Topic: **AIF Support Series #13: *ISO Documents Platform***

Date: **March 16, 2021**

Presenters: **Rachel Hawthorne (ANSI Staff) and Edward Terhune (ANSI Staff)**

1. Opening of the meeting

- A presentation (see AIF N428-2021) was given on the new ISO Documents Platform. The presentation provides an overview of the website, focusing on how to navigate the new structure, accessing documents and the integration with the other ISO platforms.
- We want to hear from you to learn how we can best support you throughout your U.S. TAG and committee work. Submit any inquiries or comments to ANSI's ISO Team (isot@ansi.org).

2. Key points from the presentation

- The ISO Documents platform can be reached through the ISO Portal (https://log.iso.org/portal) by logging in and clicking on "Documents" or through notification email from the Committee/Working Group.
- Your Dashboard will show all groups that you are able to access, and you can mark particular groups as "Favorites" for easier access.
- You can find links to general information about ISO Committees, the membership list for a group and the overall structure of related groups on the group's Documents page.
- There are improved sorting, filtering and search functions – the search function will find text within posted PDFs.
- The "Meeting Documents" section shows upcoming meetings, documents filtered for specific meetings and contains links to the ISO Meetings Platform.
    - A brief presentation entitled "How To Register for an ISO WG Meeting" can be found on ISOT's SharePoint site (share.ansi.org/isot) in the "ISOT Meeting Resources" folder.
- The "Ballot Documents" section show upcoming ballots, documents filtered for specific ballots and contains links to the ISO Ballots Platform.
    - A brief presentation entitled " How To Vote on an ISO WG Ballot" can be found on ISOT's SharePoint site (share.ansi.org/isot) in the "ISOT Voting Resources" folder.
- Posted documents can now be linked to other areas of the ISO site, such as particular projects, meetings or ballots, through their improved metadata.
- ANSI shares feedback with ISO on the site regularly, so please share any comments or feedback you have with us (isot@ansi.org).

Session Questions and Answers

1. **Can WG documents be linked to ballots or meetings of the parent committee?**

   Answer: No, not at present. WG documents can only be linked to WG meetings, WG ballots or projects assigned to the WG. It would be up to WG Convenors to post any relevant information to the WG, and for U.S. TAG Administrators to share TC/SC level documentation to the TAG's membership.

2. **Is there a way to "select all" documents in a folder for download?**

   Answer: No, not at present. When following a "zip and download" link from a notification email, or when visiting a folder of documents, one must manually select any documents to be added to a zip file. We can suggest improvements to this function to ISO.

3. **Can you move documents from one folder to another after they've been notified?**

   Answer: No, it is not possible, so it is important to ensure that documents are posted in the proper folder before sending the document notification to the group's members.

4. **Can the Help beacon or Survey pop-up up be disabled when visiting the ISO site?**

   Answer: Not that we are aware of, but we can ask ISO if it will be possible in the future.

5. **What is the difference between the "Member List" and the "Full Member List"?**

   Answer: The "Member List" has all individuals with a direct role in the committee and is visible to all members of the group. The "Full Member List" has all individuals who have access to the committee documents whether they have a direct role in the committee or not. For example, the committee managers of the parent technical committee or related working groups are listed in the full member list, which is only visible to committee officers.

6. **When should we go to the ISO Helpdesk or ISOT for assistance?**

   Answer: Purely technical issues with the ISO site can be directed to the ISO Helpdesk (helpdesk@iso.org). Procedural and other issues can be directed to ANSI's ISO Team (isot@ansi.org). ISOT is happy to be your first contact in either case, and can refer you to ISO as appropriate.

AIF SUPPORT SERIES

New ISO Documents Platform

March 16, 2021

Housekeeping items

- All participants will be muted until the end of the presentation
- Use the Q&A function to “All Panelists” / Raise Your Hand to ask questions
- If we don’t get to your question today, reach out via email isot@ansi.org
- Follow-up/repeat sessions will be held if necessary
- Slides and one-page summary to be circulated after the call
- Keep us informed of your experiences!

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ISO Documents Platform – Session Overview

- Navigation
- Structure
- New functions
- Links to other ISO applications
- Guidance and additional resources for committee managers, WG convenors and WG secretaries

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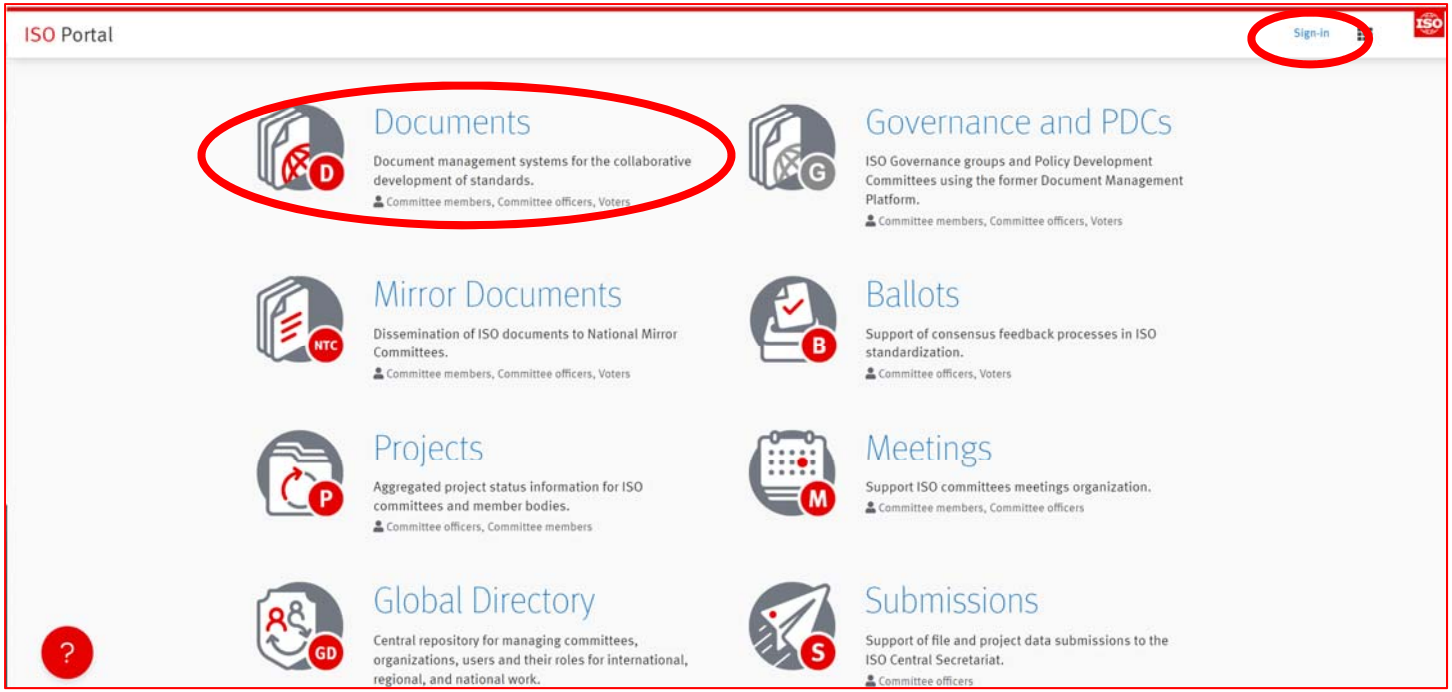
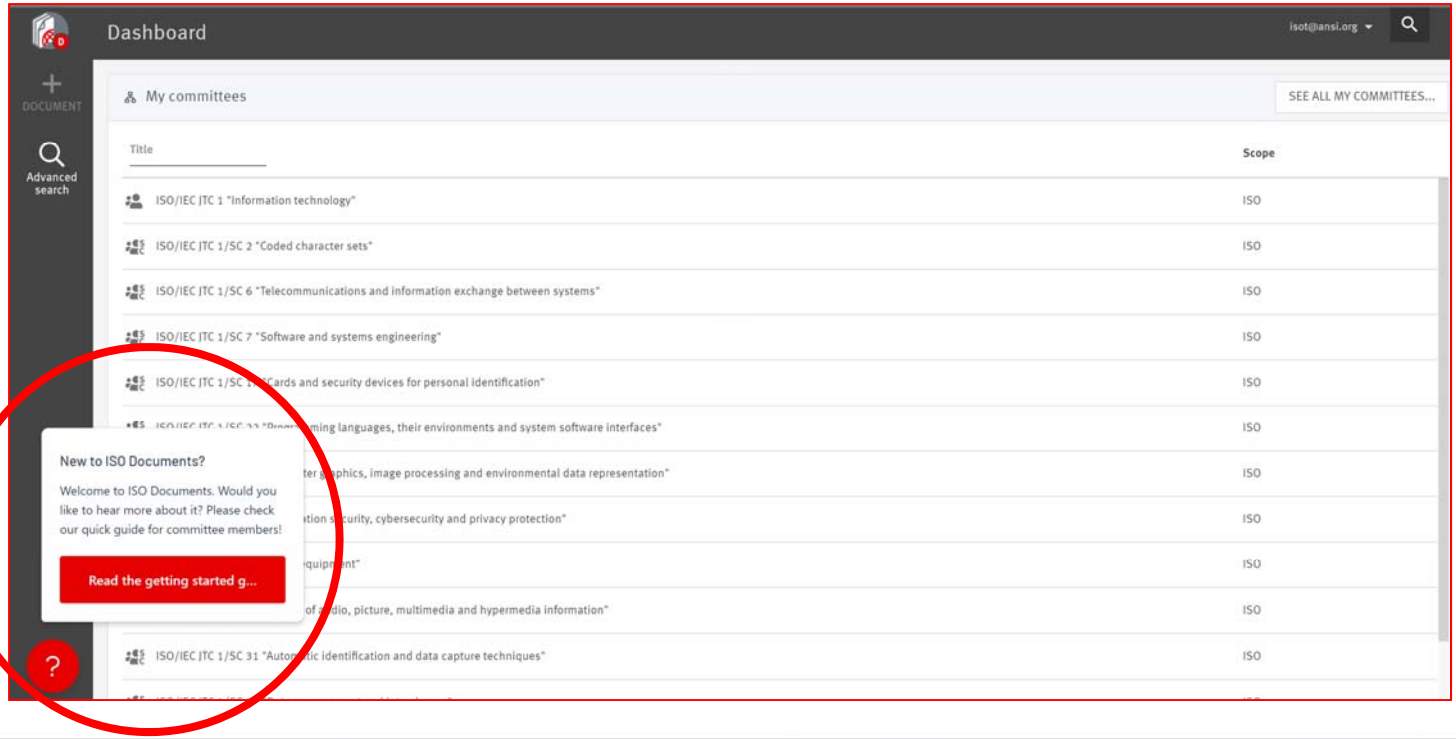
ISO Documents Platform – Navigation

- Accessed through https://login.iso.org/portal/
- Sign in in the upper-right hand corner
- Click on “Documents”



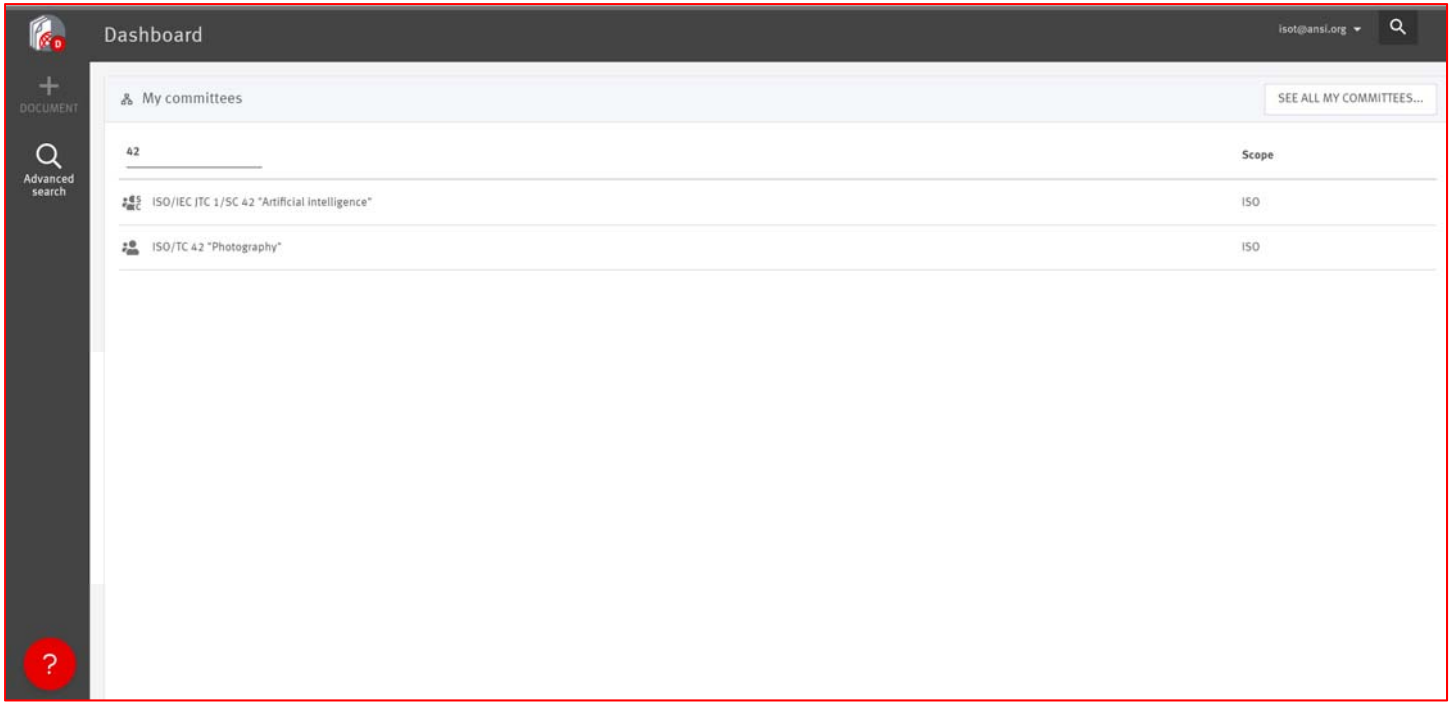
ISO Documents Platform – Getting Help

- A Help beacon will appear on every page - ?
- Getting Started guides are linked when you log in
- helpdesk@iso.org and isot@ansi.org



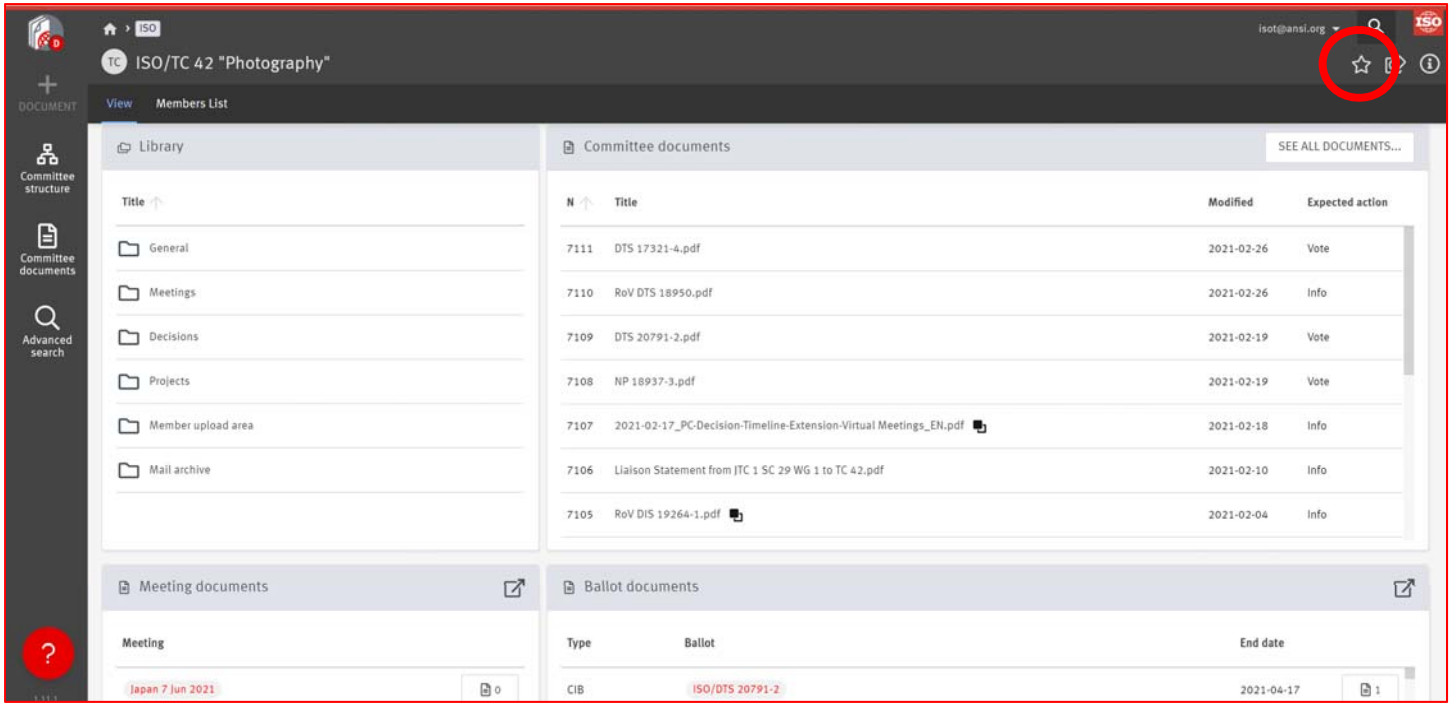
ISO Documents Platform – Your Committees

- All committees that you have access to will appear here
- Start typing a number to filter the list



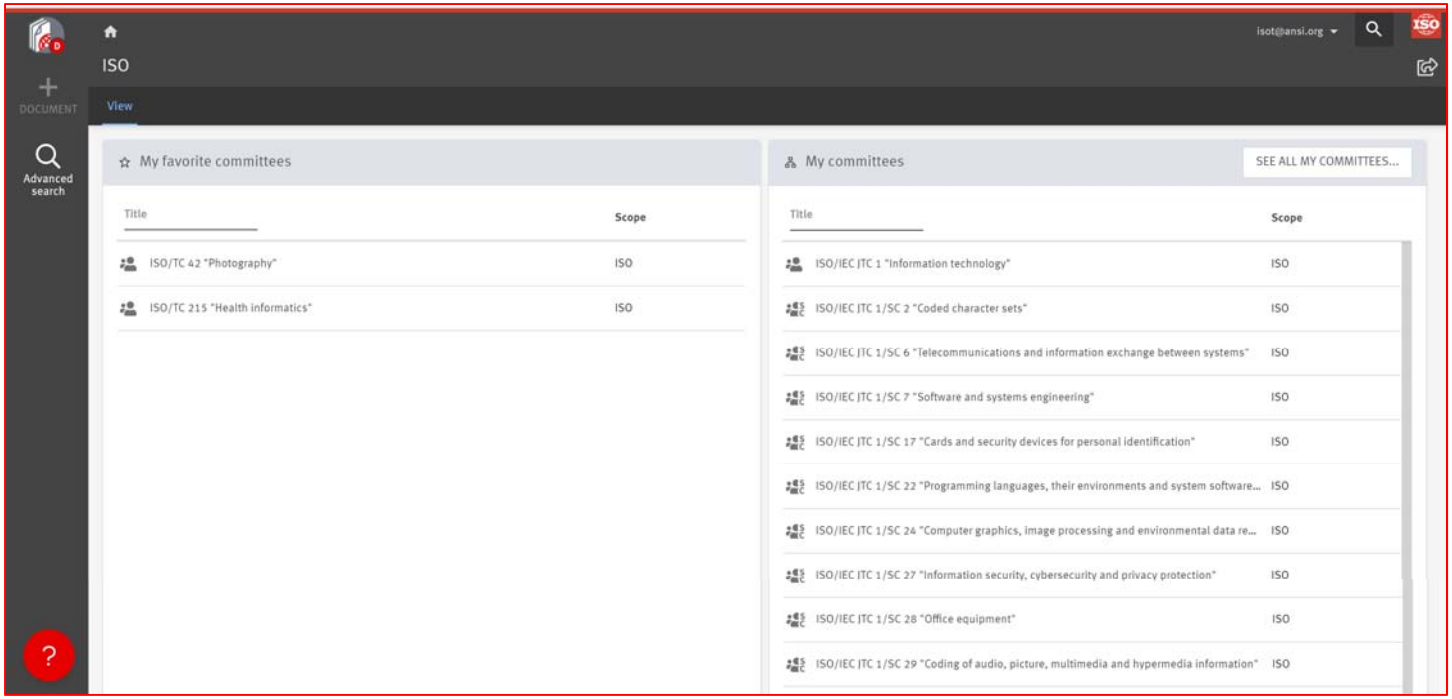
ISO Documents Platform – Favorites

- You can click the star on any committee page to mark it as a favorite.



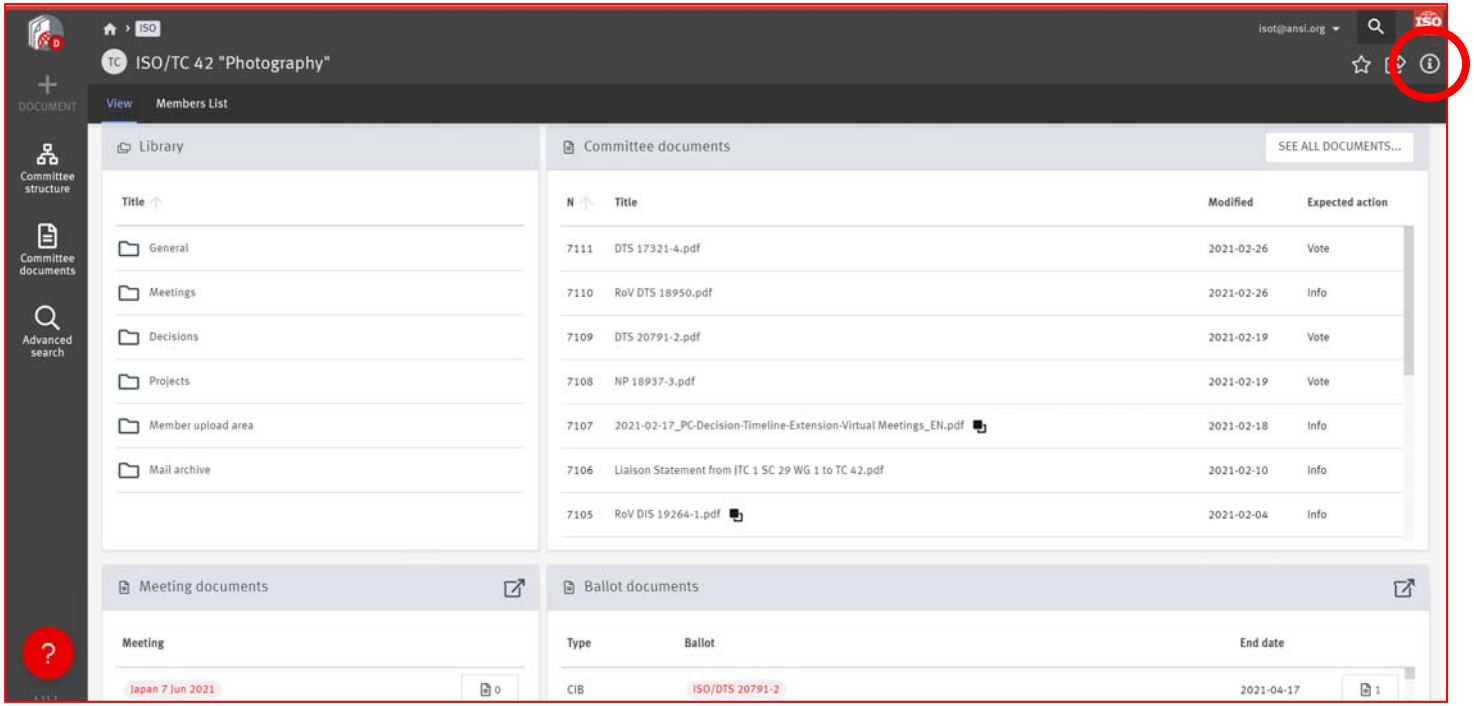
ISO Documents Platform – Favorites

- Once you add a favorite, you will have two lists – favorites and all committees you have access to.



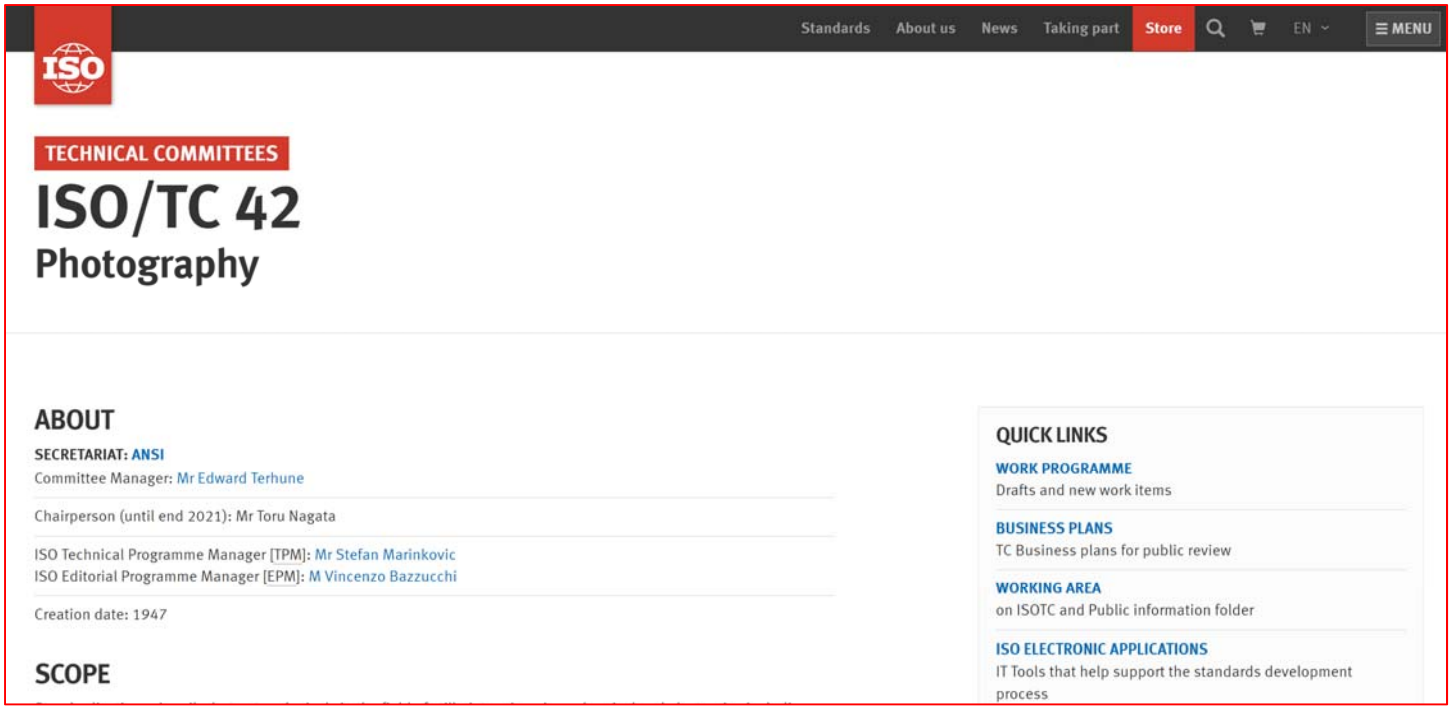
ISO Documents Platform – General Info

- For TCs and SCs, you can click the info button to be taken to the ISO page about that committee.



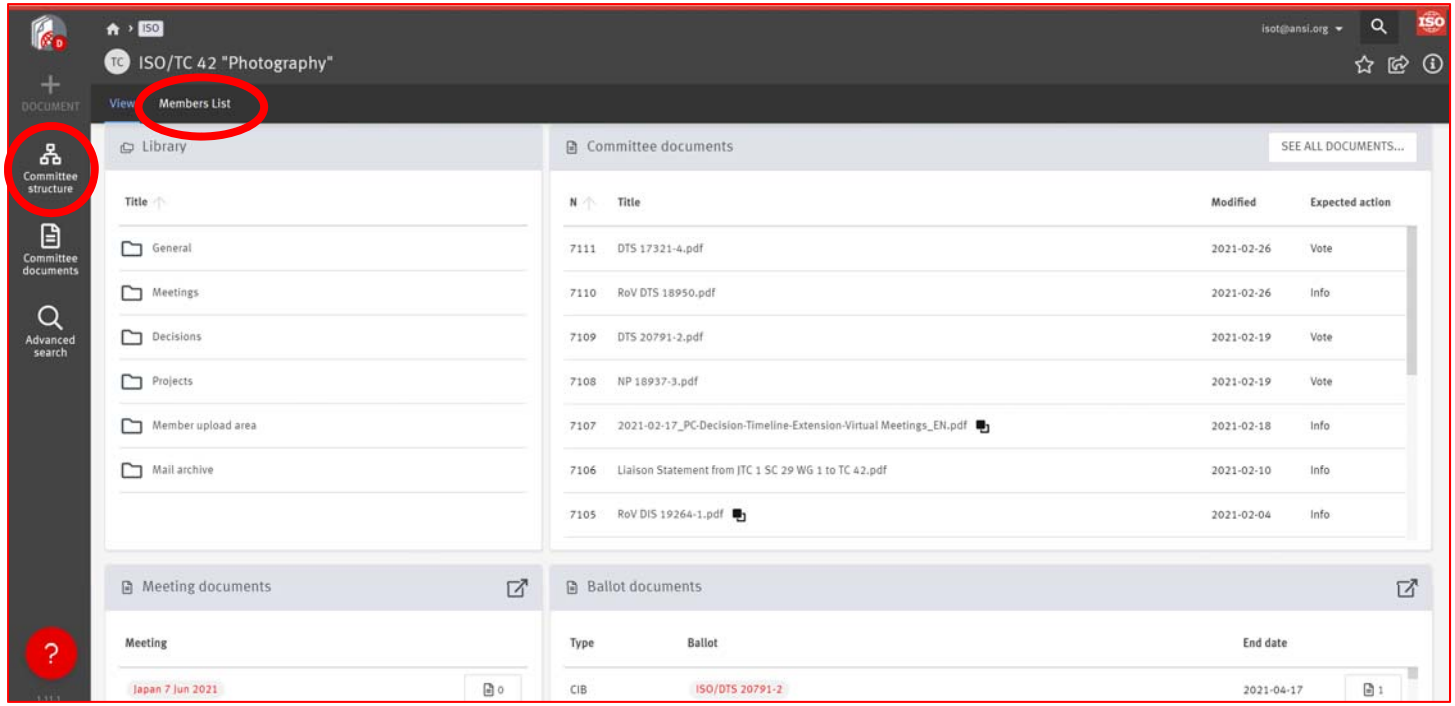
ISO Website – General Info

- Includes general information about the committee including officers and all approved liaisons.
- Links to the work program and the business plan.



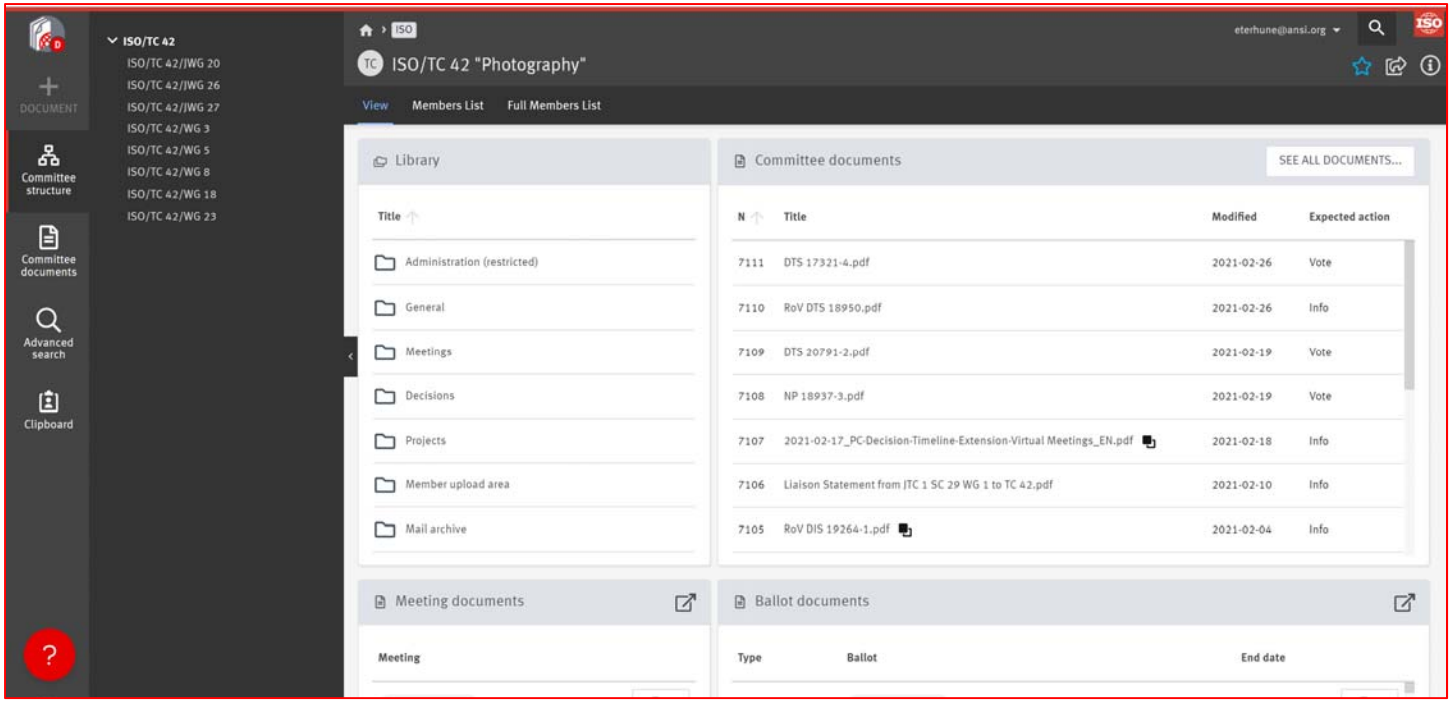
ISO Documents Platform – Structure

- You can view the Members List and the Committee Structure by clicking the links shown.



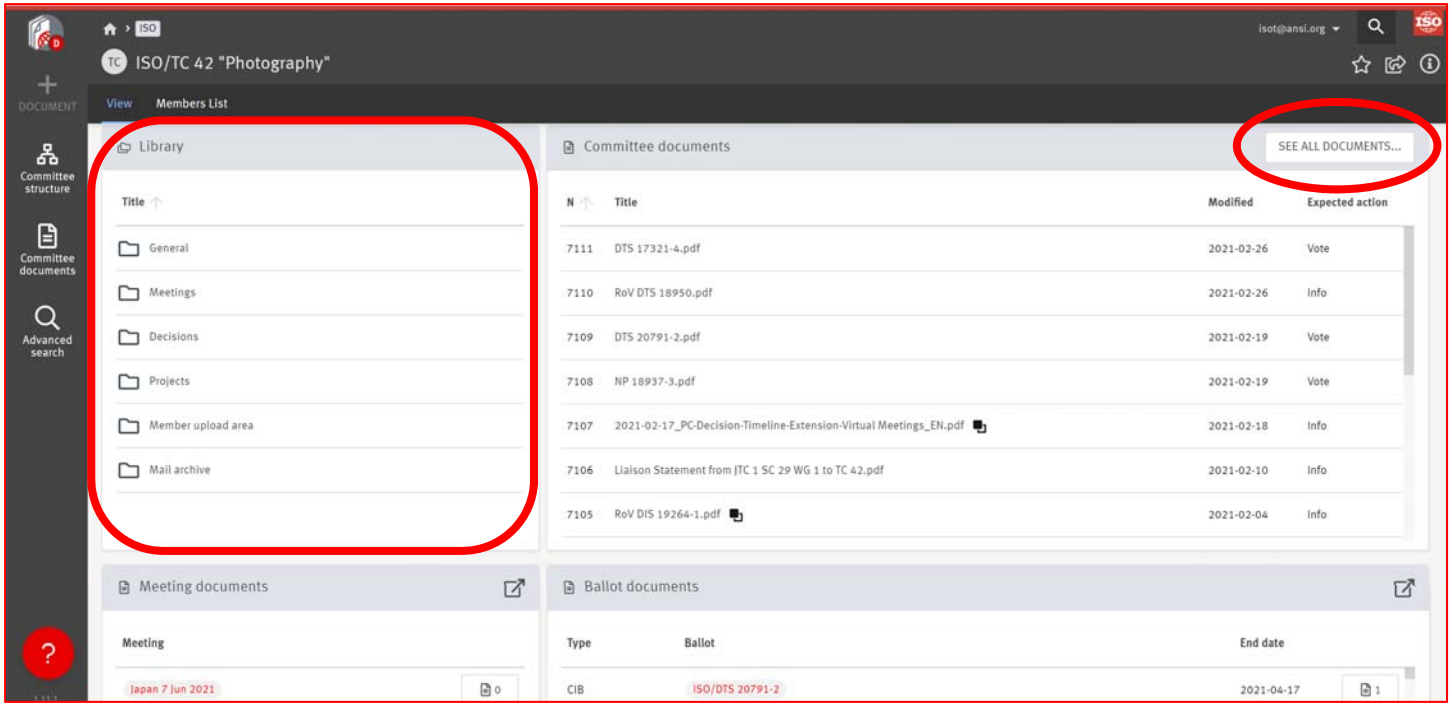
ISO Documents Platform – Structure

- Clicking on the Committee Structure will show all SCs and WGs – you will be able to click to go to the landing page of those that you have access to.



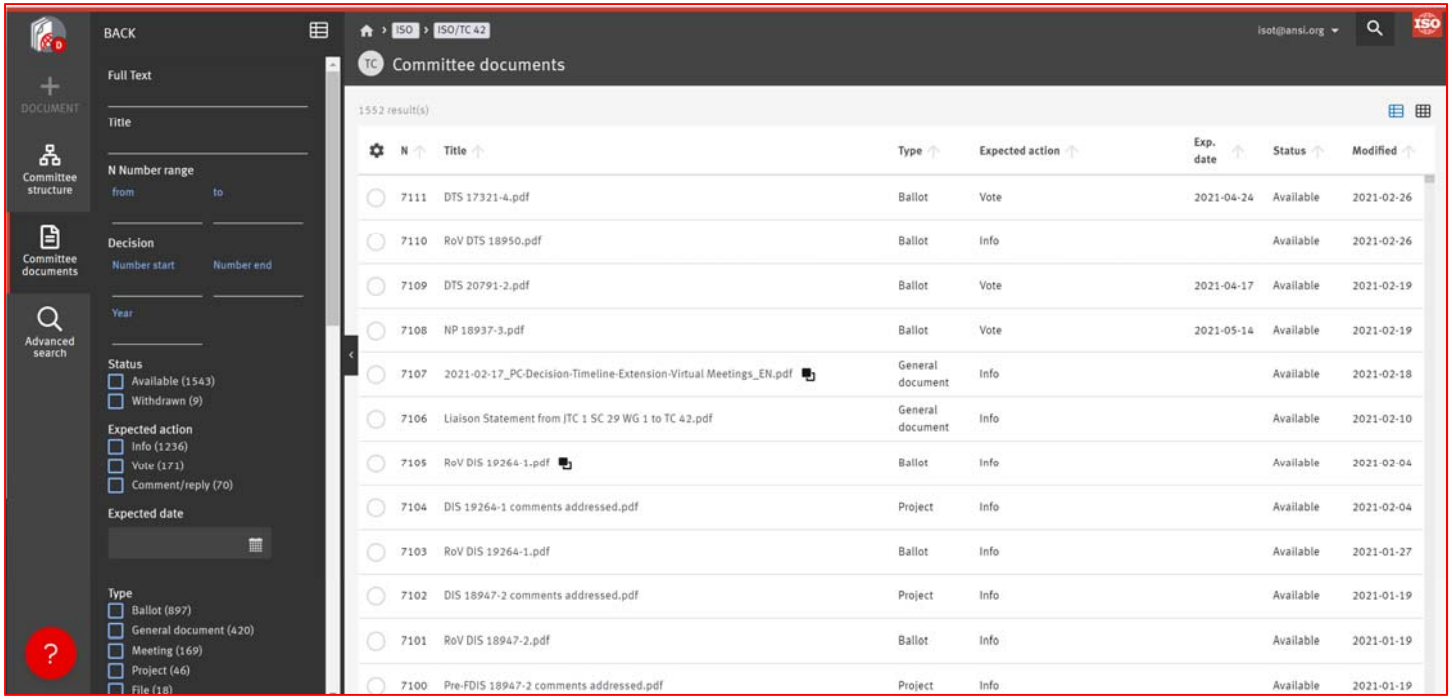
ISO Documents Platform – Document Access

- You can look for documents related to particular meetings or projects in the “Library” folders, or
- View the list of all documents for the committee…



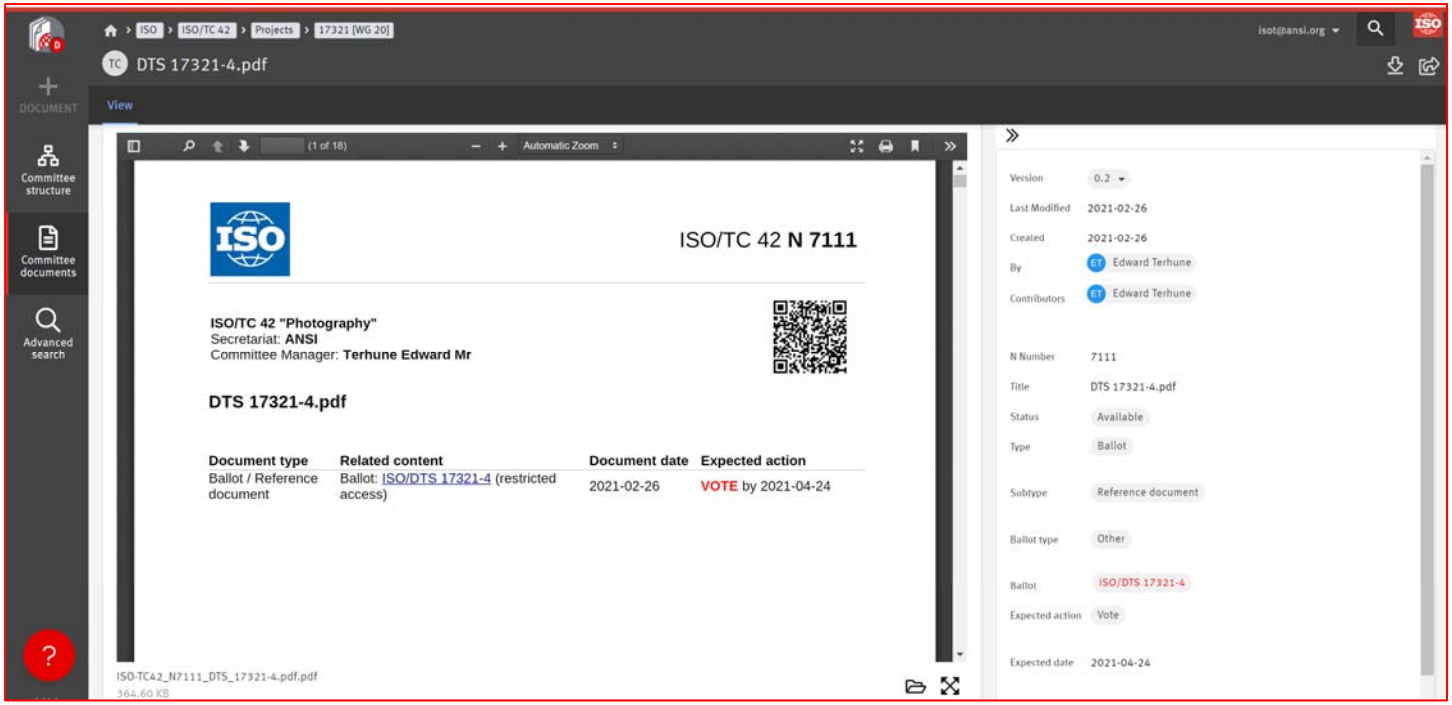
ISO Documents Platform – Document Access

- When viewing all documents, there are improved sorting, filtering and search functions.
- You can ‘check’ multiple documents to zip and download.



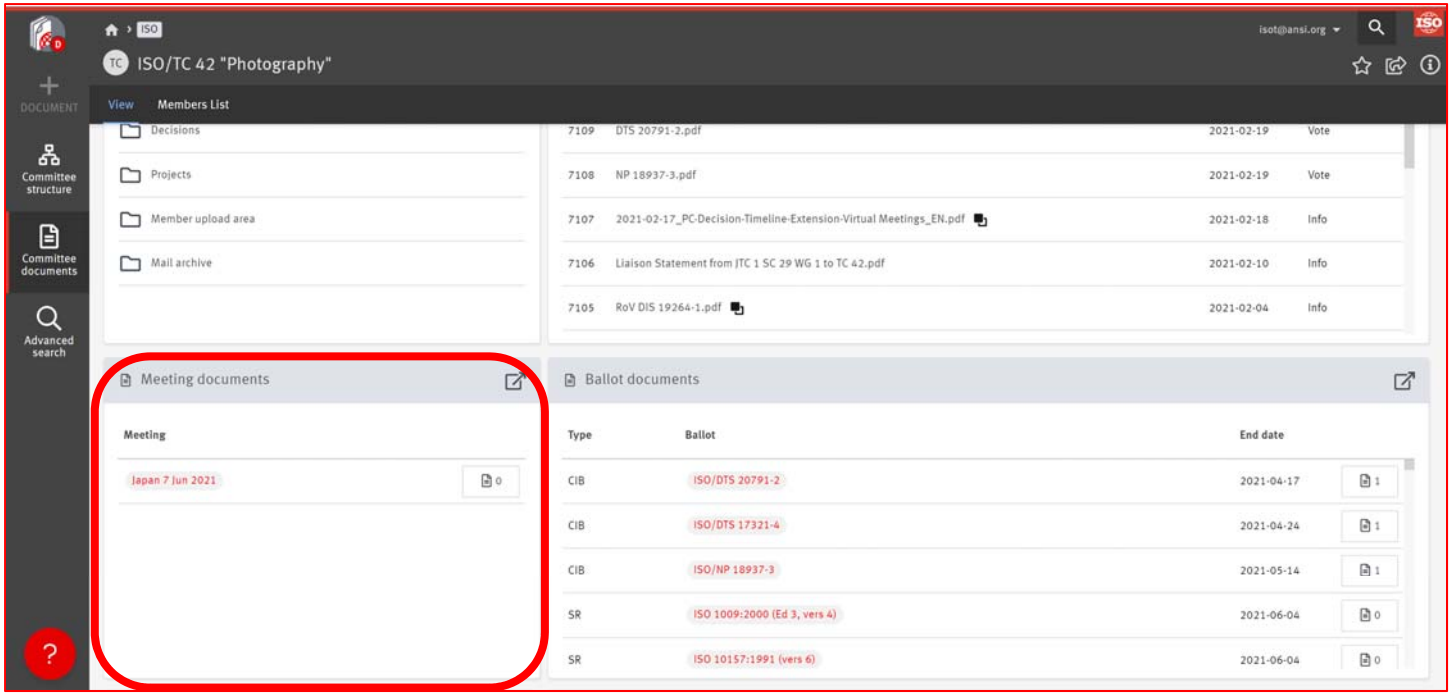
ISO Documents Platform – Document Access

- You can view metadata on a particular document.
- You can preview the entire document in your browser.
- You can download it and forward a link to it.



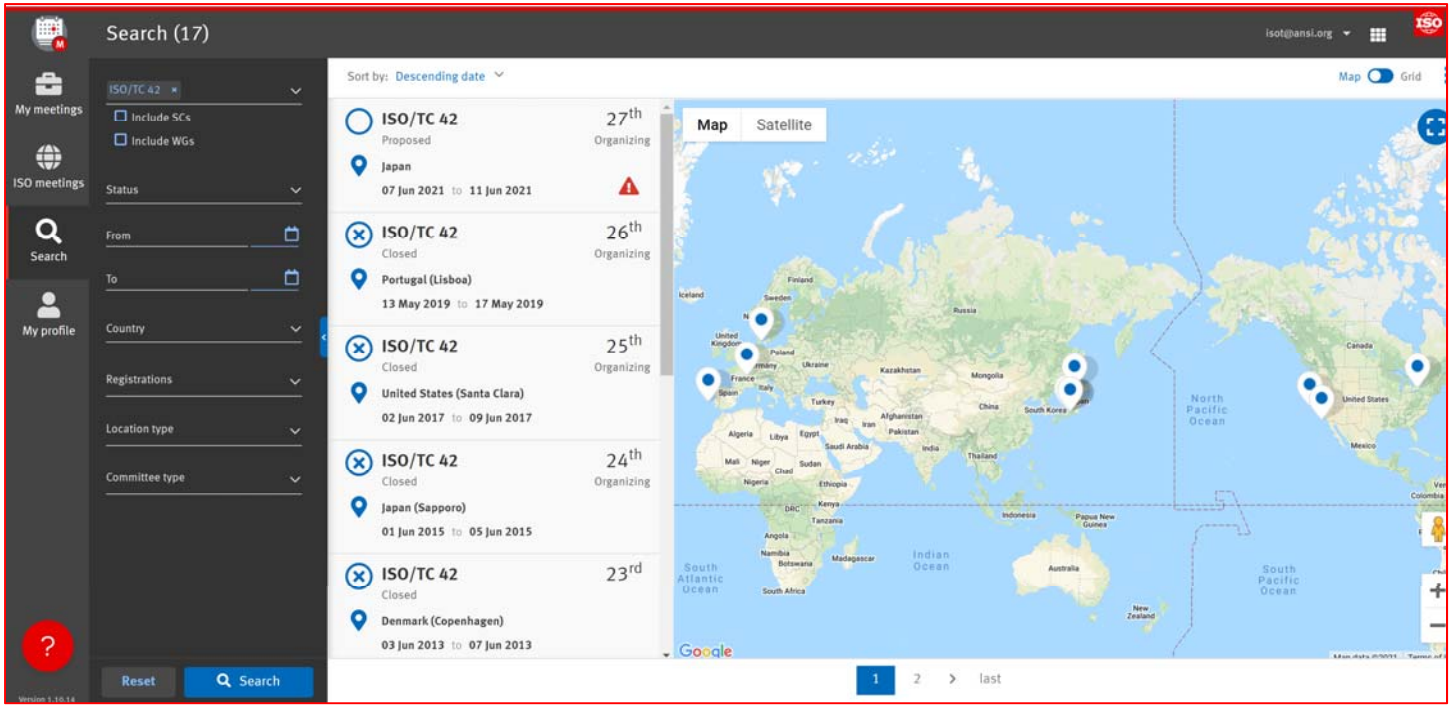
ISO Documents Platform – Meetings Link

- This section shows all upcoming meetings.
- You can click on to go to the ISO Meetings Platform.
- You can click on a particular meeting to go to that listing.



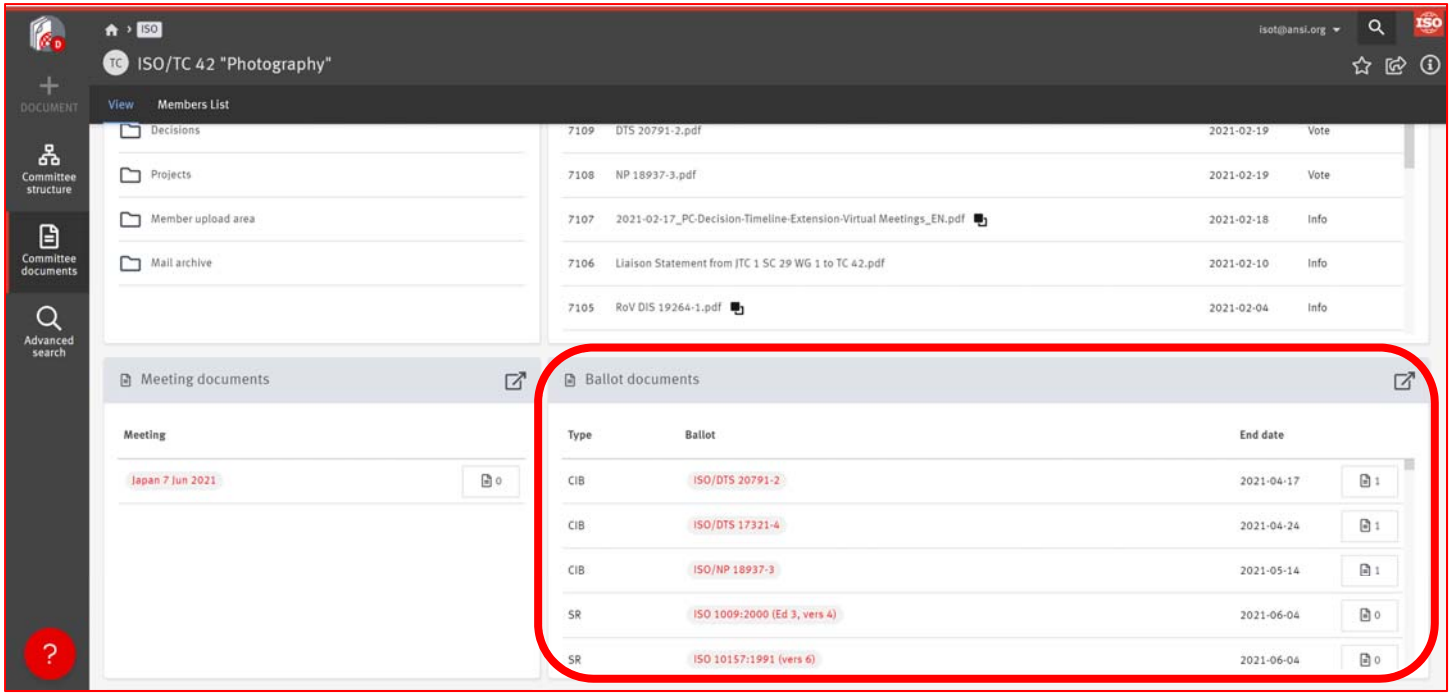
ISO Meetings Platform

- Experts registered to a WG must register themselves for any WG meetings.
- Delegates attending a TC/SC meeting must be registered by ISOT at the request of the U.S. TAG Leadership.



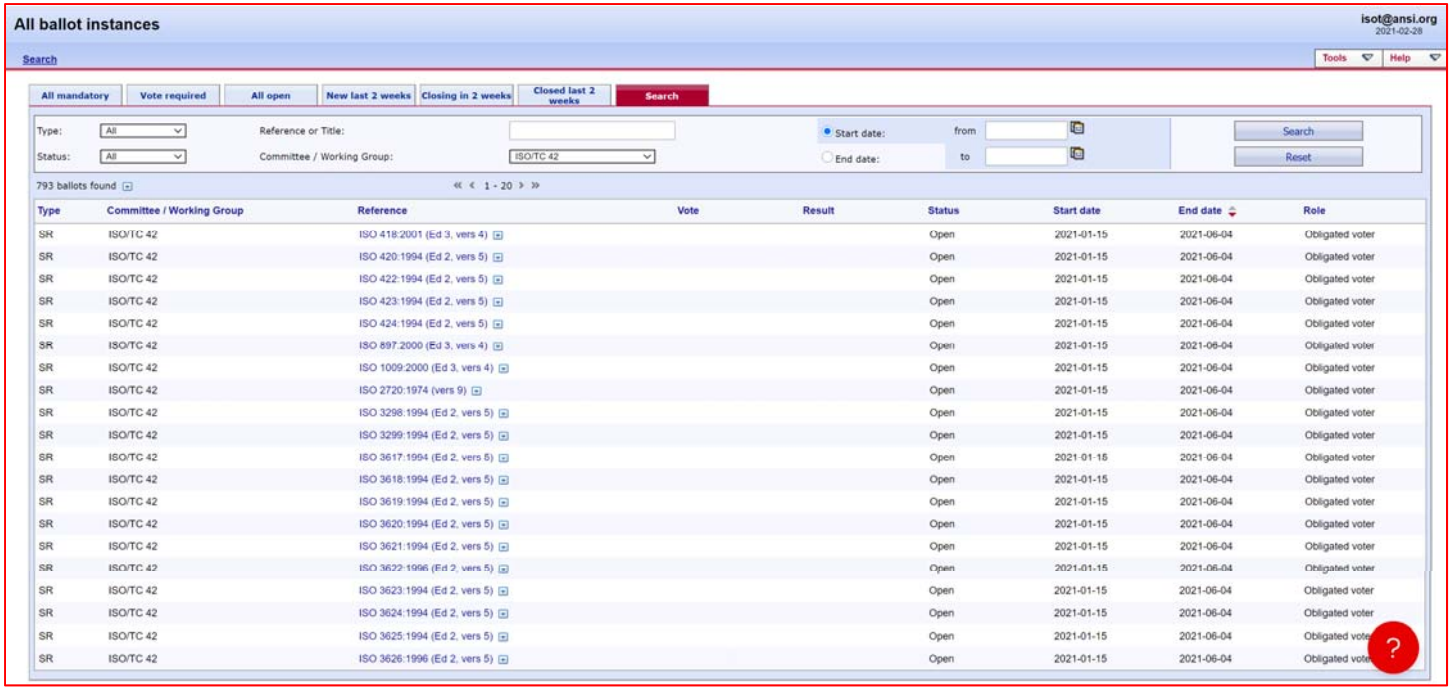
ISO Documents Platform – Ballots Link

- This section shows all open ballots.
- You can click on to go to the ISO Ballots Platform.
- You can click on a particular ballot to go to that ballot.



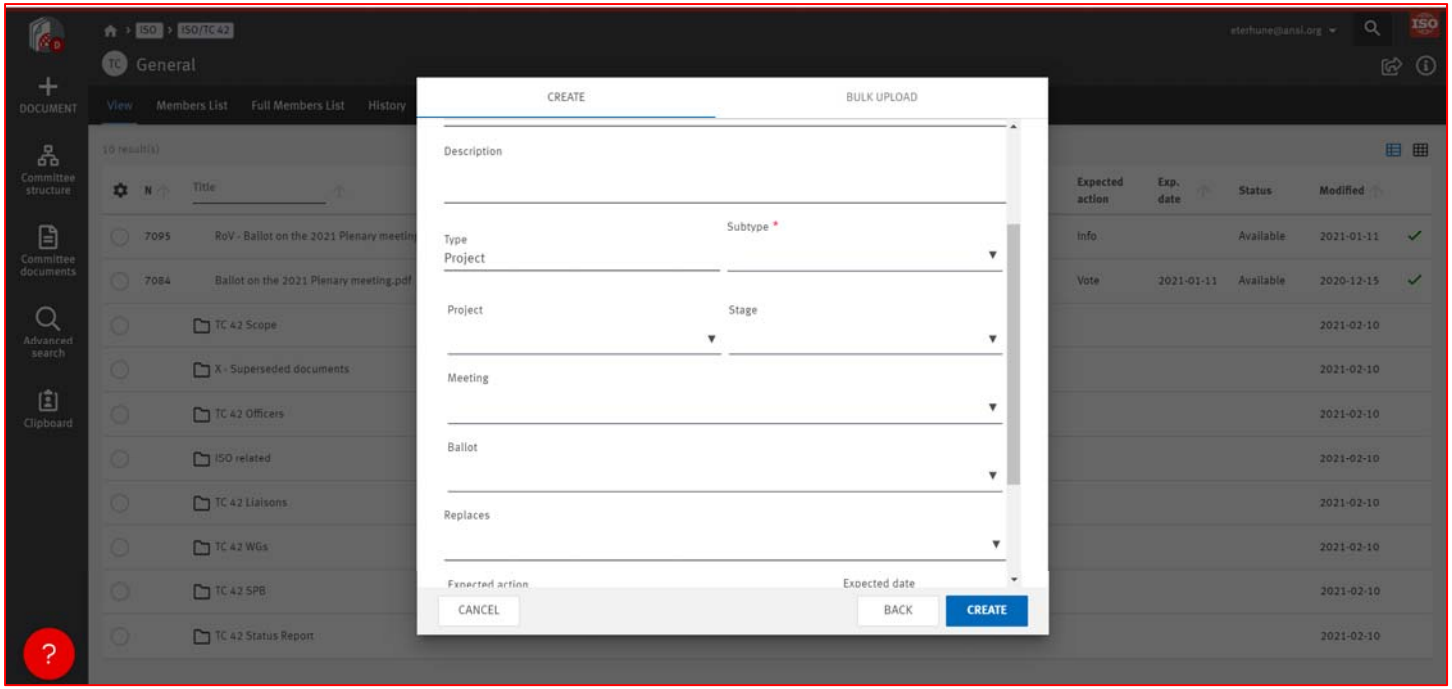
ISO Ballots Platform

- Experts registered to a WG must register their own votes for any WG Expert Consultation ballots.
- National votes on any TC/SC ballots must be registered by ISOT at the request of the U.S. TAG Leadership.



ISO Documents Platform – Adding Documents

- Committee Leaders can now drag and drop documents and upload documents in bulk.
- Documents can be linked to particular projects, ballots and meetings.



Guidance for CMs and WG officers

- https://www.iso.org/iso-documents-GG-0A1B2C-2 - this is the page that has the training and support for the ISO DOCS system that you will use most often.
- https://helpdesk-docs.iso.org/ - this has general training for all the ISO applications

Additional Resources

- ISO Directives: www.iso.org/directives
- ANSI Online Training Courses: https://www.ansi.org/education/activities/standards-training-courses-webinars
  - Roles and Responsibilities
  - Leadership Strategies and Skills
- My ISO Job: http://www.iso.org/iso/my_iso_job.pdf

Q&A

For More Information

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