#### AIF Support Series - WebEx Session Output

Topic: AIF Support Series #6:

ISO Services for ISO WGs

Date: May 1, 2020

Presenters: Seitz and Edward Terhune, assisted by Kemi Allston

#### 1. Opening of the meeting

ANSI Staff provided a presentation on IT Services for ISO Working Groups. The information provided in the
presentation (see AIF N365-2020) highlighted several of the IT services that are provided to support effective
collaboration in ISO working groups. We want to hear from you to learn how we can best support you
throughout your committee work. Submit any inquiries or comments to ANSI's ISO Team (isot@ansi.org).

#### 2. Key points from the presentation

#### **Registration to ISO WGs:**

• The process to have a U.S. expert registered to an ISO working group was reviewed, along with the rules that must be agreed to in order to participate in ISO work. It was noted that the registration must be done through the U.S. TAG, as no other parties can approve that registration. It was also stressed that only officially registered experts are allowed to participate in ISO working groups.

#### **Accessing documents in ISO WGs:**

 The process to access ISO WG documents, from signing into the ISO site, to downloading documents was outlined for all participants.

#### **Voting on ISO WG Consultation Ballots:**

The process to locate, review and vote on ISO Working Group Consultation Ballots was covered. As not all
groups currently use this feature, some of the advantages to using WG Consultation Ballots were discussed.

#### **Tips for using the ISO Commenting Template:**

 As commenting is a large part of the voting process, helpful hints on how to effectively use the ISO Commenting Template were shared.

#### **Registering for ISO WG Meetings:**

 The process to register for an ISO WG meeting was reviewed, stressing that only registered experts are allowed to attend an ISO WG meeting.

#### **Other Helpful Resources:**

Additional resources, such as ISO's Online Browsing Platform, which allow users to view informative information
in any ISO standard, and ISO's electronic applications user guides were highlighted.

#### 3. Session Questions and Answers

#### 1. What can you tell us about the new ISO Documents system to replace LiveLink?

**Answer:** Ten committees/working groups are currently a part of the pilot, which started in January. The new site will have a much improved search function, and documents will be better integrated with the other ISO systems.

#### 2. What is the current status/schedule for the system that is to replace LiveLink?

**Answer:** ISO will begin the progressive onboarding of all committees in September 2020. It is anticipated that all committees will be on the new system by the end of 2020.

#### AIF Support Series - WebEx Session Output

#### 3. What about the new system not having a Public Site functionality?

Answer: We are aware of this and will be asking ISO for more information on this subject.

#### 4. Is there a minimum length of time required for ISO WG consultations?

**Answer:** The ISO Directives do not mandate a length of time, so WG leadership should take into account the amount of time needed to consider the particular subject of the ballot, the schedules of the experts and the project's timeframes.

#### 5. Should the "MB/NC" column only contain the country code?

**Answer:** Yes, when submitted at the Committee level. At the WG level, there are not national consensus positions, so it is helpful if the experts include their initials, so the origin of the comments can more easily be determined.

#### 6. Can ISO Committee Chairs and ISO WG Convenors create meetings?

**Answer:** Yes, and the steps to do so can be found in the user guide.

#### 7. If one expert is registered to an online WG meeting, can they have other people in the room with them?

**Answer:** They should not. Only registered experts are allowed to attend ISO WG meetings. If this happens, it's best for the leadership to remind the attendees of the rules.

#### 8. How many reminders are sent to possible meeting attendees?

**Answer:** Possible attendees are notified when a meeting is created, confirmed, when registration is opened, and is then send an additional reminder about the meeting.

### 9. Are there any certain protocols that need to be followed in regards to notifying members of the WG and/or releasing an agenda with a TBD date?

**Answer:** Issuing an agenda with a TBD date is allowed. ISO has relaxed the notification timeframes for physical meetings once the embargo on meetings has been lifted. TCs, SCs and PCs must notify a physical meeting 12 weeks in advance.

#### 10. Does the ISO Meetings platform send out calendar invites when attendees register?

**Answer:** It does not, but we can provide this idea to ISO for consideration.

#### 11. Will the ISO Meetings platform allow meeting to be scheduled at particular times instead of full days?

**Answer:** At present, it does not, but this request has been made to ISO. In the meantime, the "notes" section of the platform and the agenda can be used to manage the schedule.

#### 12. Will the ISO Meetings platform allow members to indicate that they will not be attending the meeting?

**Answer:** At present, it does not, but this request has been made to ISO.

#### 13. Is ISO 7000 a standard that can be purchased or are all the symbols available on the OBP? Do you have to purchase a symbol if you wish to use it in standard?

**Answer:** Link to ISO 7000 graphical symbols: https://www.iso.org/obp/ui/#iso:pub:PUB400001:en. If there is a symbol that you wish to use in your standard, you can contact your TPM. You can purchase the symbols there as well for use on products.

#### Welcome!

- We will mute all lines. Please stay muted so everyone can hear each other and the presentation.
- If your sound quality is low, try using the call back feature.
- Please disable video.
- To ask a question, please use the chat feature (to all participants) or raise your hand. We will monitor both and answer questions after the presentation.
- We will send you the slides after the session.



# IT Services for ISO Working Groups

AIF Support Series # 6 May 1, 2020



- Agenda
  - Assignments to ISO WGs
  - Accessing documents in ISO WGs
  - Voting on ISO WG consultation ballots
  - Tips for using the ISO Commenting Template
  - Registering for ISO WG meetings
  - Other helpful resources

- Speakers
  - Edward Terhune, Senior Program Manager, ANSI's ISO Team
  - Sally Seitz, Senior Manager Standards Facilitation



- To be assigned to an ISO WG:
  - An expert must be a part of the related U.S. TAG
  - The U.S. TAG must approve the nomination of the expert to that ISO WG
  - The TAG leadership must inform ANSI's ISO Team of the assignment
  - ANSI's ISO Team must register the expert to the ISO WG in the ISO system

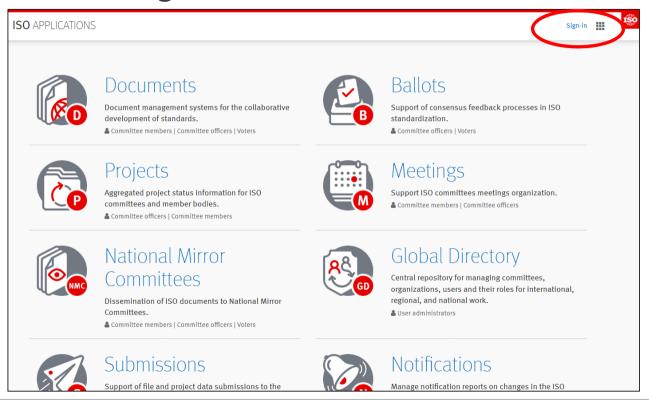


- Once assigned as a U.S. expert to an ISO WG:
  - The expert will receive an automated email from the ISO system
    - If it's their first assignment, the expert will need to activate their account
  - The expert must read and accept the declaration on copyright and data protection for participants in ISO activities upon signing in
  - The expert must abide by the ISO Code of Conduct

ISO's Code of Conduct: <a href="https://www.iso.org/publication/PUB100397.html">https://www.iso.org/publication/PUB100397.html</a>



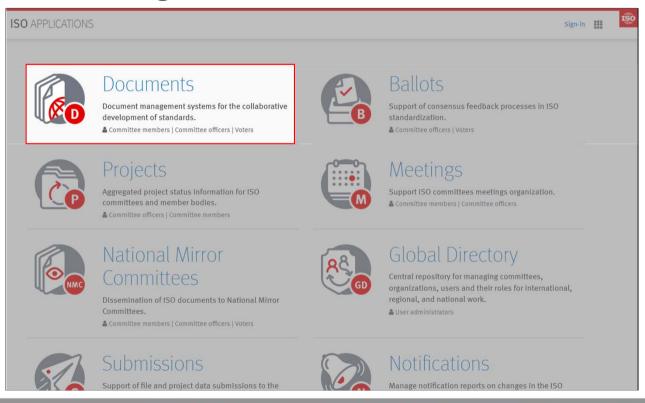
Accessing documents in ISO WGs



https://login.iso.org



Accessing documents in ISO WGs

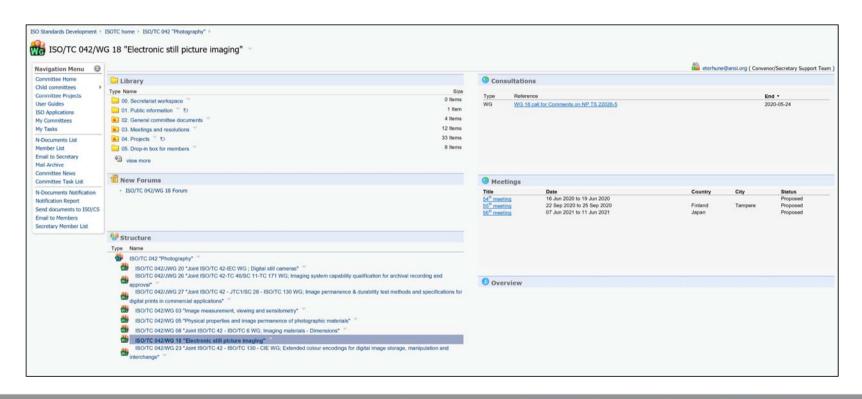


#### Click on:

- "Documents"
- "ISOTC Home"
- The parent TC
- Your WG

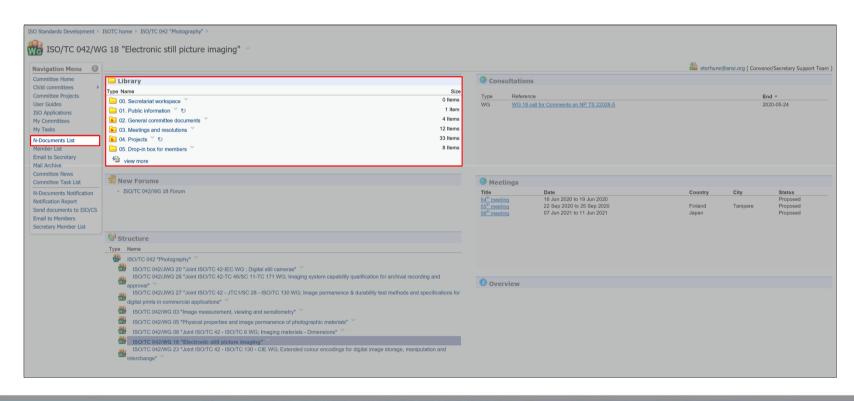


Accessing documents in ISO WGs



Your WG landing page can be bookmarked for future visits, or click on the link included in all document notification emails.

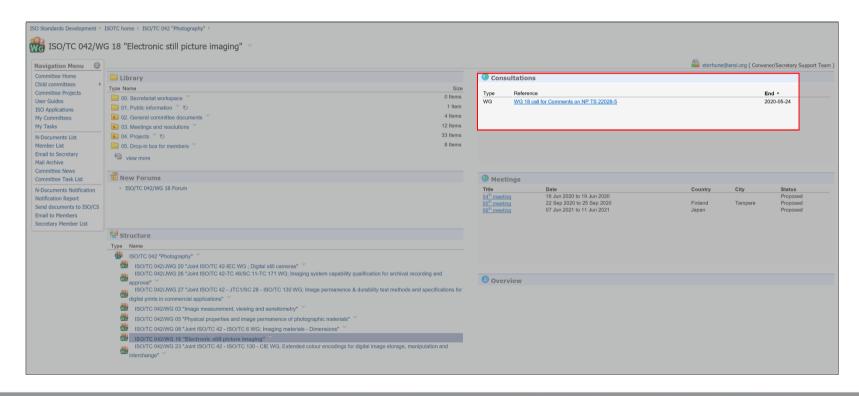
Accessing documents in ISO WGs



Click on "N-Documents List" for all documents, or on any of the Library folders for particular document types.



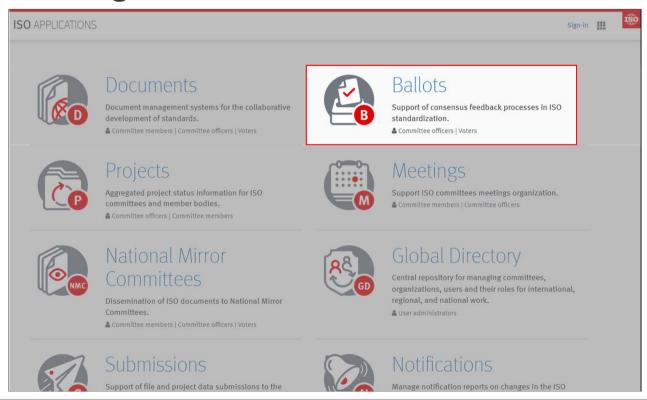
Voting on ISO WG consultation ballots



Any open WG consultation ballots will be shown here.



Voting on ISO WG consultation ballots



You can also navigate to the ISO Ballots portal by clicking here.



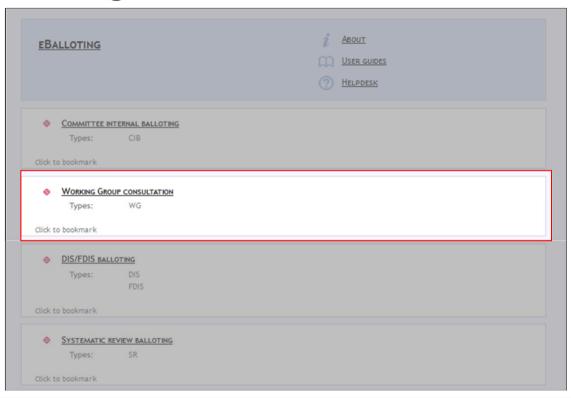
Voting on ISO WG consultation ballots



Many types of ballots are processed through the ISO Ballots portal.



Voting on ISO WG consultation ballots



As a WG member, you would only be dealing with WG consultations. Click here to view yours.



Voting on ISO WG consultation ballots



All open and closed consultations will be listed for all WGs that you are a member of You can search and narrow the list by clicking on the tabs at the top of the page.



Voting on ISO WG consultation ballots



Click "Cast Vote" to register your position. "Help" has instructions on voting, or creating ballots for WG leadership.



• Tips for using the ISO Commenting Template

It's important to fill out the ISO Commenting Template correctly so that the ISO system will accept it with your vote.

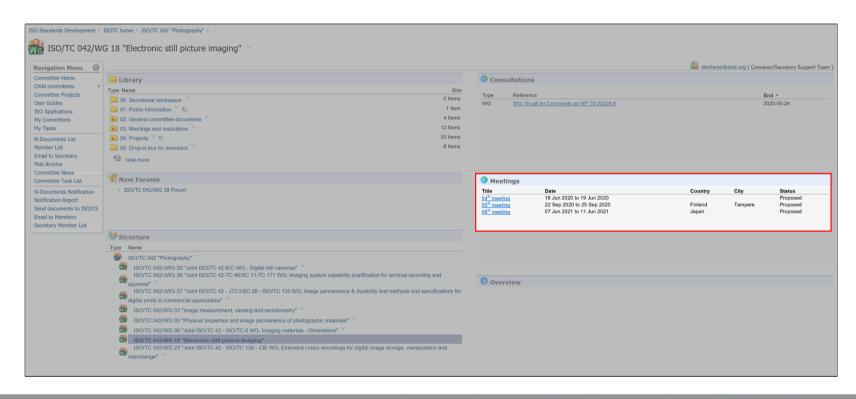
- Tips for using the ISO Commenting Template
  - Enter your initials or name in the "NB/MC" column.
  - If there are no line numbers in the draft, leave the "Line Number" column blank.
  - Do not enter any information in the "Observations" column.
  - Do not change any of the column widths, as the Ballots portal will "reject" the file.
  - Do not type any information outside of the grid.
  - Do not include any grids inside the grid. (A picture of a grid is acceptable.)
  - The Ballots portal will only accept one template per ballot.
  - The Ballots portal will only accept a Word version of the template.



- Tips for using the ISO Commenting Template
  - If your comments include the submission of supplementary materials (such as a graphic file, an Excel file, a chart or another document) this material can be submitted in the ISO Commenting Template by using the following steps:
    - 1. Save the supplementary material as a file on your computer.
    - 2. While in the "Comments" or "Proposed change" fields of the template, click on "Insert" and then "Object".
    - 3. Click on the "Create from File" tab and then "Browse" to select the saved file on your computer.
    - 4. Click on "Display as icon" and then "OK".



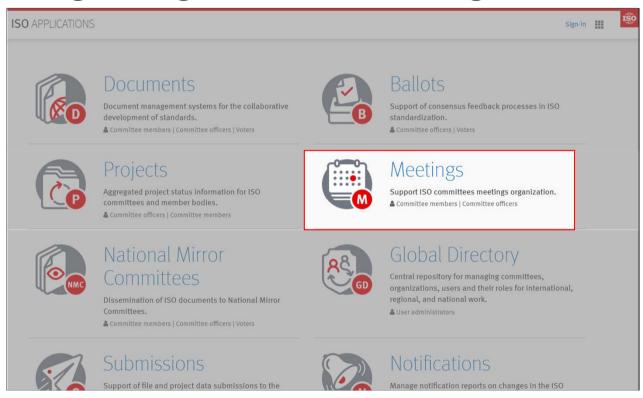
Registering for ISO WG meetings



Any upcoming meetings for your WG will be listed here.



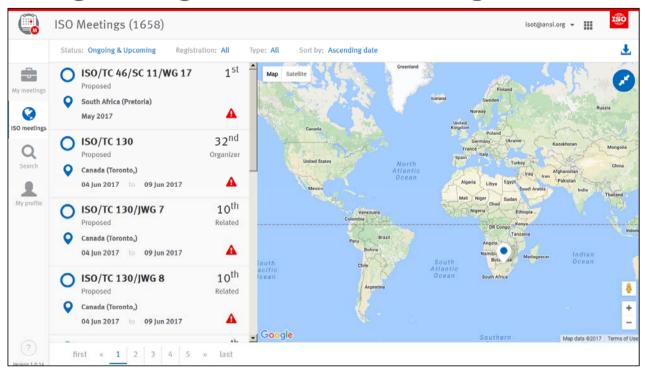
Registering for ISO WG meetings



You can also search for upcoming or past meetings through the link shown.



Registering for ISO WG meetings

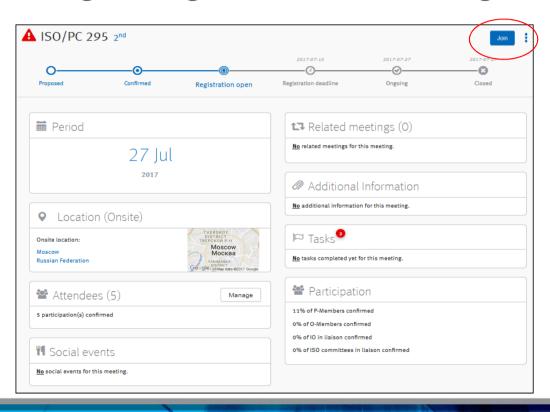


WG members must register themselves for any WG meetings they wish to attend.

Registration to TC, SC and PC meetings must be done through the U.S. TAG.



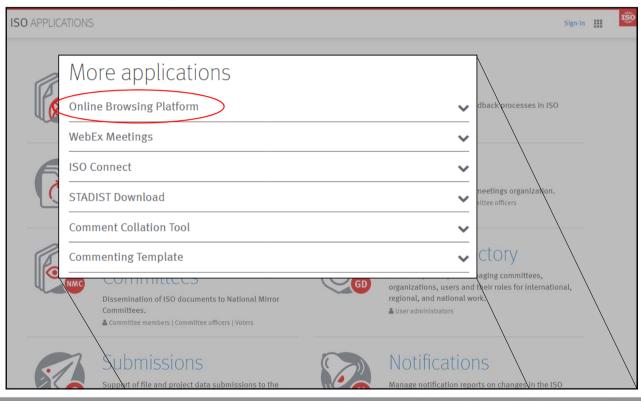
Registering for ISO WG meetings



Click "Join" to register for a meeting.



Other helpful resources – ISO's Online Browsing Platform (OBP)

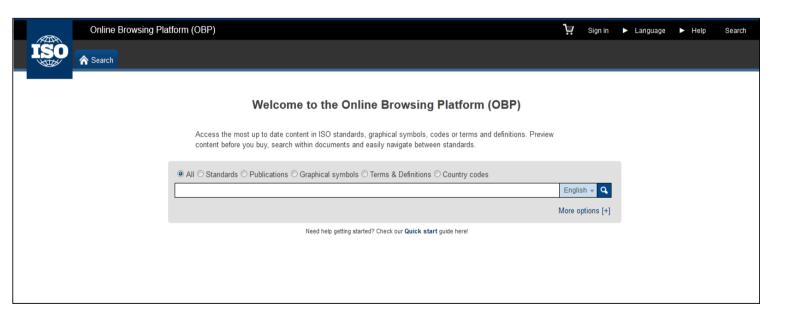


The OBP can be accessed through the link shown or www.iso.org/obp.

This resource is available to anyone without logging in.

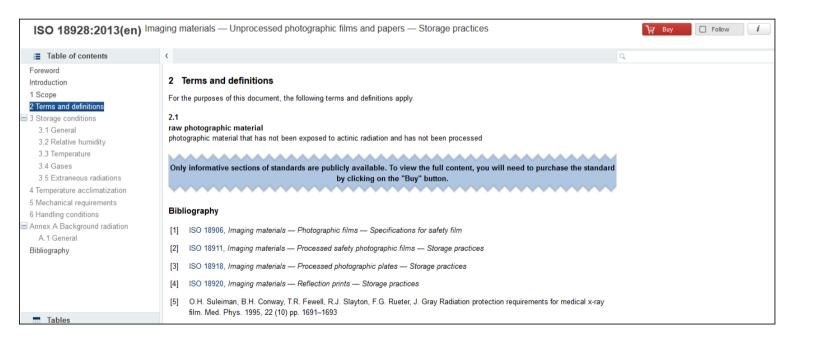


Other helpful resources – ISO's Online Browsing Platform (OBP)



The portal allows users to search for and access upto-date content in all ISO standards, graphic symbols, codes and terms and definitions.

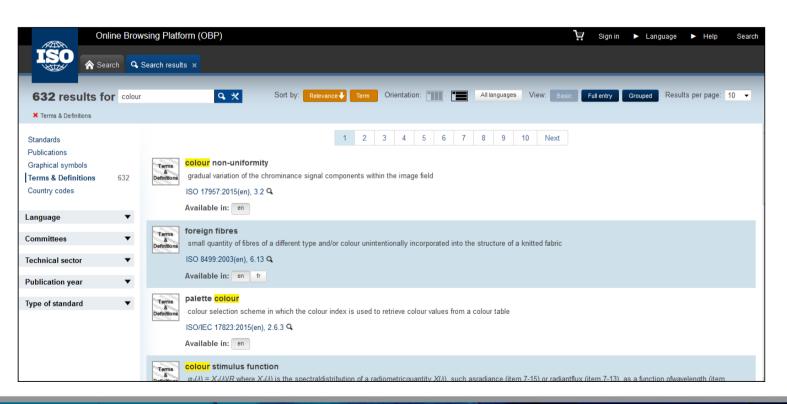
Other helpful resources – ISO's Online Browsing Platform (OBP)



All of the informative sections can be viewed. You can see that there is normative sections, but not view the content.



Other helpful resources – ISO's Online Browsing Platform (OBP)

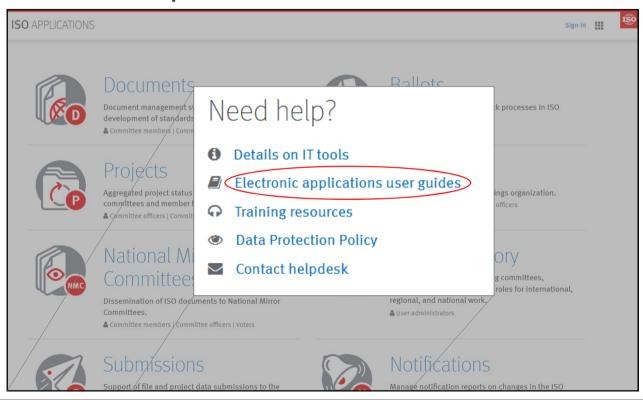


You can see how terms are defined across all ISO publications.

You can preview standards that you may want to reference to check if they are relevant to your work.



• Other helpful resources – ISO's User Guides



User guides can be found through this link or in each of the individual electronic application pages.



Your questions?

• To ask a question, please use the chat feature (to all participants) or raise your hand.

We will send you the slides after the session.



# Thank you!

#### **Edward Terhune**

Senior Program Manager – ANSI's ISO Team isot@ansi.org, eterhune@ansi.org

#### **Sally Seitz**

Senior Manager – Standards Facilitation sseitz@ansi.org

