



National Project Portal (NPP)

User guide for MBUAs and Secretaries v1.1

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1 Introduction

The National project portal is designed to provide a simple web interface to manage the national projects.

The main functionalities are the following:

- Creation/update/deletion of projects
- Search on projects with criteria
- Association of a project to a national committee
- Simple workflow to modify the stages of a project
- History of a project
- Customization of the possible stages of a project
- Automatic display of the ISO and CEN committees related to a national committee



The creation/update/deletion of national committees is done in the ISO Global Directory as well as the mapping between national committees and ISO committees.

2 Logging in and logging out

2.1 Logging in

Your username will be sent to you by e-mail after your initial registration by your National Member Body in the ISO Global Directory and will contain a link to choose a password and activate your account. Please follow the instructions in the email to activate your account and choose a password.

After activating your account, follow these steps to login:

- a) Start your Internet browser and open the following URL: <https://isolutions.iso.org>
- b) Click on **National Project Portal**

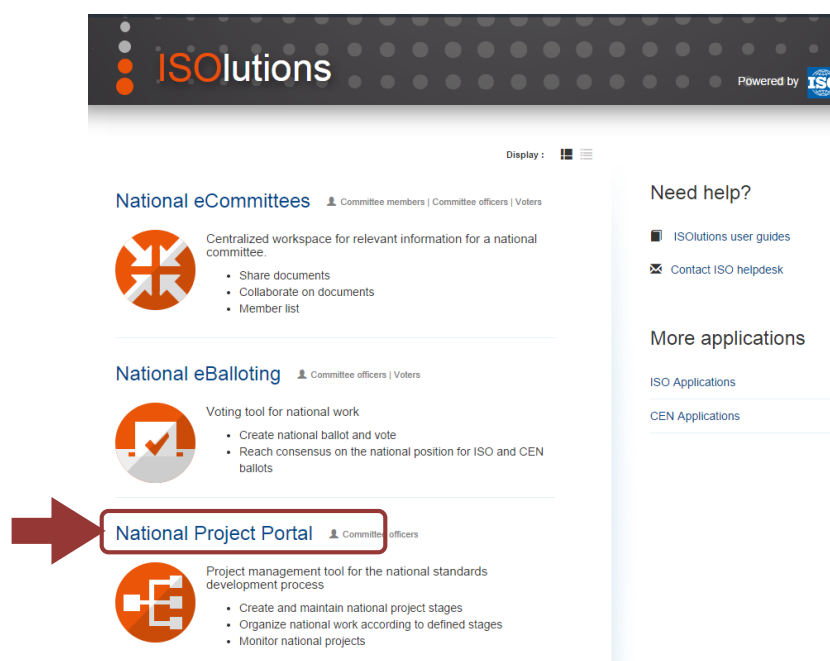


Figure 1 - Sign into applications

- c) Enter your username and password
- d) Read the declaration and tick the box to accept the conditions

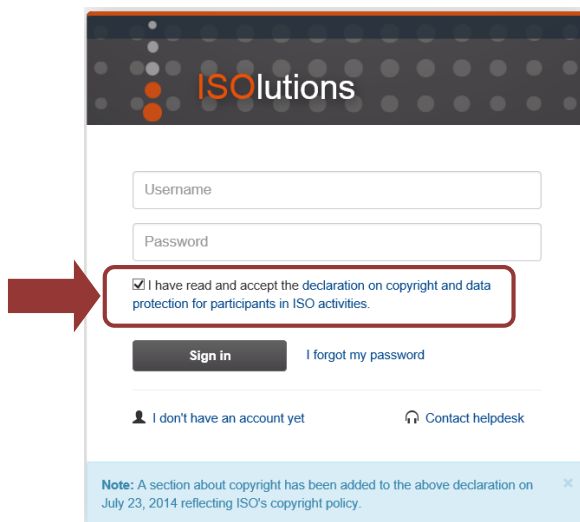


Figure 2 - ISOlutions Electronic Applications Login screen

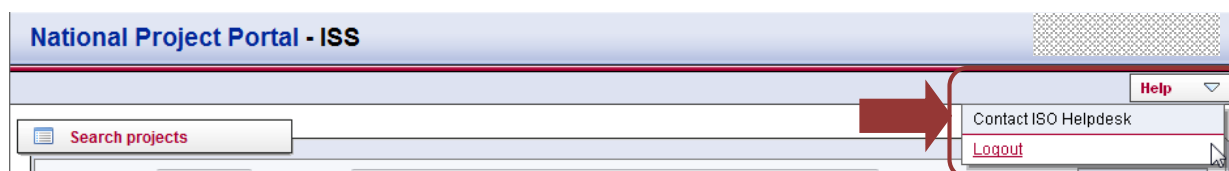


Please note that both username and password are case-sensitive, i.e. they have to be entered exactly as provided.

e) Click on **Sign in**

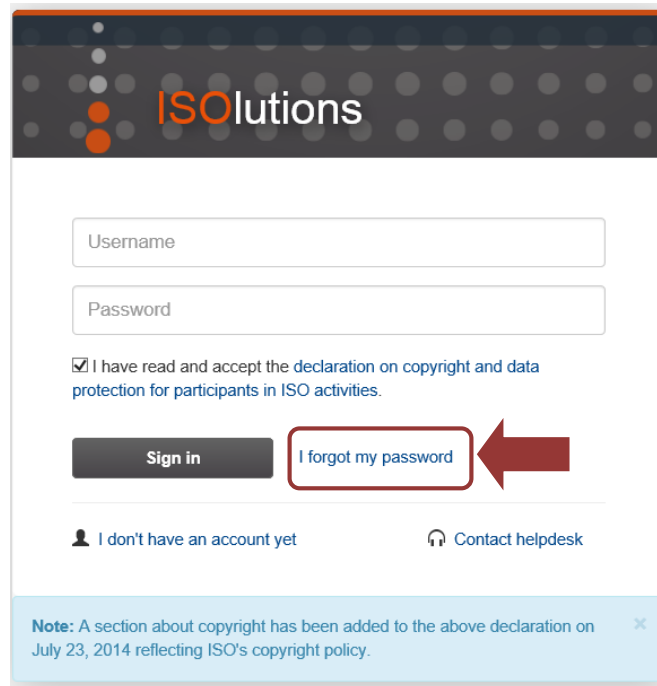
2.2 Logging out

To Logout of the National Project Portal, select **Logout** from the **Help Menu**:



2.3 Password/username forgotten

If you forgot your password, click on the link **I forgot my password** on the login screen 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.



The screenshot shows the ISOolutions login interface. At the top is the ISOolutions logo. Below it are two input fields: 'Username' and 'Password'. A checkbox is checked, with the text 'I have read and accept the declaration on copyright and data protection for participants in ISO activities.' Below the inputs are two buttons: 'Sign in' and 'I forgot my password'. The 'I forgot my password' button is highlighted with a red rectangle and a red arrow points to it from the right. Below the buttons are two links: 'I don't have an account yet' and 'Contact helpdesk'. At the bottom, a light blue note box contains the text: 'Note: A section about copyright has been added to the above declaration on July 23, 2014 reflecting ISO's copyright policy.'

Figure 3 - Password forgotten

3 Searching for Projects

When logging into the National Project Portal, you are directed to the **Search Projects** screen. From here you can search for specific projects by different predefined criteria. When you have selected all the criteria you need, click on **Search** next to the search fields to launch the search or on **Reset** to set all criteria back to blank:

Available search fields/ criteria:

Field Name	Description
Committee	Drop-down menu with a list of Committees you have access to.
Stage	Drop-down menu with the list of stages defined for your Committee projects.
Project ID	The Project ID of the project
Title	The title of the project
Doc. N°	The document number of the project (defined at project creation)
Part n°	The part number of the project (defined at project creation)

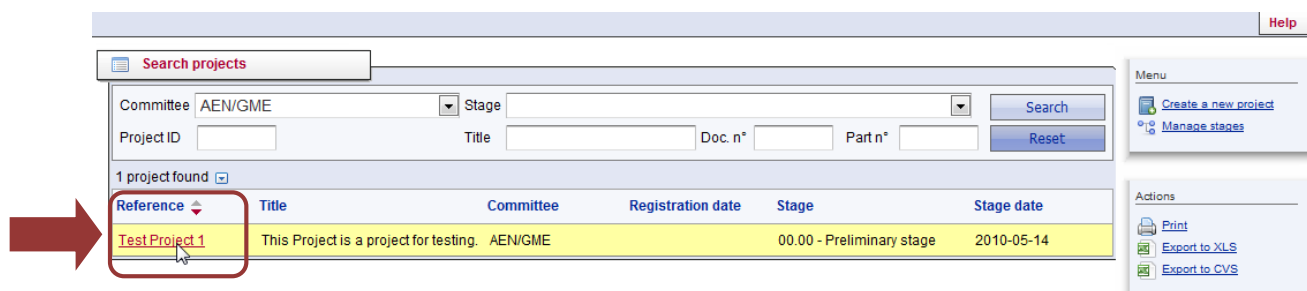
You can enter as many criteria as you like to narrow-down your search.

After launching the search, the **search results** will be displayed below the search fields:

You can sort by different columns by clicking on the column header.

4 Viewing Project Details

To view the details of a project, open the **Project details** by clicking on the project reference from the Project list.



Search projects

Committee: AEN/GME Stage: Search Reset

Project ID: Title: Doc. n°: Part n°:

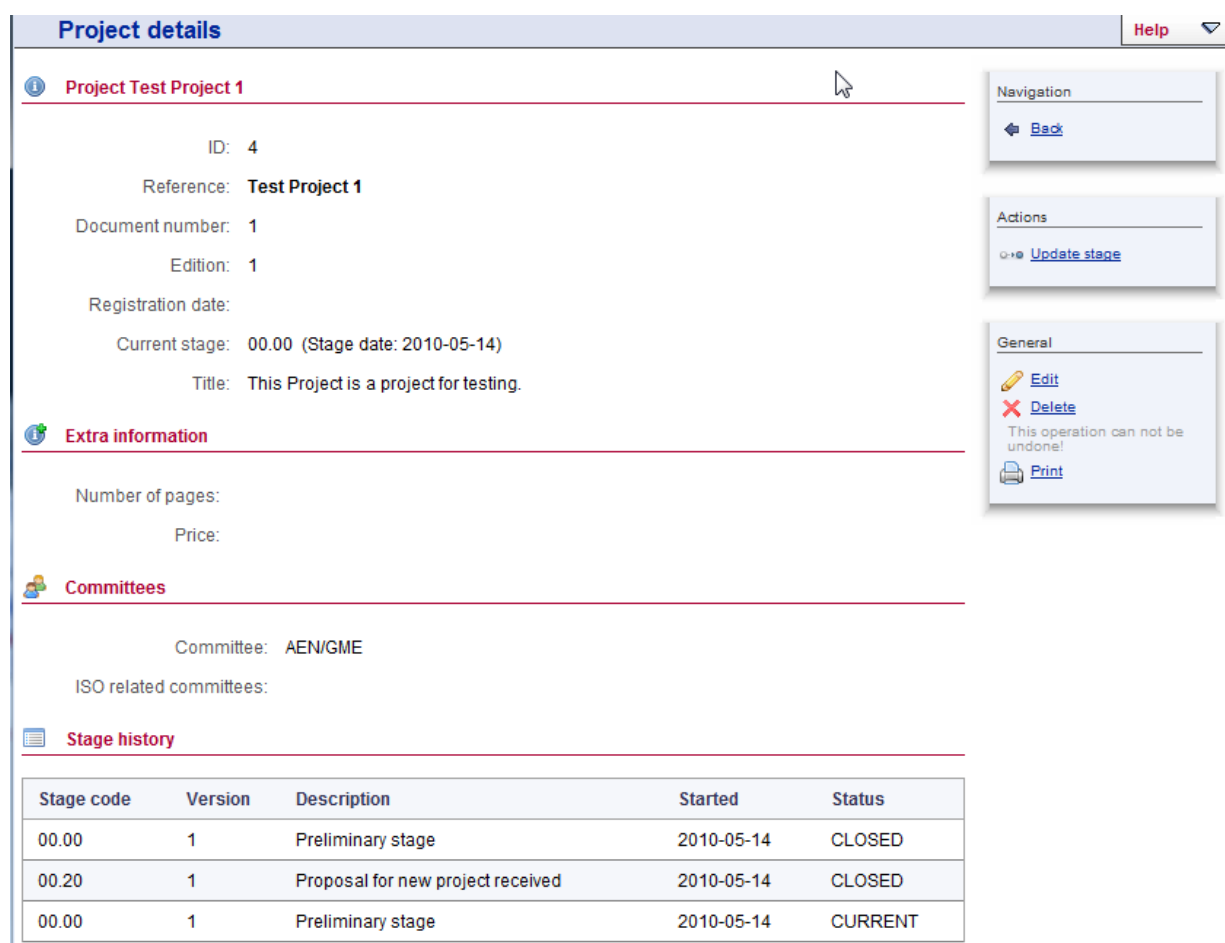
1 project found

Reference	Title	Committee	Registration date	Stage	Stage date
Test Project 1	This Project is a project for testing.	AEN/GME	00.00 - Preliminary stage	2010-05-14	

Menu: Create a new project, Manage stages

Actions: Print, Export to XLS, Export to CVS

The Project details screen opens. Here you can see all the information relative to the project:



Project details

Project Test Project 1

ID: 4

Reference: Test Project 1

Document number: 1

Edition: 1

Registration date:

Current stage: 00.00 (Stage date: 2010-05-14)

Title: This Project is a project for testing.

Extra information

Number of pages:

Price:

Committees

Committee: AEN/GME

ISO related committees:

Stage history

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED
00.20	1	Proposal for new project received	2010-05-14	CLOSED
00.00	1	Preliminary stage	2010-05-14	CURRENT

Navigation: Back

Actions: Update stage

General: Edit, Delete, Print

This operation can not be undone!

4.1 Printing Project details

From the Project details screen, select **Delete** from the **General** menu on the right side of the screen.

Project details

Help

Project Test Project 1

ID: 4

Reference: **Test Project 1**

Document number: 1

Edition: 1

Registration date:

Current stage: 00.00 (Stage date: 2010-05-14)

Title: This Project is a project for testing.

Extra information

Number of pages:

Price:

Committees

Committee: AEN/GME

ISO related committees:

Stage history

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED
00.20	1	Proposal for new project received	2010-05-14	CLOSED
00.00	1	Preliminary stage	2010-05-14	CURRENT

Navigation

Back

Actions

Update stage

General

Edit

Delete

This operation can not be undone.

Print

A printer friendly version of the project details will open in a new window and your machine's printer panel will open where you can select the printer and the printing properties.

5 Create a new project

To create a new project, click on **Create a new project** from the menu on the right side of the screen:

The screenshot shows a web interface for searching projects. On the left, there's a 'Search projects' section with a search bar and a table of results. The table has columns: Reference, Title, Committee, Registration date, Stage, and Stage date. Below the table, it says 'No project match the entered criteria, please change your criteria and try again.' On the right, there's a 'Menu' section with two links: 'Create a new project' and 'Manage stages'. Below that is an 'Actions' section with links for 'Print', 'Export to XLS', and 'Export to CVS'. A red arrow points from the 'Create a new project' link to the 'Save' button in the search form.

You will be directed to the **Project details – edit screen** in which you can enter the information relative to your project. Enter at least the mandatory information for your new project as shown below and click **Save** at the bottom of the screen:

The screenshot shows the 'Project details - edit' screen. The form is divided into several sections:

- Project**: Contains fields for ID (2), Reference (*: Test Project 1), Document number (*: 2), Part number, Registration date, Edition (1), and Title (*: This Project is a project for testing.).
- Reference**: A text box explaining that the reference is the project that will be displayed in the project list.
- Document number**: A text box explaining that the document number is the unique document number for the project.
- Title**: A text box explaining that the title is the title of the project displayed in the project list.
- Extra information**: Contains fields for Number of pages and Price.
- Committees**: Contains a dropdown menu for Committee (AEN/GME).

A red arrow points to the 'Save' button at the bottom of the form.

Optional information for your project:

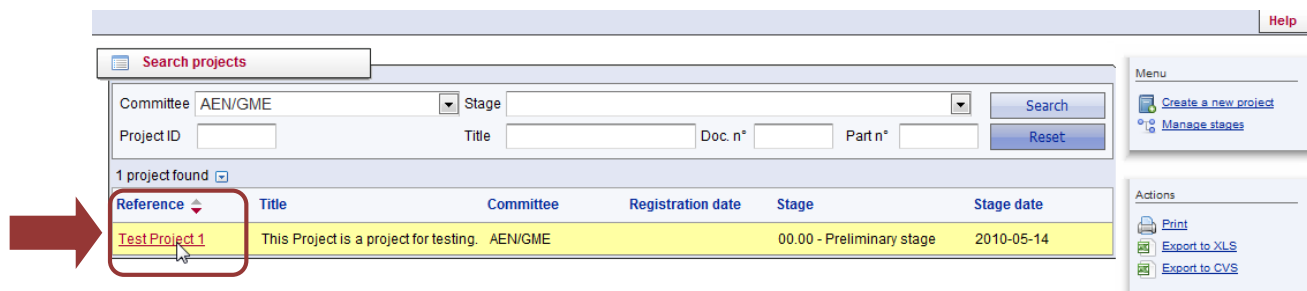
Field	Contents
Part number	Some projects are divided into several parts. The part number is a free text.
Registration date	The date on which the project was first registered. <i>Note: this does not have to coincide with the creation date in the system!</i>
Edition	The same project with the same reference can be revised, amended, reviewed etc... Every time, the edition number can be increased. <i>Note: by default, the value for this field will be set to 1</i>
Number of pages	The number of pages in your project. It's a free text to allow defining the number of pages of several languages.
Price	The retail price you want to set for your project. It's a free text.



*By default, your project will be created in the first stage of your workflow and the stage date will be set to the creation date of the project in the system. You can define the stages and the order of stages through the **manage stages** screen.*

6 Editing a project

To edit a project, open the **Project details** by clicking on the project reference from the Project list.



Search projects

Committee: AEN/GME Stage: Search Reset

Project ID: Title: Doc. n°: Part n°:

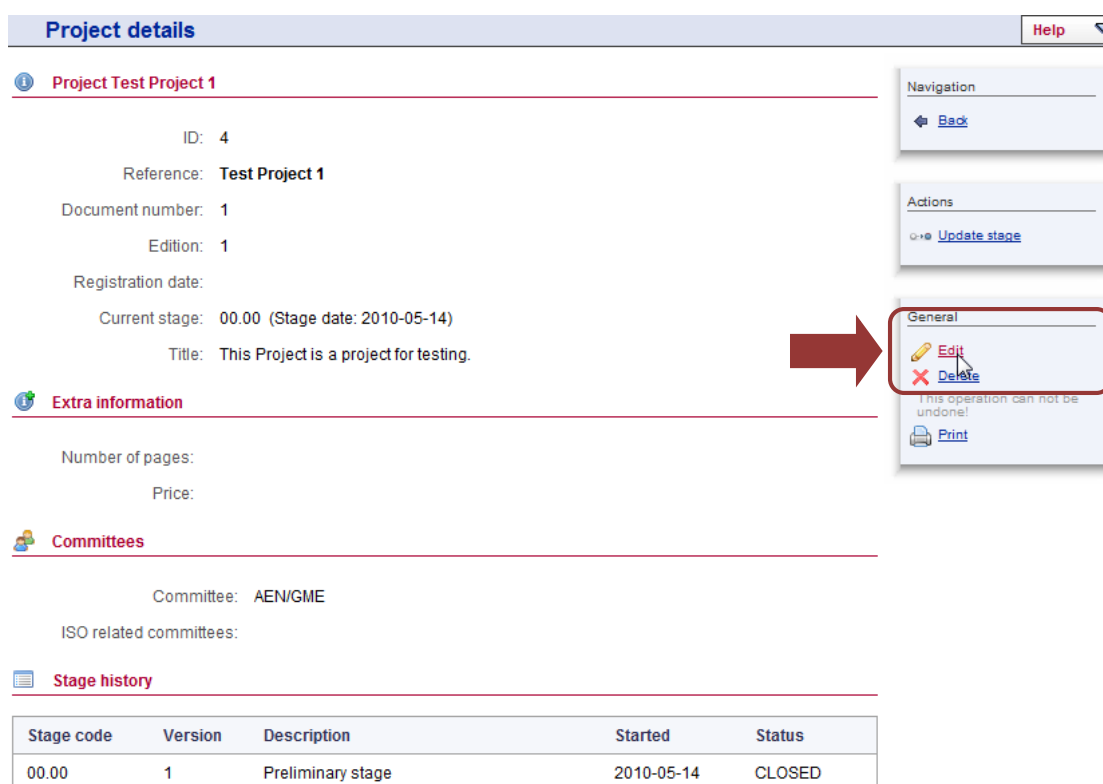
1 project found

Reference	Title	Committee	Registration date	Stage	Stage date
Test Project 1	This Project is a project for testing.	AEN/GME	00.00 - Preliminary stage	2010-05-14	

Menu: Create a new project, Manage stages

Actions: Print, Export to XLS, Export to CVS

From the Project details screen, select **Edit** from the **General** menu on the right side of the screen.



Project details

Project Test Project 1

ID: 4

Reference: Test Project 1

Document number: 1

Edition: 1

Registration date:

Current stage: 00.00 (Stage date: 2010-05-14)

Title: This Project is a project for testing.

Navigation: Back

Actions: Update stage

General: Edit, Delete, Print

Extra information

Number of pages:

Price:

Committees

Committee: AEN/GME

ISO related committees:

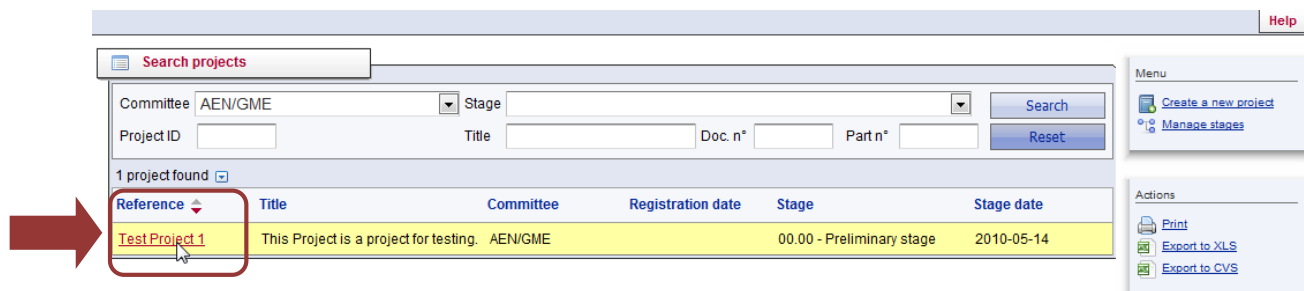
Stage history

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED

The fields of the Project are now available for editing. When you have done all the changes you want, click on **Save** at the bottom of the page.

7 Deleting a project

To delete a project, open the **Project details** by clicking on the project reference from the Project list.



Search projects

Committee: AEN/GME Stage: Search Reset

Project ID: Title: Doc. n°: Part n°:

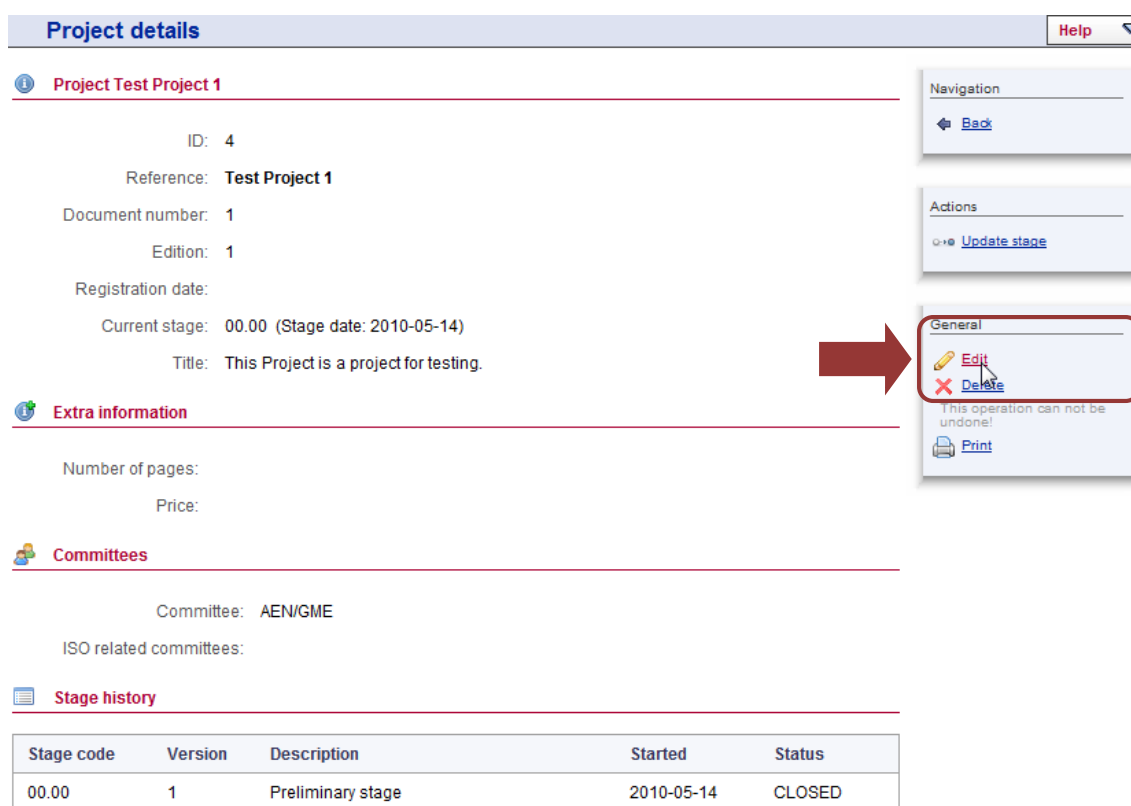
1 project found

Reference	Title	Committee	Registration date	Stage	Stage date
Test Project 1	This Project is a project for testing.	AEN/GME		00.00 - Preliminary stage	2010-05-14

Menu: Create a new project, Manage stages

Actions: Print, Export to XLS, Export to CVS

From the Project details screen, select **Delete** from the **General** menu on the right side of the screen.



Project details

Project Test Project 1

ID: 4

Reference: Test Project 1

Document number: 1

Edition: 1

Registration date:

Current stage: 00.00 (Stage date: 2010-05-14)

Title: This Project is a project for testing.

Navigation: Back

Actions: Update stage

General: Edit, Delete, Print

This operation can not be undone!

Extra information

Number of pages:

Price:

Committees

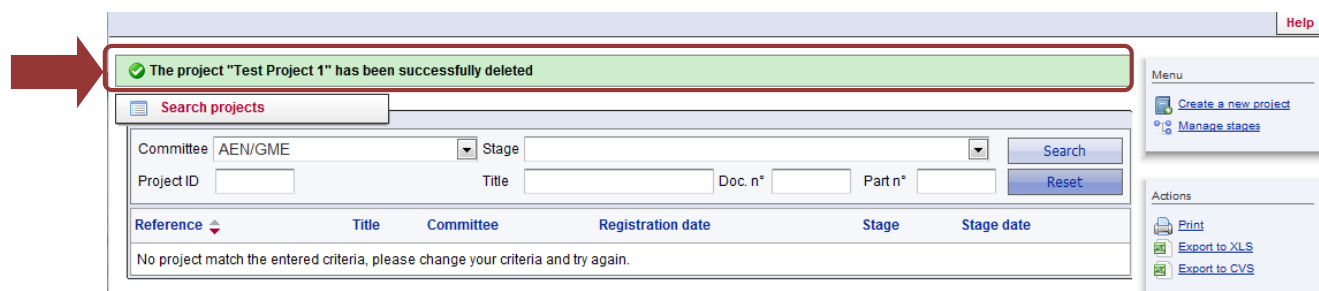
Committee: AEN/GME

ISO related committees:

Stage history

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED

Click **OK** on the deletion confirmation pop-up to confirm the deletion of the project. You will be redirected to the Search **Projects** page and a notification at the top of the screen will confirm the successful deletion of your project:



Search projects

Committee: AEN/GME Stage: Search Reset

Project ID: Title: Doc. n°: Part n°:

Reference: Title: Committee: Registration date: Stage: Stage date:

No project match the entered criteria, please change your criteria and try again.

Menu: Create a new project, Manage stages

Actions: Print, Export to XLS, Export to CVS



Deletion of a project cannot be undone! Please be careful when deleting projects as the data cannot be recovered.

8 Changing the stage of a project

To move your project from one stage to another, go to the **Project details screen** and select **Update stage** from the **Actions** menu on the right side of the screen:

Project details

Help

Project Test Project 1

ID: 4

Reference: **Test Project 1**

Document number: 1

Edition: 1

Registration date:

Current stage: 00.00 (Stage date: 2010-05-14)

Title: This Project is a project for testing.

Extra information

Number of pages:

Price:

Committees

Committee: AEN/GME

ISO related committees:

Stage history

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED

Navigation

Back

Actions

Update stage

General

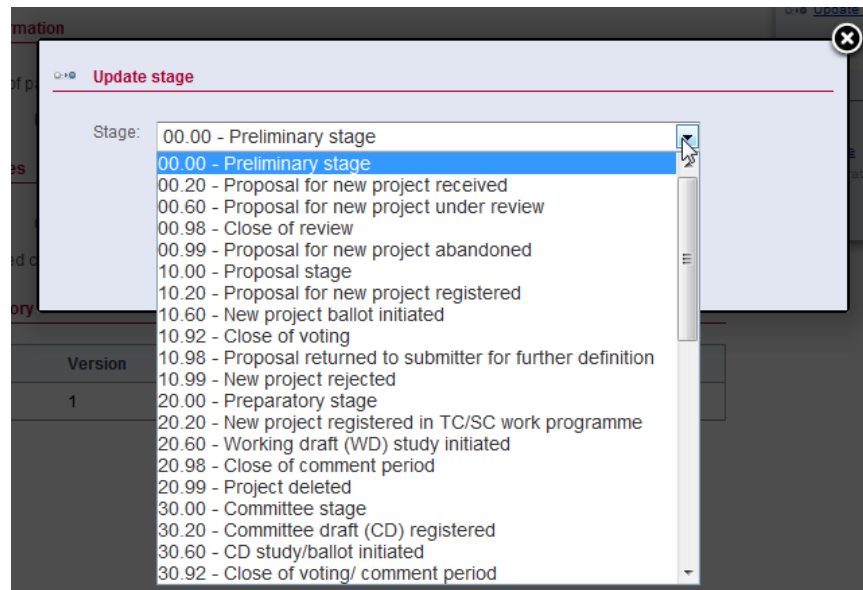
Edit

Delete

This operation can not be undone!

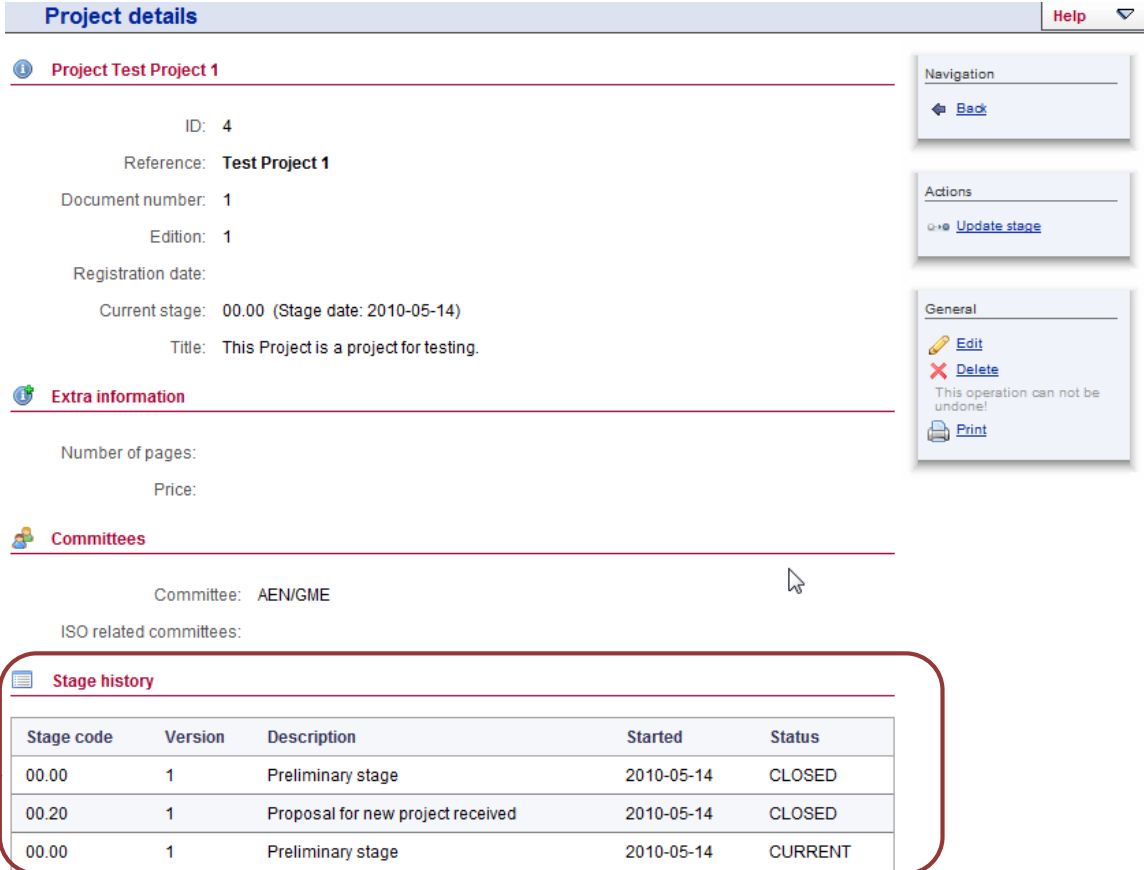
Print

Select the stage to which you would like to move your project from the drop-down menu and click **Save**:



The project will now be updated with the new stage. The stage date for the new stage will be automatically set to the date of the stage change. The previous stage will be closed.

On the **Project details** screen, the **history of the stages** is shown at the bottom of the screen:



The screenshot shows the 'Project details' screen for 'Project Test Project 1'. The main content area displays project information: ID: 4, Reference: Test Project 1, Document number: 1, Edition: 1, Registration date, Current stage: 00.00 (Stage date: 2010-05-14), and Title: This Project is a project for testing. Below this is the 'Extra information' section with fields for Number of pages and Price. The 'Committees' section shows Committee: AEN/GME and ISO related committees. At the bottom, the 'Stage history' section is highlighted with a red box and a red arrow pointing to it. The 'Stage history' table lists three stages: 00.00 (Preliminary stage, CLOSED), 00.20 (Proposal for new project received, CLOSED), and 00.00 (Preliminary stage, CURRENT). On the right side, there are three panels: 'Navigation' with a 'Back' button, 'Actions' with an 'Update stage' button, and 'General' with 'Edit', 'Delete', and 'Print' buttons. A warning message states: 'This operation can not be undone!'.

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED
00.20	1	Proposal for new project received	2010-05-14	CLOSED
00.00	1	Preliminary stage	2010-05-14	CURRENT



The system allows you to **move freely between stages**. Even though there might be a logical order to your stages, the system will allow you to go from any stage to any other stage, even back to a previous stage as shown below:

Stage code	Version	Description	Started	Status
00.00	1	Preliminary stage	2010-05-14	CLOSED
00.20	1	Proposal for new project received	2010-05-14	CLOSED
00.00	1	Preliminary stage	2010-05-14	CURRENT

9 Managing Project Stages

In order to enable the creation of Projects in the National Project Portal, the project stages need to be configured at initial setup. When your National Project Portal is first created, there are no project stages set. This allows you to freely define your project stages and their sequence, numbering etc.

To start the initial setup of your project stages or to modify the existing stages, select **Manage Stages** from the menu on the right side of the **Search projects** screen:

The screenshot shows the 'Search projects' interface. On the right, a 'Menu' box contains two links: 'Create a new project' and 'Manage stages'. A red arrow points from the 'Reset' button in the search criteria section to the 'Manage stages' link.



To return to the Search Projects screen and your list of projects, click on Back from the Navigation menu on the Manage stages screen.

The screenshot shows the 'Manage stages' interface. On the right, a 'Navigation' box contains a 'Back' link. A red arrow points from the 'Back' link to the 'Search projects' screen.

9.1 Initial setup of project phases

The stages defined at initial setup will apply to all the projects in your National Project Portal. You can add/ delete/ edit stages and their order at any time after the initial setup.

Select **manage stages** from the Menu as shown above. This will take you to the Manage stages screen, which will be empty the first time you access it since no stages have been defined yet. Click on **Add Stage** to start the setup of stages:

The screenshot shows the 'Manage stages' interface. On the right, an 'Actions' box contains a link 'Add a stage'. A red arrow points from the 'Add a stage' link to the 'Add a stage' button.

Enter the **stage code** and **stage description** in the pop-up window and click on **Save** to create your first project stage:

The newly created stage will now be shown on the list of stages in the **Manage Stages** screen:

Stage code	Stage description	Action
S_001	The first stage of my project	Edit Delete

Continue to add as many stages as you want and follow the instructions in the next section to delete, edit or move a stage up and down in the hierarchy.



The stage codes and stage descriptions are free text fields, therefore you can freely decide on the coding and description of your stages. It is highly recommended to define a coding and naming convention before starting to add the stages in order to have a comprehensive structure of stages.

9.2 Updating stages

On the Manage stages screen, you will see the list of stages for your project. You can

- **Add** a stage [Add a stage](#)
- **Delete** a stage [Delete](#)
- **Edit** a stage [Edit](#)
- **Move** a stage up and down in the hierarchy [Up](#) [Down](#)

9.2.1 Add a stage

To add a stage, click on **Add a stage** from the Actions menu on the right of the screen:

Stage code	Stage description	Action
00.00	Preliminary stage	Edit Delete Down
00.20	Proposal for new project received	Edit Delete Up Down
00.60	Proposal for new project under review	Edit Delete Up Down
00.98	Close of review	Edit Delete Up Down

Navigation: [Back](#)

Actions: [Add a stage](#)

Enter the **stage code** and **stage description** and select before which existing stage you would like to add the stage. Click on **Save** to complete the stage addition process:

Add a stage

Stage code *: 00.000

Stage description *: The very first stage

Insert before:

- 00.00 - Preliminary stage
- 00.20 - Proposal for new project received
- 00.60 - Proposal for new project under review
- 00.98 - Close of review
- 00.99 - Proposal for new project abandoned
- 10.00 - Proposal stage
- 10.20 - Proposal for new project registered
- 10.60 - New project ballot initiated
- 10.92 - Close of voting
- 10.98 - Proposal returned to submitter for further definition
- 10.99 - New project rejected
- 20.00 - Preparatory stage
- 20.20 - New project registered in TC/SC work programme
- 20.60 - Working draft (WD) study initiated
- 20.98 - Close of comment period
- 20.99 - Project deleted
- 30.00 - Committee stage
- 30.20 - Committee draft (CD) registered
- 30.60 - CD study/ballot initiated



If you do not select a stage before which to insert the new stage, the system will automatically create it as the last stage.

You can modify the position of the stage at any time by moving the stage up or down in the hierarchy through the Manage Stages screen.

9.2.2 Delete a stage

To delete a stage, click on **delete** next to the stage you would like to delete:

Manage stages		
Stage code	Stage description	Action
00.000	The very first stage	Edit Delete Up Down
00.00	Preliminary stage	Edit Delete Up Down
00.20	Proposal for new project received	Edit Delete Up Down
00.60	Proposal for new project under review	Edit Delete Up Down
00.98	Close of review	Edit Delete Up Down

9.2.3 Edit a stage

You can edit the stage code and stage description by clicking on **Edit** next to the stage you'd like to modify:

Manage stages		
Stage code	Stage description	Action
00.000	The very first stage	Edit Delete Down
00.00	Preliminary stage	Edit Delete Up Down
00.20	Proposal for new project received	Edit Delete Up Down
00.60	Proposal for new project under review	Edit Delete Up Down
00.98	Close of review	Edit Delete Up Down

Modify the values you want and click **Save** to complete the stage edition process:

Add a stage

Stage code *: 60.000

Stage description *: The very last stage

9.2.4 Move a stage up or down in the hierarchy

To change the sequence of the stages, you can move stages up or down in the hierarchy by clicking on **Up** or **Down** next to the stage you'd like to move:

Manage stages		
Stage code	Stage description	Action
00.000	The very first stage	Edit Delete Down
00.00	Preliminary stage	Edit Delete Up Down
00.20	Proposal for new project received	Edit Delete Up Down
00.60	Proposal for new project under review	Edit Delete Up Down
00.98	Close of review	Edit Delete Up Down

The stage list will immediately refresh to show the new order after you have moved a stage up or down in the hierarchy.

10 Helpdesk and Info

For further questions and assistance for the National Project Portal and other ISO IT applications, please contact the ISO helpdesk helpdesk@iso.org.

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

More information about the National Project Portal and other ISO applications can be found at: www.iso.org/eservices