Training exercises and resolutions

IT Services for MBUA (2021 update)
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1 Global Directory

How to Navigate and Search?

Exercise 1: Using the quick search, try to find your profile, your NSB, one of your national committee

Type your name, your NSB acronym or the TC you are searching for in the quick search field.

You can find any entity when you use the quick search, by default the scope is World
Exercise 2: Using the advanced search, try to find your profile, your organization, your national committees

a) To find your profile using the advanced search, click on the **Search tab (1)**, then **Person Search (2)**, enter your Name (3) and click on **Search button (4)**

By default your National scope is selected, so only persons who are administrated by your organization are displayed

b) To find your organization using the advanced search, click on the **Search tab (1)**, then **Organization Search (2)**, enter the name of your organization (3) and click on **Search button (4)**

By default your National scope is selected, so only organizations that are administrated by your organization are displayed
c) To find your national committees using the advanced search, click on the Search tab (1), then Committee Search (2), enter the reference of your committee (3) and click on Search button (4).

By default your National scope is selected, so only committees that are administrated by your organization are displayed.
Exercise 3: Search a person who is not administered by your NSB

To find a person who is not administrated by your organization, you can search this person:

- Using the quick search (as shown in the exercise 4)
- Using the advanced search (as shown in the exercise 5) but you need to select **World** in the scope.
Exercise 4: Find the User Administrators for your NSB

a) Search for your NSB (see exercise 4) and open the entry

b) On the contextual menu, under Staff roles click on View all roles. In this section you will find your User administrators.

   Note: you can use the Jump to feature to directly access the User administrators section.
Exercise 5: Find the employees of organization for your NSB

a) Search your NSB (see exercise 4) and open the entry.

b) On the contextual menu, under Staff roles click on View all roles. In this section you will find your Employees of organization.
Exercise 6: Find an international organization such as WHO, INLAC etc...

All International organizations are administrated by ISO, so to find an International Organization, under the Organization Search tab, type its acronym (1), select ISO in the Administered by field (2), and ISO in the scope section (3), then click on Search button (4).

You can also find an international organization using the quick search. Type the organization's acronym and click on search. By default the scope is registered as World.
Exercise 7: Find ISO/TC35 and click on the different links to understand the bidirectional relationship

Under the **Committee Search (1)**, search TC 35 (2) and select ISO in the **scope section (3)**.

Click on ISO/TC 35 to see the committee’s details and click on the different associated entities.
How to create and entity?

In your internet browser, go to https://training.iso.org and select Global Directory from the list of ISO electronic applications.

Exercise 8: Create a new person

a) To create a new Person, on the Home page (1), in the Persons section, click on Create new Person (2):

b) Enter values for all mandatory fields (marked with a red *) (3) and click Confirm creation button in the left menu (4):

c) Once registered, in the administrated by field, the name of the organization of the User Administrator who has created this new person is displayed.
- The **Email** is used as the username of the person. Confidential information which should only be accessed by the user himself (e.g. changes of passwords) will be sent to this address.

- The **Notification Email** is used to communicate with the person for regular business matters. If no Notification Email is entered, it will be set to the Personal Email automatically.

- When a person is created in the GD, an email containing a link is automatically sent to him/her. To activate his/her account he/she needs to click on it and select a password.
Exercise 9: Create a new national organization

a) To create a new National Organization, on the Home page (1), in the Organizations section, click on Create new Organization (2):

![Home page screenshot]

b) Enter values for all mandatory fields (marked with a red *) and click Confirm creation button in the left menu:

![Create organization screenshot]

c) Once registered in the administrated by field, the name of the organization of the User Administrator who has created this new organization is displayed:

![Organization administrated by User Administrator]

Postal address is a free-text field. This field is optional, but if you start entering an Address, then Town and Country become required (vice versa).
How to assign roles to an entity?

Exercise 10: Assign your expert as employee of organization of your NSB and add a function

a) **Search** (1) for the expert (see exercises 4 and/or 5)
b) On the **Contextual menu**, under **Staff roles**, select **Manage > Employee of organization** (2)

c) **Select** your organization (1), click on **Add** (2), then on **Save changes** button (3):

To add a function to the role:

d) Click on **Edit icon** :
e) **Select** the function from the drop down list (1), then click on **Add** button (2):

You can also add an alternate title if the person doesn’t represent one of this function.
Exercise 11: Assign your expert as Committee Member of ISO/TC 500

a) **Search** (1) for the expert (see exercises 4 and/or 5)
b) **On the contextual menu, under ISO roles, select Manage > Committee member (2):**

c) **Select** the committee (1), click on **Add** button (2), then on **Save changes** button (3):

d) **Once done, the role is displayed as follow:**
Exercise 12: Assign a person not administered by your organization to the role of Committee Member in ISO/TC 500

a) Search for an expert who is not administrated by your NSB (Exercise 6):

b) On the contextual menu, under ISO roles, select Manage > Committee Member.

In the above scenario, the person is administered by ABNT but assigned as AENOR expert.

c) Select the committee (1), click on Add button (2), then on Save changes button (3)

d) Once done, the role is displayed as follow:
Exercise 13: Assign the role of document monitor to one of the expert administrated by your NSB

a) Search for an expert from your NSB (Exercise 8) (1)
b) On the contextual menu, under ISO roles, select Manage > Document monitor (2):

c) Select the committee (1), click on Add button (2), then on Save changes button (3)
If the person is not registered as NSB Staff, when you assign him/her as Document Monitor for a TC or a TC/SC, the following message will be displayed:

You are assigning the Document Monitor role to a person who is not registered as Employee of your Organization (it is recommended that this role is limited to ISO Member's staff).

Close

If the person is not registered as NSB Staff, when you assign him/her as Document Monitor for a WG, this action cannot be done and the following message will be displayed. Indeed, further to ISO/TMB 69/2009 resolution, a document monitor at WG level must be a NSB Staff.

⚠️ A Document Monitor on a Working group should be registered as Employee of your Organization.

Close
Exercise 14: Assign your expert as CIB voter and add a comment to the role

a) Search for the Expert (see exercises 4 and/or 5) (1)

b) On the contextual menu, under ISO roles, select Manage > Voter (2):

![Image of the interface showing how to select a committee and add a voter]

Select the committee (1), click on Add button (2), then on Save changes button (3):

![Image of the interface showing voter addition and save changes]

.../...
d) The following window will be displayed. As the type of ballot is a mandatory metadata on the role, you must select the type of ballot (1), then click Add button (2):

![Window with Ballot type options]

To add a CIB Voter, your MB must be registered as P or O-member. If it’s not the case, by default, this window won’t display CIB in the Ballot type (as shown in the below example).

![Window with Ballot type options - No CIB]

d) Once finished, don’t forget to click on save changes button on the left menu:
Exercise 15: Search for ISO/TC 500/WG 1 and assign your expert as Committee member

a) **Search** (1) for the expert (see exercises 4 and/or 5)
b) On the **contextual menu**, under **ISO roles**, select **Manage > Committee member** (2):

c) **Select** the committee (1), click on **Add button** (2):
d) The following window will be displayed. As the **stakeholder category** is a mandatory metadata when assigning an expert on ISO working group, you must **select** the category that most closely reflects his/her background:

![Additional information window]

- A - Industry and commerce
- B - Government
- C - Consumers
- D - Labour
- E - Academic and research bodies
- F - Standards application
- G - Non-governmental organization (NGO)

- [Cancel]
- [Add]

---

e) Once finished, don’t forget to click on save changes button on the left menu:

![Save changes button]

**LEGEND**

- `*`: Required
- ` Modified`
Exercise 16: Assign the role of centralized voter for DIS to your expert

a) **Search (1)** for the expert (see exercises 4 and/or 5)

b) On the contextual menu, under ISO roles, select Manage > Centralized voter (2):

![Image of the user interface for assigning a centralized voter]

- **c) As User Administrator** you can only add a centralized voter for your NSB. Select your organization/NSB (1) and click on Add button:

![Image of the user interface for adding a centralized voter]

.../...
d) Select the type of ballot (1) and click on Add button (2):

![Image of Additional information window]

- Select the type of ballot:
  - CB
  - D
  - FDIS
  - Vote to all members
  - SR

- Click on the Add button.

e) Once finished, don’t forget to click on save changes button on the left menu:

![Image of save changes button]

- Click on the Save changes button.

f) Once done, the role is displayed as follow:

![Image of role display]

- Centralized Voter:
  - AENOR
  - Asociación Española de Normalización y Certificación

- Appointed by:
  - AENOR

- Ballot type:
  - D
Exercise 17: Choose an expert from your NSB and assign him/her the role of User Administrator

a) Search for an expert from your NSB (Exercise 8) (1):

b) On the contextual menu, under Staff roles, select Manage > User Administrator (2):

c) Select the acronym of your organization (1), then click on Add button (2):
The following window will be displayed. You must indicate whether this new person is the main point of contact of your NSB or not.

e) Once done, the role is displayed as follow
Exercise 18: Transfer all the roles of your expert to another expert

a) **Search** and select the person who is registered with roles that need to be transferred (1)

b) On the contextual menu, under **Details**, click on **Transfer roles** (2)

```
DETAILS
- View details
- Edit details
- Transfer roles

IDENTITY
- Last name
- First name
- Salutation
- Ms
- Title
- Not specified
```

c) Only roles that are appointed by your organization are displayed:

```
<table>
<thead>
<tr>
<th>Role</th>
<th>Additional information</th>
<th>Clock</th>
<th>Action</th>
</tr>
</thead>
</table>
```

.../...
d) **Select** the target person (1) who should receive the role, then the system will **calculate** (2) which roles can be transferred or not. **Select** the roles you wish to transfer (3), and then click on **save changes** to complete the transfer (4).

![Diagram showing role transfer process](image)

- **Select a person to transfer the roles to**: [Input field]
- **1**: Select the target person
- **2**: Calculate which roles can be transferred
- **3**: Select the roles you wish to transfer
- **4**: Save changes to complete the transfer

---

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

- **Transfer role applies to committee member and Voter role**
- **Transfer role doesn’t apply to centralized roles**
- **Metadata cannot be edited during the transfer**
- **Optional metadata on roles, such as email, comment, won’t be transferred to the new person**
- **Mandatory metadata will be transferred**

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**helpdesk@iso.org**
Exercise 19: Inactivate the expert you have created in exercise 11

To inactivate a person you must first removed all his/her roles.

a) **Search** and select the person you wish to inactivate (1).

You can only inactivate a person who is administrated by your organization.

b) **On the contextual menu**, under the section **Status**, select **Manage > Inactivate** (2)

A mandatory comment will be requested (in order to improve data quality). Enter it and click on the **Confirm** button:

```
Confirm changing the status to Withdrawn

Comment

This person has retired
```

Cancel  Confirm
d) Once done, the summary banner is hatched and the person is displayed as inactive.

An inactivated person can be activated again. However to be reactivated, the person must be registered with all mandatory information (First Name, Last Name, Email and Salutations). If needed, you can edit an inactive profile to update it before reactivating it.
Exercise 20: Add AOS as P-member of a TC of your choice

Search for the organization AOS and open the profile. Click Manage ISO Roles and select P-member

Enter the committee you wish to add and click on Add

Click Add to register the new participation.

Click on Save Changes
Exercise 21: Downgrade the membership you have assigned in exercise 23 to O-member

Go to AOS profile and display the Committee roles for the organization:

Click on To O-Member next to the committee you have added as P-member in exercise 23

Exercise 22: Remove the membership you have assign in exercise 23

Go to AOS profile and display the Committee roles for the organization:

Scroll down to display the O-member and click on Edit
Click on **Delete** next to the committee you want to remove and **save changes**
2 Ballots

In your internet browser, go to https://training.iso.org and select Ballots from the list of ISO electronic applications.

Exercise 23: Find an open CIB and cast a vote.

a) From the All open, move the cursor to a particular ballot for which you wish to cast a vote and click on the ballot reference link.
b) The ballot opens and the following screen with ballot metadata and attached ballot documents (if there are any) is displayed.

```
   Committee internal balloting

   Search > TC 34 N 1272

   Information Participation

   Metadata
   Reference: TC 34 N 1272
   Type: CIB (Committee Internal Ballot)
   Start date: 2008-07-23
   End date: 2016-08-05
   Status: Open
   Reference documents and links:
   N_1272_New scope_cover letter

   Questions and answers
   No. Questions Possible Answers
   1. Do you agree with the scope?
      Yes
      No
      Absent

   (*) A Comment is required for this answer value.

   Back to list of ballots
```

c) In order to cast a vote, click on **Cast vote**.
d) Respond to the vote and click on **Cast Vote**.

**Committee internal balloting**

**Search > TC 34 N 1272**

**Reference:** TC 34 N 1272

Committee / Working Group: ISO/TC 34
Status: Open
Opening date: 2008-07-23
Closing date: 2016-08-05

**Vote:** Andorra (AOS)

Do you agree with the scope?

[ ] Yes
[ ] No

[ ] select an answer

[ ] Cast vote
[ ] Reset
[ ] Cancel

---

**Exercise 24:** Open a closed DIS/FDIS ballot and download its results/comments (ZIP file)

a) In the Electronic Balloting Portal homepage, select DIS/FDIS ballots.

b) Click on the tab **Closed last 2 weeks** (if there is no ballot displayed here, open the **Search** tab and search for ballots with the status **Closed**) and open a ballot.

c) In the **Result** tab, download on your desktop the **voting result and comments as a Zip file** (click on the Zip icon).
d) Extract the content of the Zip file on your desktop by opening the Zip archive and clicking on Extract.

![Extract button in File Explorer]

- **Comment Files**
- **index.pdf**
- **index.rtf**

e) Browse the content of the extracted folder on your desktop (result of voting/index.pdf, Comment files).
Exercise 25: Download the ISO Template for Comments

a) From the balloting portal, go to **Tools** and select **Comment Collation tool**:

![Comment Collation tool](image)

b) From the next Livelink page, click on the ISO Commenting template:

![ISO Commenting template](image)
3 National Mirror Committees (NMC)

In ISO Global Directory

In your internet browser, go to https://training.iso.org and select Global Directory from the list of ISO electronic applications.

Exercise 26: Create a National committee

a) On the Home page, click on Create New Committee:

![Create New Committee](image)

b) Select the field of the committee (Technical or Policy development):

![Select Committee Field](image)
c) Enter the mandatory national committee details (1) and confirm its creation (2):

- A newly created committee will be in the status “in progress”. You can modify any field in the newly created committee while in this status. Once a committee has been activated the committee's reference can no longer be modified.
- The acronym should never start with ISO, IEC, ISO/IEC, CEN, CENELEC, CEN/CLC or CEN-CENELEC

d) To activate your committee, on the contextual menu, under Status, select Manage > Activate:
Exercise 27: Map ISO committees to the national committee

a) On the contextual menu of your national committee, under Committee mapping, select Manage > ISO Committee mapping.

b) Select the committee you wish to map (1), click on Add button (2), and then click on Save changes (3).

Your NSB must be P or O-member to be able to mirror an ISO committee.
Exercise 28: Assign users (national experts) as National members

a) **Search** your committee.
b) On the **contextual menu**, under **National roles**, select **Manage > National committee member**

c) **Enter** the name of the person (1), click on **Add** button (2) and then on **save changes (3)**.
Exercise 29: Search for your National committees using the Search feature in GD

a) To find your national committees click on the **Search tab (1)**, then **Committee Search (2)**, enter the reference of your committee **(3)** and click on **Search button (4)**.

By default your National scope is selected, so only committees that are administrated by your organization are displayed.
On the NMC server

In your internet browser, go to https://training.iso.org and select National Mirror Committees from the list of ISO electronic applications.

Exercise 30: Login to NMC server and access a national committee

a) Select the National Mirror Committees from the SSO login page

In order to be able to see any national committee, you need to be registered as a member (or secretary, chair etc.) of that National committee. Note that the role of User Administrator (MBUA) provides visibility of all National committees of the NSB.

b) After login, you will be directed to your National Committees’ home area. Click on Committee workspace to list all your National Committees and click on the national committee you want to view
Exercise 31: View the ISO committees mapped to your National committee

You can access documents by navigating through the folder structure and finding the documents there. In the **ISO and CEN Documents** folder you will find the list of all ISO and CEN Committees mapped to your National committee respectively.

To view documents for one of the mapped committee, click on the committee name:

On the next window, you can navigate through the ISO or CEN committee structure to view the mirrored documents:
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Exercise 32: Open the international document list

a) Click on International documents. The documents from the committees and working groups which have been mapped to the particular National committee will be displayed (sorted in descending order of their N-number):

b) The documents from the committees and working groups which have been mapped to the particular National committee will be displayed (sorted in descending order of their N-number):

By clicking on the headers of each column, it is possible to sort the list based on the chosen column. Clicking a second time inverts the sort order.
4 Meetings

Exercise 33: In My meetings, filter for meetings in “registration open” status and register a person to the meeting.

Go to the filter My meetings and select a meeting in status: Registration Open.

From the meeting overview, click on the 3 dots and select: Register a person

Search for a participant name (select any name) and complete the registration details and click on save.