iso.org.*
>
> ***CEN international organizations at European level** are managed centrally by CCMC. Any request for change should be sent to Dataservice at CCMC: dataservice@cencenelec.eu*

To modify an organization's details, search for the organization, open its profile by clicking on the entry in the search results, and select **Details > Edit details** from the **Organization menu**.

All fields that you are allowed to update will then become editable. Once you have performed the required changes, click on **Save changes** on the left side of the screen.

Figure 49 – Edit an Organization's details

> *In the edit screen, **mandatory fields** are indicated by * and **modified fields** are indicated by*

5.4 Inactivate an Organization (manage an organization's lifecycle)

As a User Administrator, you are responsible to manage the lifecycle for the national organizations you are administering in GD.

Deletions are not permitted in the GD in order to keep historical information. Therefore organizations no longer active shall be inactivated.

> ℹ️ ***There is one exception to deletion.*** *If an organization has been created by mistake, you can delete it within a period of 2 days. Note that to delete an organization, you must inactivate it first.*

An organization can only have two possible statuses in GD: **active** or **inactive/withdrawn**.

> ⚠️ *An organization can be inactivated if it has NO MORE roles assigned*

> ⚠️ *ISO members and ISO international organizations' status is managed centrally by ISO/CS. Any request for change should be sent to* *helpdesk@iso.org.*

> cen ***CEN members' details are managed centrally by ISO/CS.*** *Any request for change should be sent to* *helpdesk@iso.org.*
>
> ***CEN international organizations at European level*** *are managed centrally by CCMC. Any request for change should be sent to Dataservice at CCMC:* *dataservice@cencenelec.eu*

To inactivate an organization, open its profile, and select **Status > Inactivate/Withdraw** from the **Organization menu**.
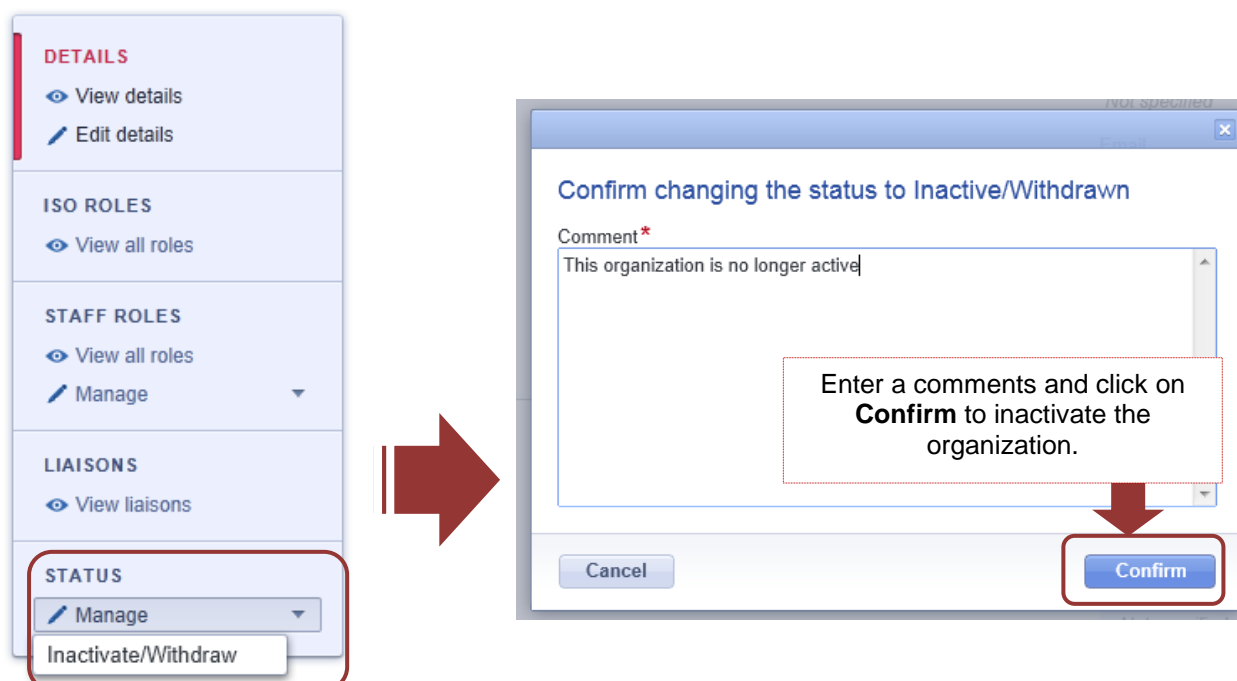
Figure 50 – Inactivate an Organization

Confirm the inactivation in the popup window displayed, and enter a comment, click **Confirm**.

⚠️ *For traceability purpose, a **comment is mandatory** when inactivating an organization.*

5.5 Manage roles from an Organization's profile

Similarly to what is mentioned in section 0, a role between a person and an organization can be edited from the profile of either of the two objects. You can therefore manage roles from the organization's profile.

Organization's roles are categorized through different subsections of the **Organization menu** (see section 5.1.1). In order to manage a particular role, you need to open the relevant subsection.

All GD roles are defined in the Annex 1 of this user guide.

cen *Refer to the **CEN supplement** Annex 1 to have the CEN GD roles.*
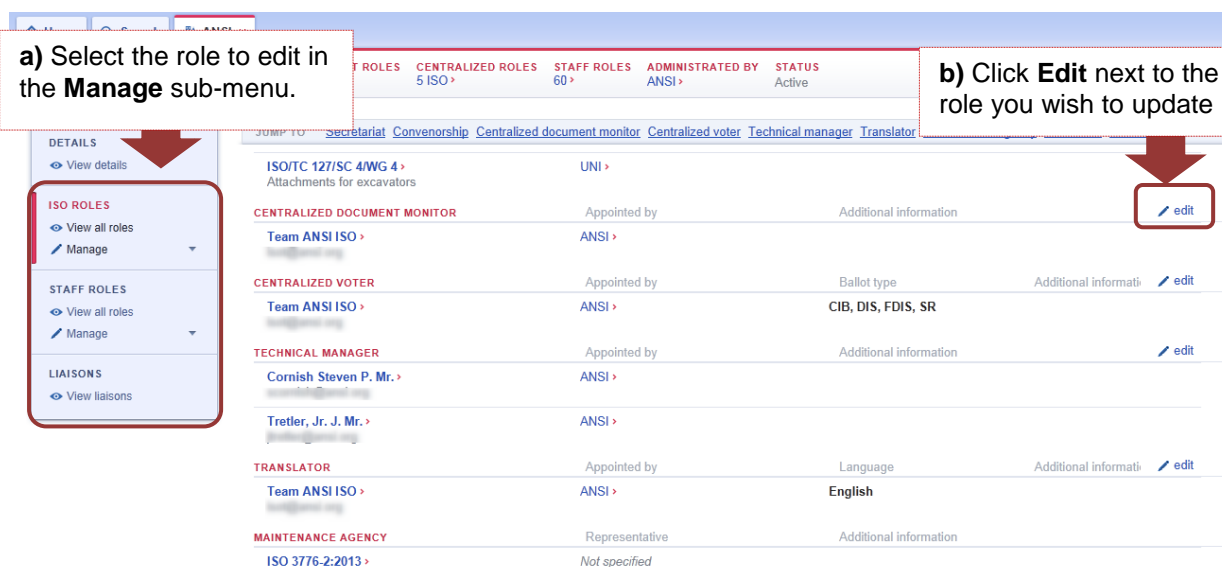
5.5.1 Editing roles

To edit roles from the organization's profile, open its profile. Select the relevant subsection of the **Organization Menu**, then:

    a)   Either click **Manage** and select the role you wish to update from the drop-down list,

    b)   Or browse the roles, and click the **Edit icon** ✏ edit next to the role you wish to update.

⚠️ *The drop-down list only shows roles you are entitled to modify. The ISO (or CEN) roles can only be modified for your Member Body Organization (e.g ANSI)*

Figure 51 – Editing organization roles

The next screen, the role edition screen, lists the corresponding roles that already exist and that you manage.

   a) To edit or delete an existing role, click on the corresponding icons next to the role.
   b) To add a new role, search for the committee using the **drop-down list** and click **Add**.

> *When searching for a person, you can use the person's name or account email address.*

Once all changes are made, save your changes by clicking on **Save changes** on the left of the screen.

Figure 52 – Add/Delete a role

> ⚠ *If you close or quit the edition screen before clicking **Save changes**, the changes in role assignments will be discarded.*

5.5.2 Roles metadata

See section 4.5.2.

5.5.3 Centralized roles

> *Currently centralized roles only apply to __ISO committees and subcommittees__ where your __Organization is registered as P- or O-member__.*

> cen *Refer to the **CEN supplement** section 4.1 to have the CEN specificities concerning the centralized roles.*

Centralized roles are managed in the **ISO roles** subsection of the **Organization menu**.

   1) Open the **Manage** menu under **ISO roles**
   2) Select the role you wish to assign
   3) In the role edition screen, select the person
   4) Click **Save changes**.

Figure 53 – Assign a Centralized role

6 Committees management

The GD is the central repository for managing International (ISO, ISO/IEC), Regional (CEN[7]) and National committees (for ISOlutions[8] and National eCommittees Lite (NTClite)[9] users).

- International committees are managed centrally by ISO/CS,
- Regional committees are managed centrally by CCMC,
- National committees are managed by their respective National Standardization Body (NSB).

The attributes of International, Regional and National committees may differ:

- International committees have Liaisons and Organizations roles;
- National committees can map International/Regional committees.

This is why the following section will treat International/Regional committees and National committees separately.

6.1 View a committee's details

⚠️ *The Committee menu differs between a National committee and an International/Regional committee.*

E.g. International committees have a Liaison subsection, whereas National committees have a Committee mapping subsection.

6.1.1 International/Regional committee menu

On the left side of an International or Regional committee's profile is displayed the **Committee menu** that will allow you to manage and display its details and roles.

The below figure give an overview of the different menu items in the case of an International/Regional committee:

Details display the basic information of the committee.

Structure displays the full hierarchy of the committee (TC, SC, and WG).

ISO roles display the roles organizations may have on the committee (e.g. Secretariat, Convenorship) and allow you to manage the roles of persons in the committee.

Liaisons display the different liaisons organizations may have registered in the committee.
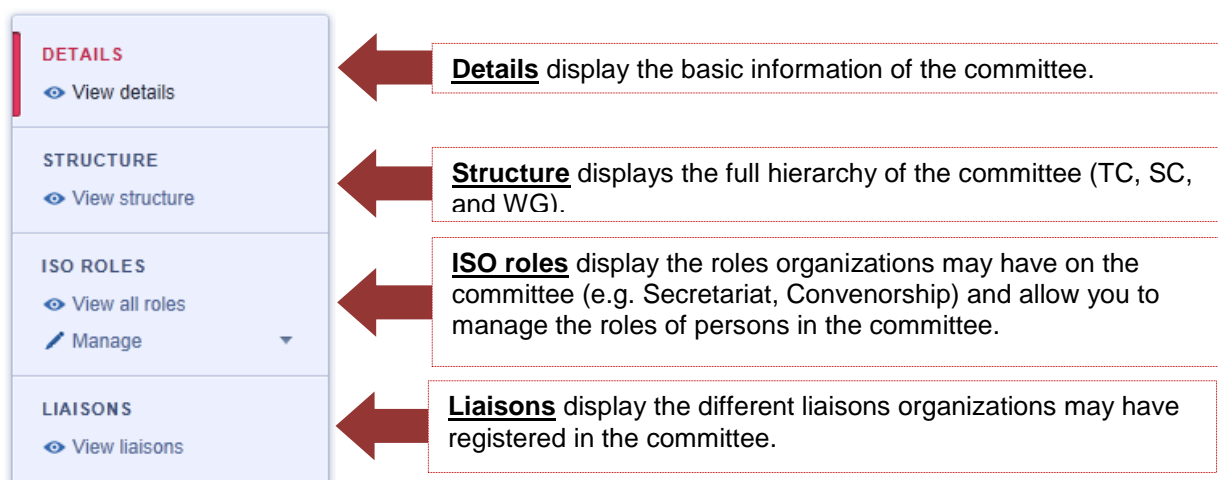
Figure 54 – International/Regional committee menu

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[7] CEN corresponds to the European Committee for Standardization (www.cen.eu).

[8] ISOlutions is a set of applications to support members performing National, Regional and International standardization work using IT solutions hosted through ISO

[9] National eCommittees Lite (NTCLite) is a service provided by ISO to allow automatic dissemination of International and/or Regional standardization work documents at the National level.

> **cen** *For **CEN Committees**, the "ISO ROLES" menu section is replaced by "CEN ROLES".*

6.1.2 National committee menu

On the left side of a National committee's profile is displayed the **Committee menu** that will allow you to manage its details and roles.

The below figure gives an overview of the different menu items in the case of a National committee:

Details allow you to view and manage the basic information of the committee.

Structure displays the full hierarchy of the committee (TC, SC, and WG) and allows you to create sub-committees and working group.

National roles allow you to view and manage the roles of persons in the committee.

Committee mapping allows you to view and manage the mapping of International or Regional committees (for automatic document dissemination).

Status allows you to manage the status of the committee (in progress, active, standby/dormant, under review, disbanded).

Figure 55 – National committee menu

6.1.3 Committee Summary banner

On the top of every committee's profile a **Summary Banner** gives an overview of the committee structure and roles, as well as more specific data such as the organization administering the committee, its status and some system information (e.g. last update date).
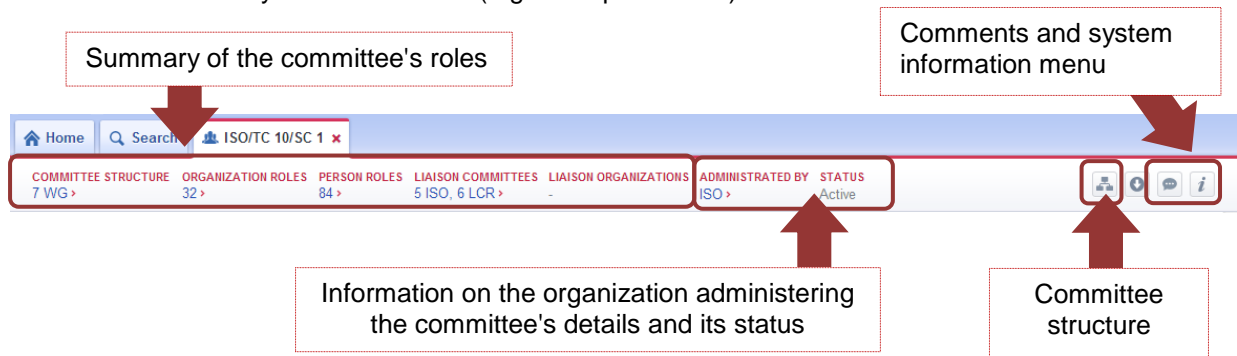
Figure 56 - Committee Summary banner

6.2 Manage roles from an International/Regional Committee's profile

As a User administrator you are responsible for managing national representatives and experts roles in International or Regional committees.

As mentioned in section 0, a role between a person and a committee can be edited from the profile of either of the two objects. You can therefore manage person roles from the committee's profile.

You need to first search for the committee and open its profile. From the committee's profile, you have access to all the committee's details and roles as well as the menu to allow you to manage them.

Committee's roles are categorized through different subsections of the International/Regional **Committee menu** (see section 6.1.1). In order to manage a particular role, you need to open the relevant subsection.

All GD roles are defined in the Annex 1 of this user guide.

> *Refer to the **CEN supplement** Annex 1 to have the CEN GD roles.*

6.2.1 Editing roles

To edit roles from the committee's profile, open its profile, then select the relevant subsection of the **Committee Menu**, then:

    a)   Either click **Manage** and select the role you wish to update from the drop-down list,

    b)   Or browse the roles, and click the **Edit icon** ✏ edit next to the role you wish to update.

Or browse the roles, and click the **Edit icon** ✏ edit next to the role you wish to update.

> ⚠ *The drop-down list only shows roles you are entitled to modify.*

Figure 57 – Manage a Person's roles from the Committee profile

The next screen, the role edition screen, lists the corresponding roles that already exist and that you manage.

   a) To edit or delete an existing role, click on the corresponding icons next to the role.
   b) To add a new role, search for the committee using the **drop-down list** and click **Add**.

> *When searching for a person, you can use the person's name or account email address.*

Once all changes are made, save your changes by clicking on **Save changes** on the left of the screen.

Figure 58 – Add/Delete a role

> *If you close or quit the edition screen before clicking **Save changes**, the changes in role assignments will be discarded.*

6.2.2 Roles metadata

See section 4.5.2.

6.2.3 Centralized roles

Centralized roles are roles between a person and an organization that applies to all International and Regional Committees. Therefore these roles can only be managed from the person or the organization's profile (refer to sections 4.5.4 and 5.5.3).

6.3 Manage National Committees and roles in National Committees

As a User administrator you are responsible for managing your National committees and roles within.

As mentioned in section 0, a role between a person and a committee can be edited from the profile of either of the two objects. You can therefore manage person roles from the committee's profile.

> *The User Administrator responsible for administering a National committee is indicated by the field* ***Administrated by*** *in the* ***Summary banner****.*

You need to first search for the committee and open its profile. From the committee's profile, you have access to all the committee's details and roles as well as the menu to allow you to manage them.

Committee's roles are categorized through different subsections of the National **Committee menu** (see section 6.1.2). In order to manage a particular role, you need to open the relevant subsection.

All GD roles are defined in the Annex 1 of this user guide.

6.3.1 Register a new committee

The registration of a new committee first depends on the level of the committee you wish to create:

- Main committee : TC level
- Sub-committee : SC level
- Working group : WG level

a) Create a Main committee

This is done from the **Home** page by selecting **Committees > Create New Committee**.
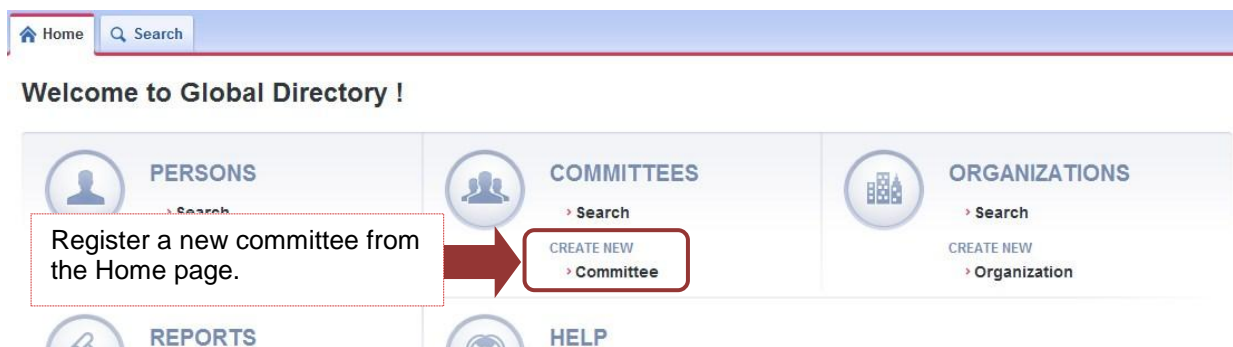
Figure 59 – Register a committee from the Home page

Before going further, you need to select the **Field** of committee you wish to create: **Policy development committee (PDC)** or **Technical committee (TC)**, then click **Next**.

Figure 60 – Select committee field

In the creation screen, enter values for all **mandatory fields** (marked with a red *) and click **Confirm Creation** on the left side of the screen when you are done.

Figure 61 – Update committee's details and confirm creation

See the *Figure 64 – Organization's details – Field Description* for more details on the different fields to edit.

Once the committee is created, its status is set to **In Progress** and your Organization is set as the one administering its details. This is shown in the **Summary banner** under the section **Administrated by**.

> *As long as a committee's status is* **In Progress***, the reference of the committee is still editable.*

> ⚠ *As long as a committee's status is **In Progress**, the committee is not visible in NTC for the National Committee members. The committees In Progress are only visible by the MBUA*

b) Create a Sub-committee or a Working group

This is done from the parent committee's profile. Therefore start with opening the parent committee's profile, then select **Structure > Create Sub-committee** or **Structure > Create Working group**.

Figure 62 – Create a sub-committee or working group from the parent committee

> ℹ *The sub-committee (or working group) inherits from its parent **the committee field** (Policy development or Technical) **and the reference of the parent.***

> ⚠ *Once the committee is created, note that its status is set to **In Progress**. This is only an intermediary status to allow the User administrator to set the details and roles of the new committee before it is active.*
>
> *Once the configuration of the committee is completed, <u>always remember to change its status to **Active** to make it visible to the committee members in NTC and NTCLite</u>. (see section 6.3.3)*

In the creation screen, enter values for all **mandatory fields** (marked with a red *) and click **Confirm Creation** on the left side of the screen when you are done.

Figure 63 – Update committee's details and confirm creation

The below table provides some details on the different fields to edit in the committee creation screen:

Fields	Description
Reference *(mandatory field)*	The reference is composed of an Acronym (mandatory) and a number (optional): • **Acronym**: this free-text field is **mandatory**. ⚠️ *The acronym should never start with ISO, IEC, ISO/IEC, CEN, CENELEC, CEN/CLC or CEN-CENELEC* We recommend you to name your national committee with the following format: <NSB acronym/TC# /SC#/ WG#>. Example: AENOR/TC 02/SC 01/WG 01 • **Number**: this free-text field is **optional** and accepts numbers and letters. If you use the number field, you must at least enter one number. ⚠️ *If you are using numbers always put a zero in front of the single number. E.g. 01, 02, 03, 04 etc…* The **Example of your new reference** gives you a preview of your reference as it will appear in the system. ℹ️ *A sub-committee (or working group) will always inherit the reference of its **parent the committee**.*
National title *(mandatory field)*	This free-text field supports special characters.
National scope	This free-text field supports special characters.
Web site	Official web site of the committee.

Figure 64 – Organization's details – Field Description

6.3.2 Modify National Committee details

As a User Administrator, you are responsible to manage the details for the committees you are administering in GD.

ℹ️ *The User Administrator responsible for a profile is indicated by the field **Administrated by** in the **Summary banner**.*

To modify a committee's details, search for the committee, open its profile by clicking on the entry in the search results, and select **Details > Edit details** from the **Committee menu**.

All fields that you are allowed to update will then become editable. Once you have performed the required changes, click on **Save changes** on the left side of the screen.

Figure 65 – Edit a committee's details

> In the edit screen, **mandatory fields** are indicated by * and **modified fields** are indicated by [icon]

> ⚠ Once a committee has been activated the committee's reference can no longer be modified.

6.3.3 Change the status of a committee (manage the committee's lifecycle)

As a User Administrator, you are responsible to manage the lifecycle of the National committees you are administering in GD.

A committee can have several statuses in GD:

- **In progress**: intermediary status of a committee between its creation and activation. In this status the committee is visible to the committee members in NTC and NTCLite with the label "Being created".

- **Active**: this status removes the label "Being created" and shows the committee as active to its committee members.
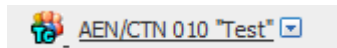
- **Standby/dormant**: status of a committee that has no more active projects. This status puts the committee on hold, but not disband it (i.e. committee members can still be added or removed at this status, but the committee doesn't achieve any work).

- **Under review**: intermediary status similar to the status "in progress".
- **Disbanded**: status of a committee that has finished its work, and where no more projects shall be developed in the future. The committee no longer shows to committee members.

To update the status of a committee, open the committee's profile, and then select **Status > Manage** from the **Committee menu**.

> ⚠️ *A committee can be disbanded **only if it has no more people <u>and</u> committee mappings assigned to it in the GD.***
>
> *A parent committee can only be disbanded if all its children are disbanded.*

Figure 66 – Update the status of a committee

Confirm the change of status in the popup window displayed, and enter a comment, click **Confirm**.

> ⚠️ *For traceability purpose, a **comment is mandatory** when changing the status of a committee!*

6.3.4 Delete a national committee
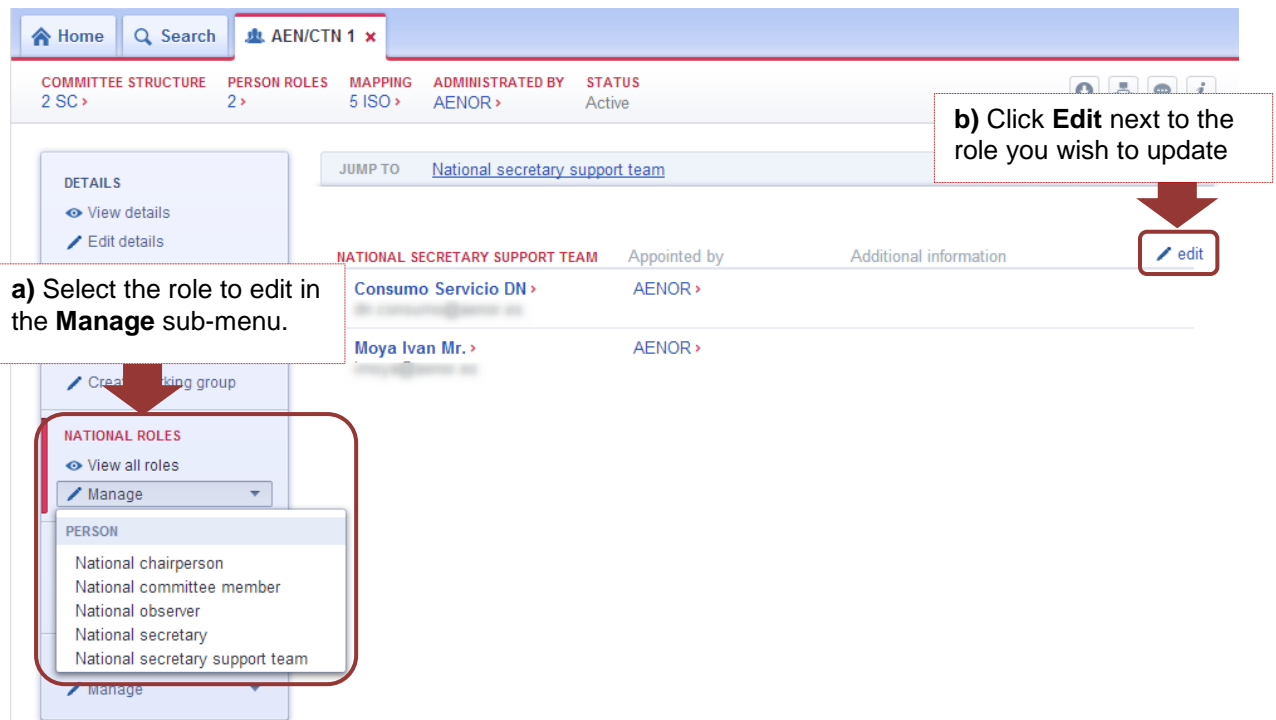
Deletions of national committees are not recommended, but if required:

- you can delete a national committee that has been created less than 48-hours before, you just need to **disband** it first, then click **Delete**;
- to delete an older national committee, disband it first then send a request to helpdesk@iso.org.

6.3.5 Editing Person roles

To edit person roles from the committee's profile, open its profile, then select the relevant subsection **National roles** of the **Committee Menu**, then:

a) Either click **Manage** and select the role you wish to update from the drop-down list,

b) Or browse the roles, and click the **Edit icon** ✏ edit next to the role you wish to update.

Figure 67 – Manage person roles from the Committee profile

The next screen, the role edition screen, lists the corresponding roles that already exist and that you manage.

a) To edit or delete an existing role, click on the corresponding icons next to the role.
b) To add a new role, search for the committee using the **drop-down list** and click **Add**

> *When searching for a person, you can use the person's name or account email address.*

Once all changes are made, save your changes by clicking on **Save changes** on the left of the screen.

Figure 68 – Add/Delete a role

> ⚠ *If you close or quit the edition screen before clicking **Save changes**, the changes in role assignments will be discarded.*

6.3.6 Editing Committee mappings

A national committee can map ISO committees and CEN committees. Mapping an ISO (or CEN) committee will allow your national committee to receive automatically all documents from the mapped committee through the National document dissemination service (as long as the mapped committee's documents are uploaded on Livelink).

> ⚠ *In order to map an ISO committee and therefore receive the documents of that committee, **your organization must be registered as P-Member or O-Member of the ISO committee**.*
>
> *In order to map a CEN committee, your Organization must be **Full Member of CEN**[10].*

To edit the committee mapping, open your national committee's profile, then select the relevant subsection **Committee mapping** of the **Committee Menu**, then:
   a)   Either click **Manage** and select **ISO or CEN Committee Mapping** from the drop-down list,
   b)   Or click the **Edit icon** ✏ edit next to the section **Committee Mapping**.

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[10] CEN corresponds to the European Committee for Standardization (www.cen.eu).

Figure 69 – Manage committee mappings from the Committee profile

The next screen lists the committee mappings that already exist and that you manage.

a) To edit or delete an existing committee mapping, click on the corresponding icons next to it.
b) To add a new committee mapping, search for the committee using the **drop-down list** and click **Add**

Once all changes are made, save your changes by clicking on **Save changes** on the left of the screen.

Figure 70 – Add/Delete a role

6.3.7 Roles metadata

Each national role has a set of metadata associated. Metadata differ between roles and some metadata are mandatory, while some are optional.

To update a role's metadata, click on the **Edit icon** while editing roles (in the role edition screen).

Figure 71 – Edit a role's metadata

This will display the metadata window, fill in the mandatory fields (if any) and click **Add**.

Figure 72 – Example of Metadata on roles

The set of metadata differs between national roles. The possible metadata values you can update are:

Metadata	Description
Notification email for the role	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	Add a comment to a role assignment.
With automatic national positioning ballot *(mandatory metadata)*	This metadata is available on **committee mappings** of ISO (or CEN) committees. It allows the automatic creation of a national ballot to reach consensus on the national position for ISO (or CEN) ballots. ⚠ *This feature is only effective for ISOlutions members that are using the National eBalloting (NEB) application.*

Figure 73 – Description of Roles metadata

6.3.8 Centralized roles

National committees don't have centralized roles.

7 Reports

Three predefined reports allow User Administrators to extract specific information from the GD for data quality checking purposes:

- **Experts' roles in committees**: lists all active experts in committees representing your Organization and their roles in the committees.
- **Users administrated by an organization:** lists of all users (active and inactive) that are administrated by your organization.
- **User administrators of GD:** lists all registered User administrators of the GD per NSB including their main point of contact.

You can access the reports section from the **Home** page.
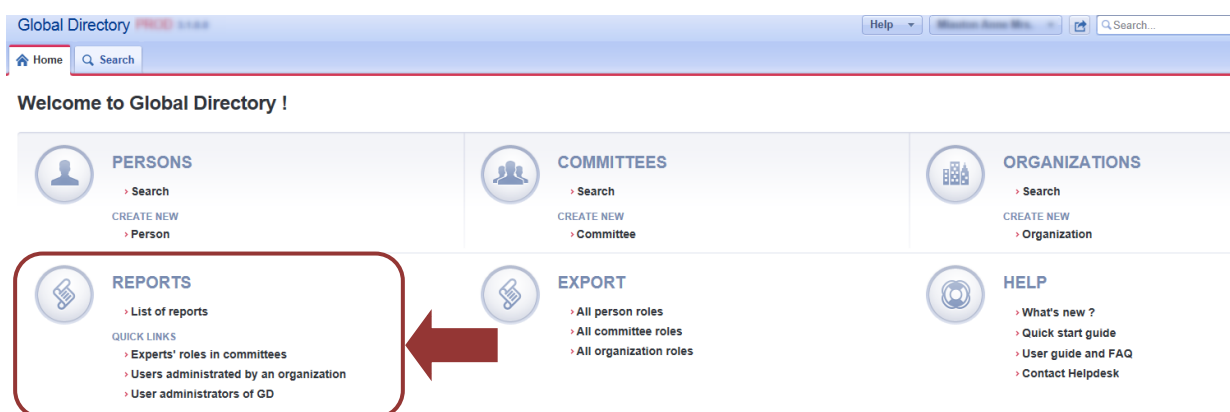
Figure 74 – Reports

To open the report's generation page, click on the report's name, either from the **List of reports** or select it directly from the **Quick links**.

Select the Organization (for the first two reports), then click **Generate Excel file**. For the *Experts' roles in committees* you will also need to select the domain: National or International (i.e. National roles or International roles).
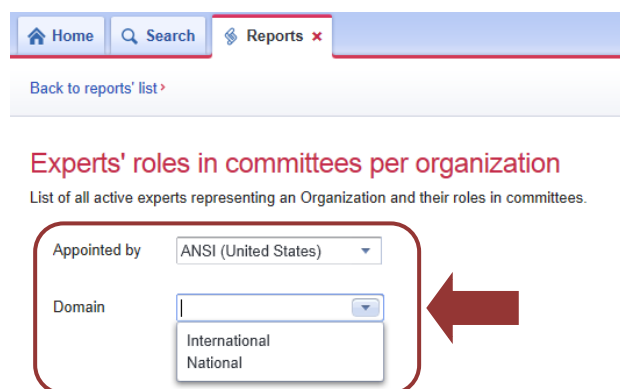
Figure 75 – Generate Experts' roles in committees report

> *CEN Members will also have the possibility to select the domain 'Regional' (i.e. European roles).*

*If your internet browser asks you to **Open** or **Save/Download** the file, it is recommended to always select **Save/Download** in order to avoid any error message.*

8 Exports

On the home page, three exports allow User Administrators to export information from the GD:

- All person roles: lists all roles for a specific person.
- All committee roles: lists all roles for a specific committee.
- All organization roles: lists all roles for a specific organization.
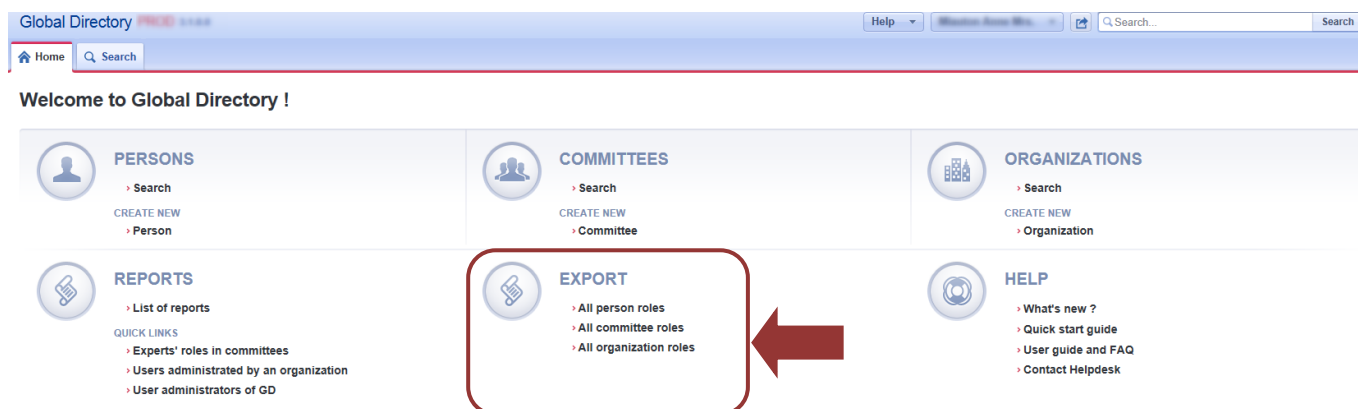
Figure 76 – Exports from the Home page

You can also export all the roles of an entity directly from the entitys' profile (person, organization or committee) using the ⊘ button in the summary banner.
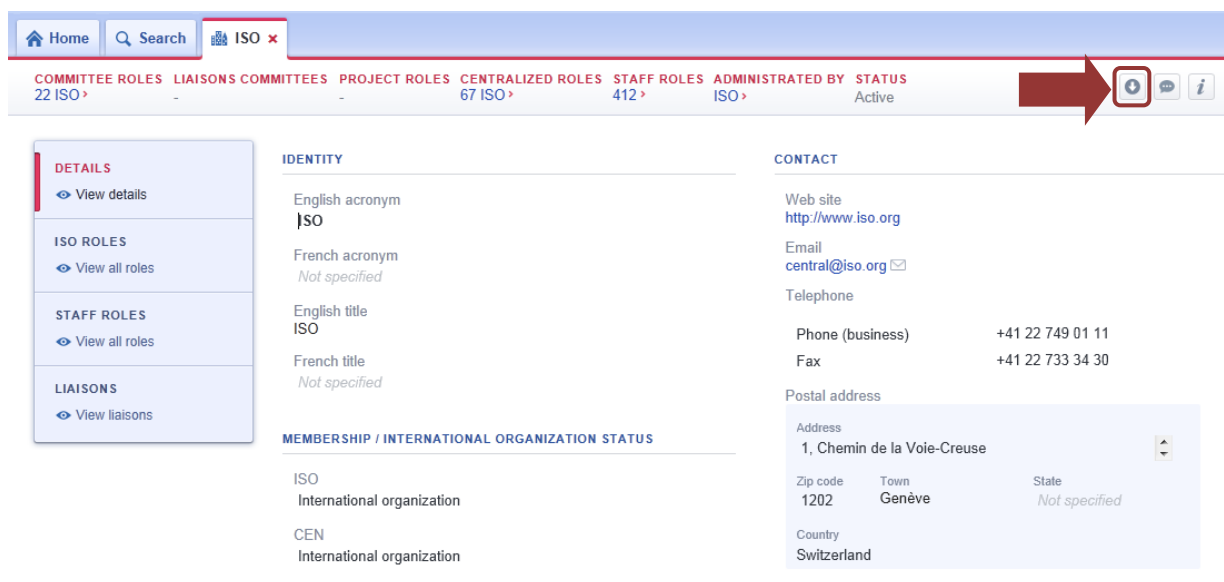
Figure 77 – Exports from an entity's profile

9 Annex 1 – Roles, their definitions and associated permission settings

> *Refer to the **CEN supplement** Annex 1 to have the CEN roles.*

9.1 Roles in Committees or Working Groups

9.1.1 Organization roles in International committees

Roles in the GD	Administered by	Role definitions
P-member	ISO/CS	Member bodies that actively participate in the work of the committee, with an obligation to vote.
O-member	ISO/CS	Member Bodies who follow the work of the committee without actively participating.
Secretariat	ISO/CS	Official secretariat role.
Secretariat administrated by	ISO/CS	Delegated Secretariat appointed by the official Secretariat.
Twinned secretariat	ISO/CS	Twinning is designed to enable a member body in a developing country to seek assistance from a member body in a developed country.
Convenorship	ISO/CS	The member body through which the convenor can be contacted.
Twinned convenorship	ISO/CS	The member body through which the twinned-convenor can be contacted.
Maintenance Agency (MA)	ISO/CS	Organization that ensures a follow-up for a specific standard (e.g. Country Codes).
Registration Authority (RA)	ISO/CS	Organization that ensures a follow-up for a specific standard maintained using a registration system (e.g. ICANN for internet addresses)
A-Liaison	ISO/CS	Type of liaison organization
B-Liaison	ISO/CS	Type of liaison organization
C-Liaison	ISO/CS	Type of liaison organization for ISO/IEC JTC1
D-Liaison	ISO/CS	Type of liaison organization for all WGs (except ISO/IEC JTC1 WGs)
Liaison committee	ISO/CS	Liaison between committees (one way): Secretary of one committee can see documents in the other committee. This role includes: Liaisons between ISO committees, ISO and IEC committees.

9.1.2 Person roles in International committees

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) access to committee documents b) access to the balloting application c) others
Secretary (TC or SC)	ISO/CS	Individual providing day-to-day management and administrative services for the work of a technical committee or subcommittee. One individual only. Mandatory role for all TCs and SCs.	a) All permissions on committee documents b) Full access to CIB ballots of the committee, read access to DIS/FDIS/SR closed ballot c) Access to the PDF files of standards for the committee via the STADIST newsletter
Twinned Secretary (TC or SC)	ISO/CS	Individual appointed by another member body, who supports the main member body in providing the functions of secretary. One individual only.	Same as Secretary
Secretary support team (TC or SC)	User Administrators or ISO/CS (for closed groups)	Assistant(s) or support staff of the secretary of a committee. One or more individuals.	a) Same as Secretary b) Same as Secretary c) -
Convenor (WG)	ISO/CS	"Chair" of a working group.	a) All permissions on committee documents b) Full access to WG consultations c) -
Twinned Convenor (WG)	ISO/CS	Individual appointed by another member body, which supports the main member body in providing the functions of convenor.	Same as Convenor
Secretary (WG)	ISO/CS	Secretary of a working group. This role is optional for WGs.	Same as Convenor
Secretary / Convenor support team (WG)	ISO/CS	Assistant(s) or support staff of the secretary or convenor of a working group. One or more individuals.	Same as Convenor
Chairperson	ISO/CS	The chairman of a TC is responsible for the overall management of that technical committee, including any subcommittees and working groups. One individual only.	a) Read access to all committee documents b) Can see open & closed ballots

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) access to committee documents b) access to the balloting application c) others
			c) -
Vice-Chairperson	ISO/CS	Chairperson appointed by another member body, who supports the main member body in providing the functions of chair. One individual only.	Same as chairperson
Chairperson support team	ISO/CS	Assistant(s) or support staff of the chair of a committee	Same as chairperson
Committee member	User Administrators or ISO/CS (for closed groups)	Committee member includes the following: - **Member body representative** participating actively (P-member) or with an observer status (O-member) in the work of a TC or SC - **Expert in a WG** (driven on the P-membership of the parent committee). ⚠️ *A committee member in a WG or JWG must be registered with a **stakeholder category**[11].*	a) Read access to all committee documents b) - c) -
Liaison representative	ISO/CS	An individual representing a liaison between two committees. ⚠️ *A liaison representative in a WG or JWG must be registered with a **stakeholder category**[11].*	a) Read access to all committee documents b) - c) -
Project leader	ISO/CS	Individual with the responsibility for the development of a certain standardization project	a) - b) - c) -

[11] Following TMB Resolution 89/2011, each expert (from either an ISO member body or a liaison organization) on an ISO working group or similar body should indicate the stakeholder category that most closely reflects his or her background. More information on stakeholders' category is given in Annex 2 at the end of the user guide.

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) access to committee documents b) access to the balloting application c) others
Maintenance agency representative	ISO/CS	Individual who represents a Maintenance agency.	a) - b) - c) -
Registration authority representative	ISO/CS	Individual who represents a Registration authority.	a) - b) - c) -
Document Monitor **Centralized** document Monitor	User Administrators	Person entitled to monitor document activity on a committee for National dissemination purpose. This role should be reserved to NSB staff members. **Document monitors are not participating to committee's work.** **Note 1:** centralized roles only apply to committees and sub-committees. **Note 2:** document monitors registered at a TC (or SC) level can only access the specific documents of the TC (or SC). He won't be granted access to WG documents. **Note 3:** a document monitor can be assigned to a WG however he must be registered as NSB staff and should be limited to 2 people per NSB according to TMB resolution 69/2009.	a) Read access to all committee documents b) - c) -

9.1.3 Person roles in National committees

Note that permissions resulting of the national roles below are not detailed here, as the permissions to ISOlutions applications may differ between National Standard bodies.

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

9.2 Balloting Roles

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) **access to committee documents** b) **access to the balloting application**
CIB Voter **Centralized** CIB Voter	User Administrators or ISO/CS (for closed groups)	An individual representing an organization (a member body), who is authorized and has an obligation to vote on ballots submitted to the P-members in a committee (such as New Work Item, Proposals, Committee Drafts etc.). There may be more than one individual with this role in a particular committee. For individuals from O-members in a committee, comments can be cast on the ballots.	a) Read access to all committee documents b) Can vote on CIB ballots of a particular committee (on behalf of a Member)
DIS Voter **Centralized** DIS Voter	User Administrators or ISO/CS (for closed groups)	An individual representing an organization (a member body), who is authorized to vote (member bodies with status of P-, O- or non-member in a committee) on a Draft International Standard (DIS). A voter may have an obligation to vote or not. There may be more than one individual with this role.	a) Read access to all committee documents b) Can see open DIS ballots, cast a vote (with or without comments) and see results of closed DIS ballots Note: a *centralized* DIS voter can access all DIS ballots. A *decentralized* voter can only access the ones for the committees he/she has been assigned
FDIS Voter **Centralized** FDIS Voter	User Administrators or ISO/CS (for closed groups)	An individual representing an organization (a member body), who is authorized to vote (member bodies with status of P-, O- or non-member in a committee) on a Final Draft International Standard (FDIS). A voter may have an obligation to vote or not. There may be more than one individual with this role.	a) Read access to all committee documents b) Can see open FDIS ballots, cast a vote (with or without comments) and see results of closed DIS ballots Note: a *centralized* FDIS voter can access all FDIS ballots. A *decentralized* voter can only access the ones for the committees he/she has been assigned

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) **access to committee documents** b) **access to the balloting application**
SR Voter **Centralized** SR Voter	User Administrators or ISO/CS (for closed groups)	An individual representing an organization (a member body), who is authorized to vote (member bodies with status of P-, O- or non-member in a committee) on a Systematic Review (SR). A voter may have an obligation to vote or not. There may be more than one individual with this role.	a) Read access to all committee documents b) Can see open SR ballots, cast a vote (with or without comments) and see results of closed SR ballots Note: a *centralized* SR voter can access all SR ballots. A *decentralized* voter can only access the ones for the committees he/she has been assigned
Ballot monitor **Centralized** Ballot monitor	User Administrators or ISO/CS (for closed groups)	Person representing an organization who has read/viewer-access to all or a subset of the ballots relevant for its organization (i.e. for which the organization holds P- or O-member status in originating committee) without having the permission to cast, modify or delete a vote/comment him/herself	a) Read access to all committee documents b) Can see all open ballots (CIB, DIS, FDIS, SR) and view the votes cast by his/her organization, but cannot cast a vote or submit a comment him/herself.

9.3 Roles in ISO/CS

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) access to committee documents b) access to the balloting application c) others
Technical editor	ISO/CS	Person in ISO Central Secretariat who is responsible for the editorial preparation/finalization of the version of a standard.	a) - b) - c) -
Proof reader	ISO/CS	Person in ISO Central Secretariat who is responsible for the editorial preparation/finalization of the version of a standard.	a) - b) - c) -
Technical programme manager (TPM)	ISO/CS	Individual who monitors the development of standards and provides management and procedural support to committees (can be a member of ISO/CS, IEC, or CCMC)	a) All permissions on committee documents b) Can see all committee's ballots (CIB, DIS, FDIS, SR) and view the votes, but cannot cast a vote or submit any comment c) Access to the PDF files of standards for the committee via the STADIST newsletter
Technical programme manager assistant	ISO/CS	Assistant(s) or support staff of the TPM	Same as TPM

9.4 Other Roles

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) **Access to committee documents** b) **access to the balloting application**¨ c) **others**
Employee of Organization	User Administrators or ISO/CS	Organization where the registered person works. A Function and an alternate title can be added. Included functions are: • CEO • CEO Assistant • Head of International Relations • Head of Standards Development Policy • Head of Marketing • Head of Communication • Head of Training and Development • Head of IT Policy • CASCO Contact • COPOLCO Contact • ISO Financial Matters Contact • Legal Adviser • Marketing data officer	a) - b) - c) -
Technical Manager	User Administrators	Individual in a member body in the function of a technical director, director of standards department, international department or similar and any assistants. ⚠️ *A technical manager must be first registered as Employee of the NSB.*	a) - b) - c) Access to the report called "Project status per member body" in ISO Project Portal
Principal Officer	ISO/CS	Official roles in ISOCS. It includes • President-elect • Vice-President (technical management)	a) - b) - c) -

Roles in the GD	Administered by	Role definitions	Permissions resulting from the role: a) **Access to committee documents** b) **access to the balloting application¨** c) **others**
		• President • Immediate Past President • Treasurer • Vice-President (Policy) • Secretary-General	
Translator	User Administrators	Individual with the right to submit translations of texts to ISO/CS (through the submission interface)	a) - b) - c) Can submit files with translations of documents to ISO/CS (via the submission interface)
Project submitter	ISO/CS	Individual who has can submit documents on a particular project(s) through Submission Interface	a) - b) - c) Can submit documents for a particular project to ISO/CS (via the ISO Submission Interface)
User Administrator	User Administrators or ISO/CS	Individuals who are responsible for the management of National representatives, experts, organization, committees and their roles. ⚠ *A User administrator must be first registered as Employee of the NSB.*	a) - b) - c) -

10 Annex 2 – Stakeholders' categories

Not applicable at CEN for the moment.

Each expert (from either an ISO member body or a liaison organization) on an ISO WG or similar body (i.e. any team of individual experts nominated to participate in the drafting of a new deliverable or the revision of an existing one) should indicate the stakeholder category that most closely reflects his or her background.

A scheme for the categorization is set out in the table below and will be reflected in individual entries in the ISO Global Directory. It is designed to assist:

- those developing proposals for new ISO work as they attempt to identify the range of relevant stakeholders to be engaged;
- ISO member bodies in conducting outreach to identify and engage the relevant national stakeholders in ISO work; and
- individual experts in identifying their stakeholder category.

Usually the categorization will reflect the role in which the individual expert also sits on a national mirror committee and in most cases will be determined by the nature of the individual's employment. However, this is not always a reliable indicator, particularly for categories C, D and G.

Those who are employed as consultants should identify the category that most closely matches the origin of the expertise and the type of perspective that they bring to the project.

Representatives of standards developing organizations, bodies that accredit standards developing organizations, or national standards bodies are not regarded as being in a stakeholder category although they may participate in ISO technical bodies. Their participation is generally related to providing administrative and procedural support or to act as an information conduit between their organization, its stakeholders and the ISO committees. It is not regarded as being in the same capacity as other stakeholders who provide technical expertise on the subject matter of draft ISO standards.

Please note that not all ISO committees, subjects or specific projects will engage the same sets of relevant stakeholder categories. Proposers of new work, ISO committees and ISO member bodies are free to choose the categories which they consider to be most appropriate.

Category	Title	Typically including:
A	Industry and commerce	manufacturers; producers; designers; service industries; distribution, warehousing and transport undertakings; retailers; insurers; banks and financial institutions; business and trade associations
B	Government	international and regional treaty organizations and agencies; national government and local government departments and agencies, and all bodies that have a legally recognised regulatory function
C	Consumers	national, regional and international consumer representation bodies, independent of any organization that would fall into the 'industry and commerce' category, or individual experts engaged from a consumer perspective
D	Labour	international, regional, national and local trades unions and federations of trades unions and similar bodies the main purpose of which is to promote or safeguard the collective interests of employees in respect of their relationship with their employers This does not include professional associations [1].

Category	Title	Typically including:
E	Academic and research bodies	universities and other higher educational bodies or professional educators associated with them; professional associations [1]; research institutions
F	Standards application	testing, certification and accreditation bodies; organizations primarily devoted to promoting or assessing the use of standards [2]
G	Non-governmental organization (NGO)	organizations that usually operate on a charitable, not-for-profit or non-profit distributing basis and that have a public interest objective related to social or environmental concerns. This category does not include political parties or other bodies whose main purpose is to achieve representation in government or governmental bodies.

Notes

[1] Professional associations are regarded as:

- associations of individuals practicing, or being closely associated with the practice of, specific professional skills or sets of closely related skills; and
- having a purpose, at least in part, to advance the development of those skills and the understanding of the arts, sciences and technologies to which they relate.

[2] 'Accreditation' refers to the accreditation of testing and certification bodies.

Figure 78 - Categories for the classification of experts nominated to working groups

In the Global Directory, when assigning a new expert to a working group, you are asked to indicate the stakeholder category (mandatory metadata).

To see what each category include in the application, browse through the different categories and refer to the text displayed right below as shown in the figure below:

Figure 79 – Stakeholder categories in the Global Directory

11 Helpdesk information

For further questions and assistance on the Global Directory and other ISO IT applications, please contact the ISO helpdesk helpdesk@iso.org.

For assistance with meeting setup, meeting updates, registration of users to ISO official roles (e.g. Secretary, Convenor, chairperson...), NSB Membership (O- and P-Membership) to Committees and Committee/ WG status changes please contact the ISO STAND Administrator at tcsupport@iso.org.

You will find the user guides for all ISO applications under http://www.iso.org/e-guides

More information about the Global Directory and other ISO applications can be found at: www.iso.org/eservices.

*Refer to the **CEN supplement** section for the support to the CEN Members and CEN IT applications.*