IEC COLLABORATION PLATFORM

User guide

Abstract

A step by step guide to using the new IEC Collaboration Platform

Version 1 (2018-05-03)

For support contact

helpdesk@iec.ch

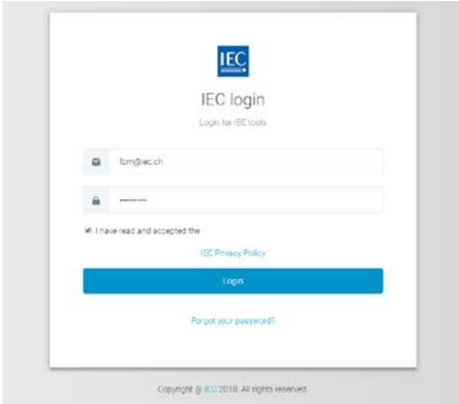
Table of Contents

IEC SSO Login

The new IEC Collaboration platform features SSO (single sign-on).

Sign in with your email address* and password registered in the IEC Expert Management System.
**Your EMS login will also allow you to sign in.*

Check the tick box to indicate that you have read and accepted the IEC Privacy Policy.



My Dashboard

Business Groups *(ex: IEC, CENELEC, BEC, etc.)*

The boxes you see will depend on your roles and permissions as defined in the IEC Experts Management System (EMS). Each box provides access to the workspaces of a business group to which you have access rights.

My Workspaces *(ex: TC, SC, WG, PT, MT etc.)*

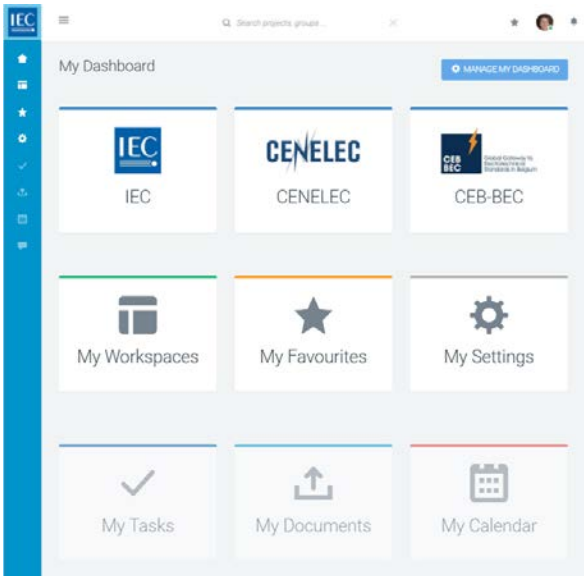
A list of all workspaces to which you have access, across all business groups.

My Favourites

When you favourite a **workspace** it will be listed here. Build your list of quick links of Workspaces you work with frequently

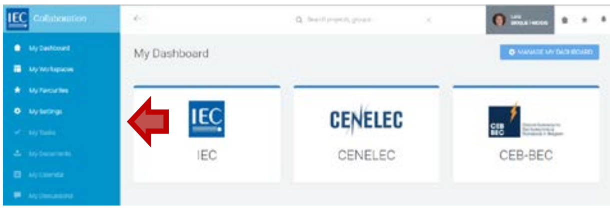
My Settings

Change your profile picture, manage which boxes appear on your dashboard, control your weekly notification subscriptions and see your activity.



Sidebar

All Dashboard boxes are always accessible via the sidebar



Top bar

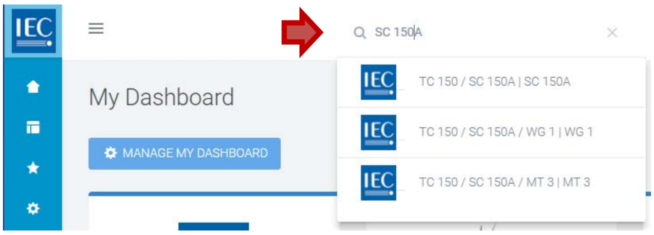
In the top bar you will find:

1. **Search** *(currently for workspaces only)*
2. **Your profile** *(access your settings and logout)*
3. **Home** | **Favourites** | **Notifications** shortcuts

Find a WORKSPACE

Top bar search

If you know exactly the name of the workspace you need to access, type it in the top bar search.
(currently for workspaces only)



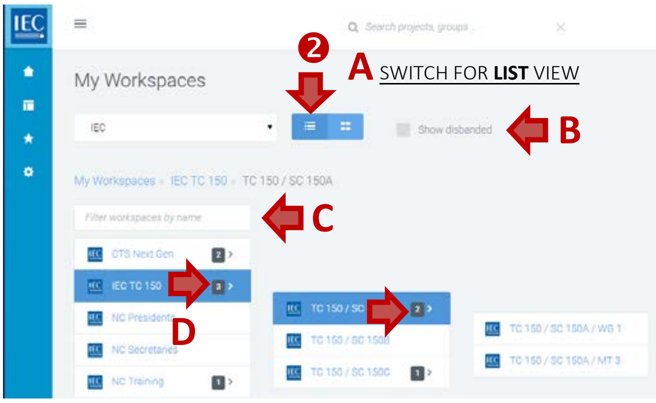
Drilldown method

1. Business Group *(example: IEC)*
Click on a business group to see the list of workspaces in the group to which you have access

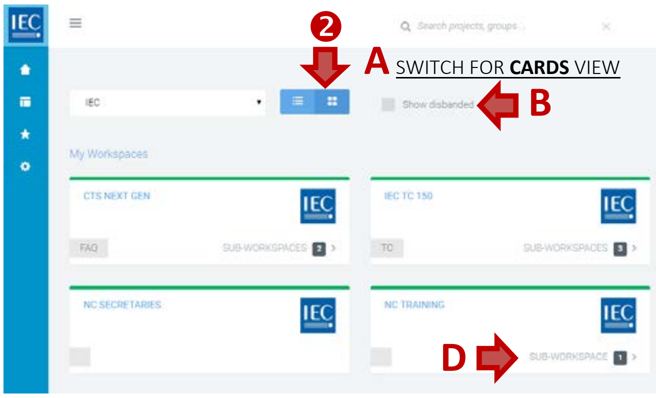
2. My Workspaces
In the list of Workspaces for a business group you can:

- **A.** Switch views: **LIST** | **CARDS** *(optional)*
- **B.** Click **check box** to **show disbanded** workspaces *(optional)*
- **C.** **Filter** list *(only available in list view)*
- **D.** **Drilldown** to sub-workspaces
  A counter indicates the number of sub-workspaces available. Click on ***right pointing arrows*** next to the ***counter*** in either the list or cards view to drilldown to sub-workspaces.

LIST view



CARDS view

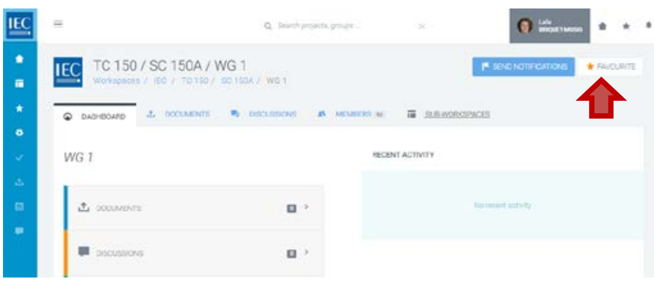


Favourite a WORKSPACE

Once you have located a **workspace**, click on the **Favourite button** to add it to your quick links.

Click button to add to your favourites

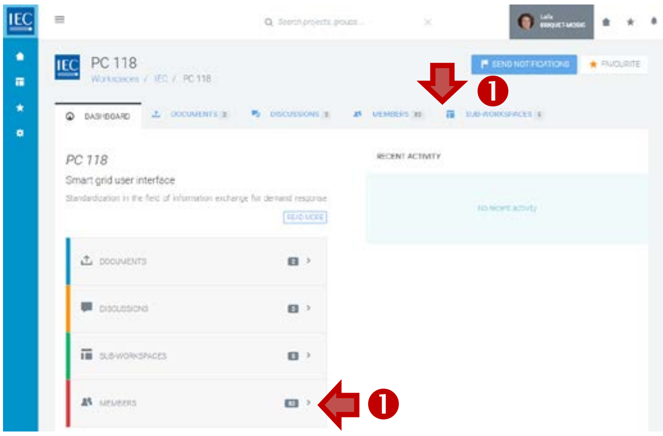
Yellow star *indicates a Favourited workspace*



View SUB-WORKSPACES of a workspace

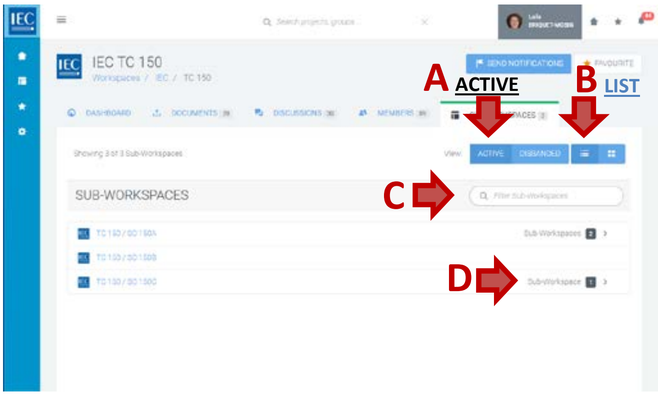
To access the **sub-workspaces** of a **workspace** you are working in…

1. Click on the **Sub-workspaces tab** or **Sub-workspaces box.**
   A counter displays how many sub-workspaces are available.

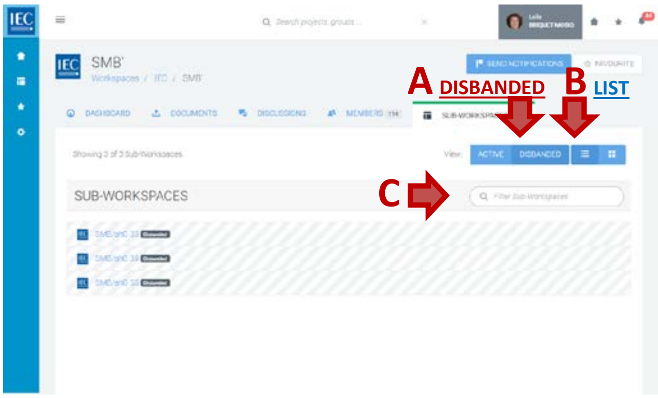


2. In the **Sub-Workspaces** tab of a workspace you can:
   - **A.** Switch views: **ACTIVE** | **DISBANDED** *(optional)*
   - **B.** Switch views: **LIST** | **CARDS** *(optional)*
   - **C.** **Filter** list
   - **D.** **Drilldown** to sub-workspaces
     A counter indicates the number of sub-workspaces available. Click on right pointing arrows next to the counter in either the list or cards view to drilldown to sub-workspaces.

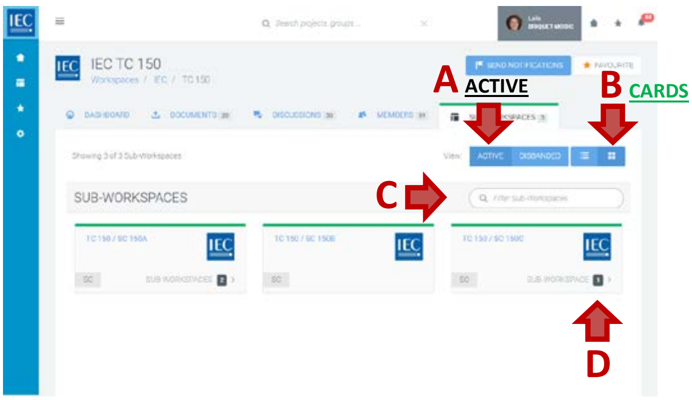
LIST view - **ACTIVE**



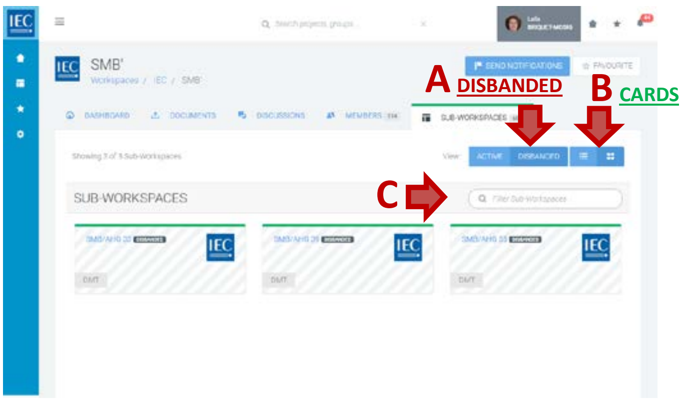
LIST view - **DISBANDED**



CARDS view - **ACTIVE**



CARDS view - **DISBANDED**

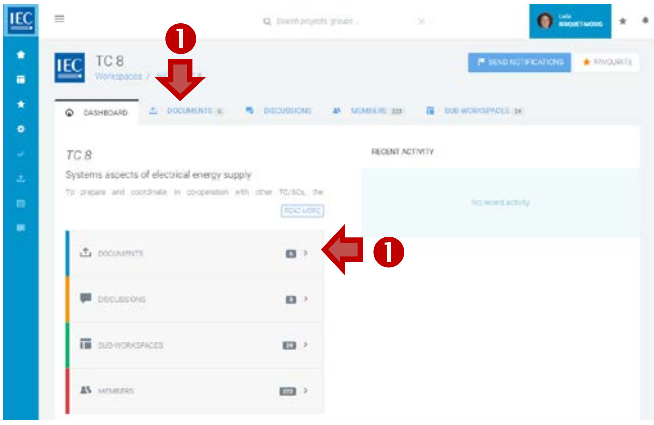


Find a DOCUMENT

Once you have located the **workspace** which contains the documents you need…

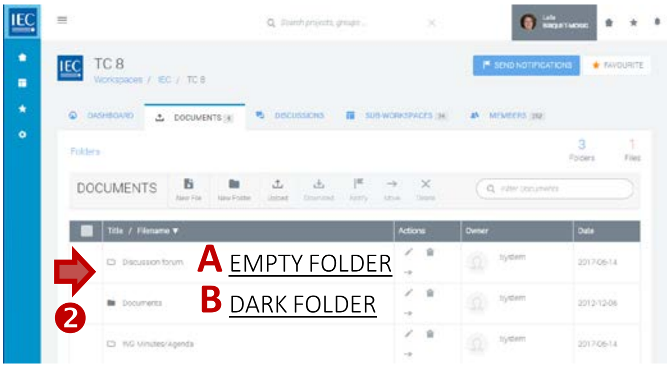
1. Click on the **Documents tab** or **Documents box**.

*A **counter** displays how many documents are available.*



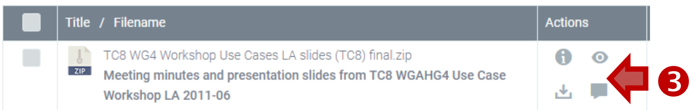
2. Click on **folders** to drilldown to the folder which the document

	A. EMPTY folder *(no content)*
	B. DARK folder *(contains files/folders)*



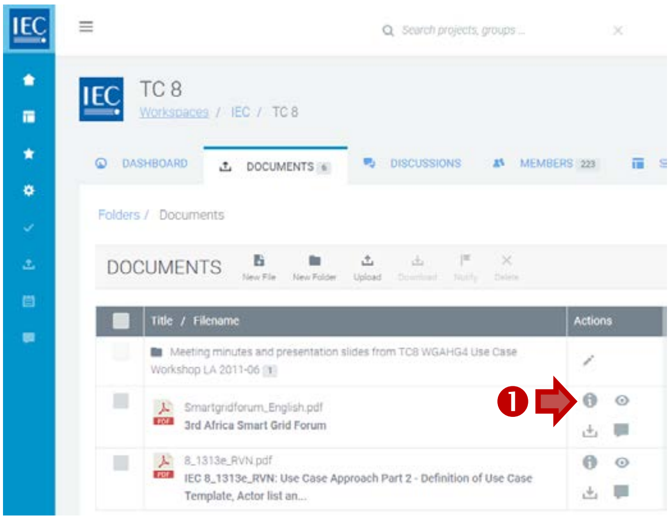
3. Click the **Action icons** next to the file to:

	A. View **file info** (details panel)
	B. Preview file
	C. Download file
	D. View/start file **discussion(s)**



View DOCUMENT DETAILS

Locate the **workspace** and the **folder** which contains the document(s) you want to download.



1. Click on the **Info icon** in the actions column next to the file you want to discuss.

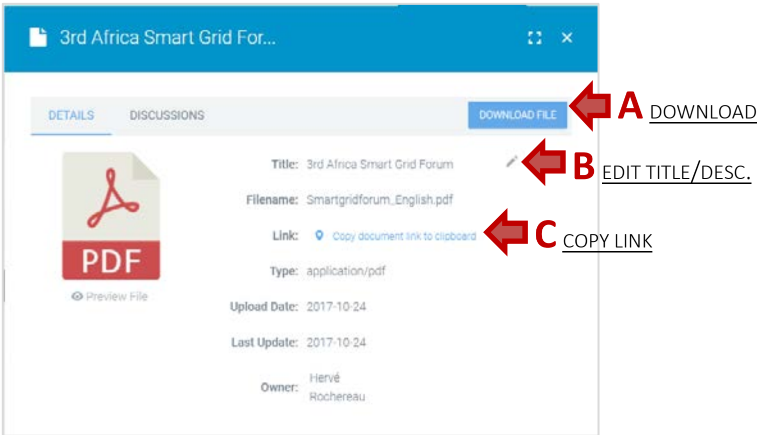
ⓘ	View **file info** (details panel)

2. In the **Document details panel** you can:

   A. **Download** file

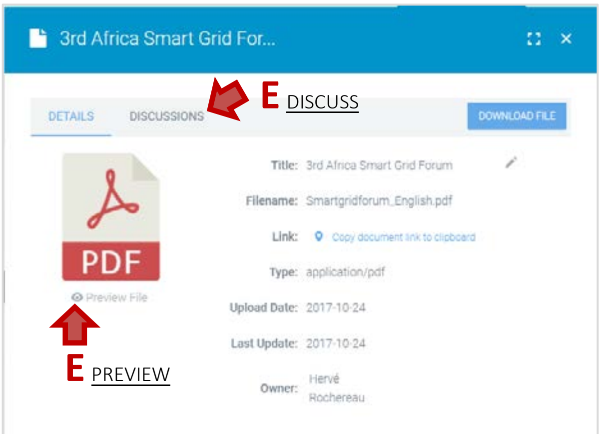
   B. **Edit** the document title and description *(owner and editors only)*

   C. **Copy document details** link to clipboard *(allows you to give a direct link to a document)*



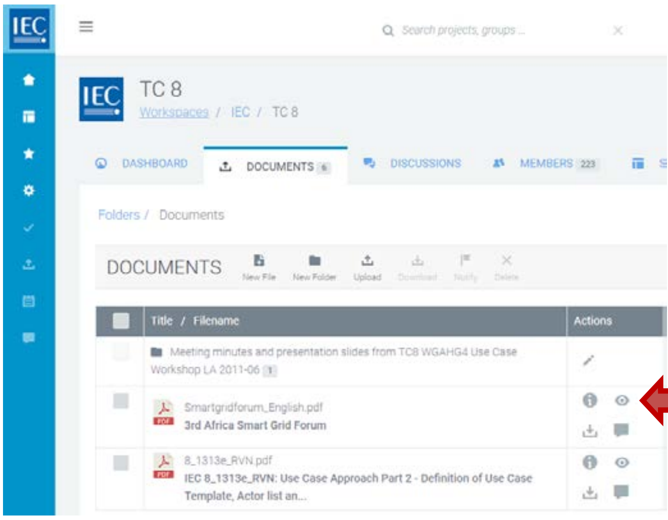
   D. View/start **document discussions**

   E. **Preview** file



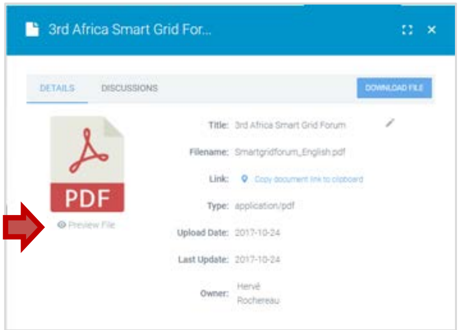
Preview a DOCUMENT

Locate the **workspace** and the **folder** which contains the document(s) you want to download.



1. Click on the **Preview icon** in the actions column next to the file you want to discuss.

	Preview file



*You can also preview a file from the file details panel… by clicking on the **Preview File link***

2. A **modal window** will open with a **preview** of the document.

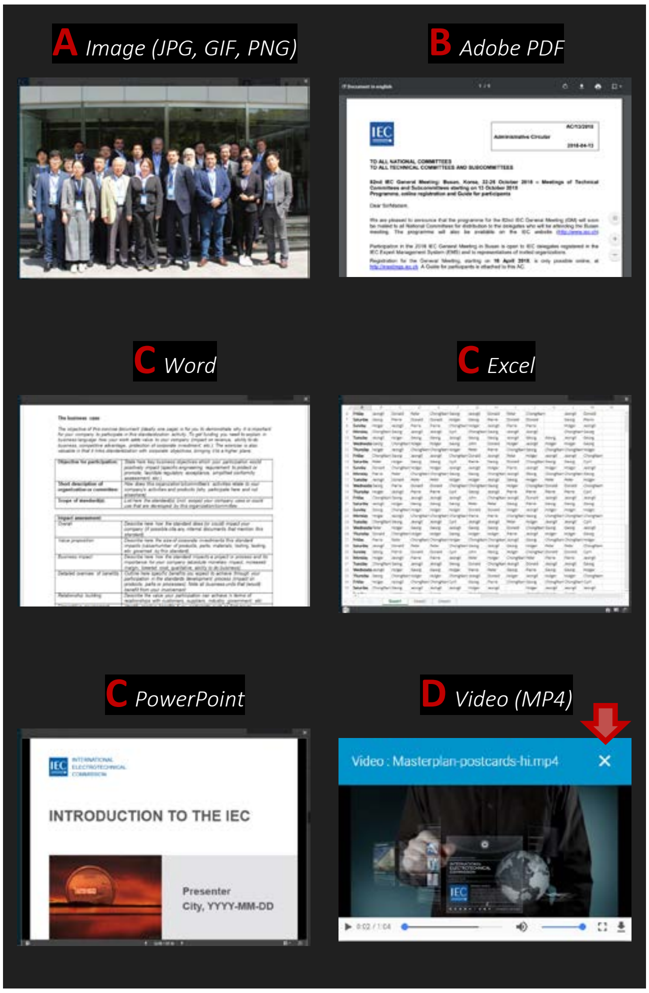
   Previews are available for:

   A. **Images files** (JPG, GIF, PNG)

   B. **Adobe PDF** documents

   C. **Microsoft Office** documents (Word, Excel and PowerPoint)

   D. **Video** files (MP4)



3. Click on the "**X**" to close the modal window.

Discuss a DOCUMENT

Locate the **workspace** and the **folder** which contains the document you want to discuss.

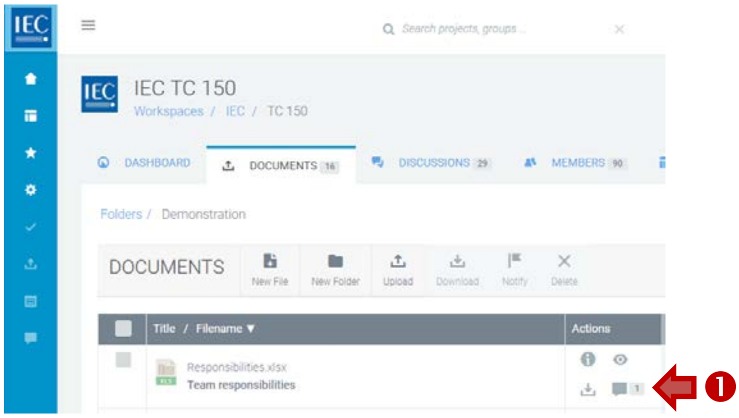
***Document discussions** allow you to discuss questions about a **specific document**.*

*If you want to start a discussion concerning **several documents**, please go to the **Discussions tab**, start a general discussion and attach multiple documents.*

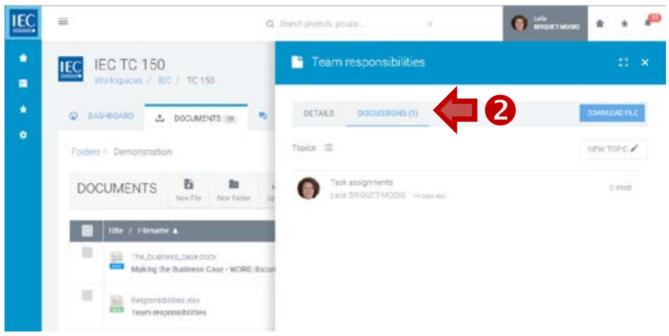
1. Click on the **Discussion icon** in the actions column next to the file you want to discuss.

1	File **Discussion(s)**

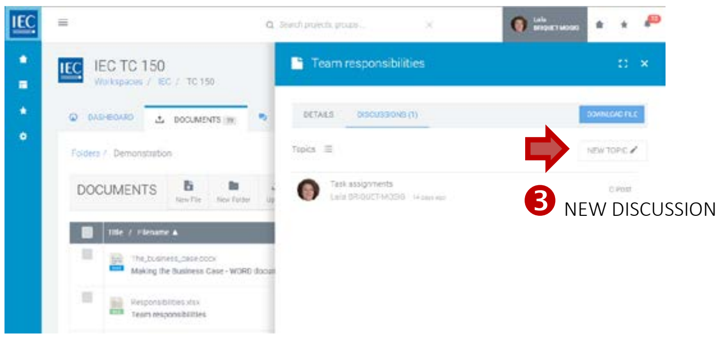
*A **counter** indicates if a document has discussions.*



2. The **document details** panel will open on the **DISCUSSIONS tab**



3. To start a **NEW discussion**, click on the **New Topic** button.

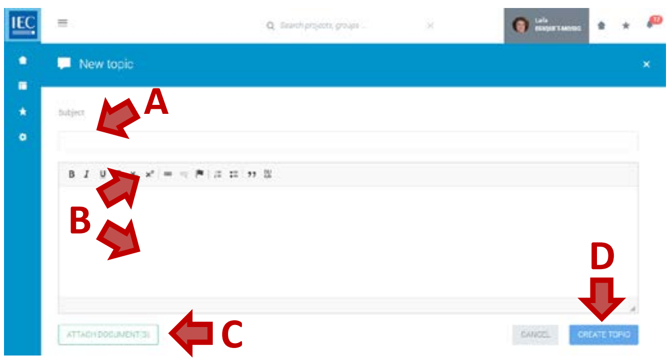


A. Enter a topic **subject** *(required)*

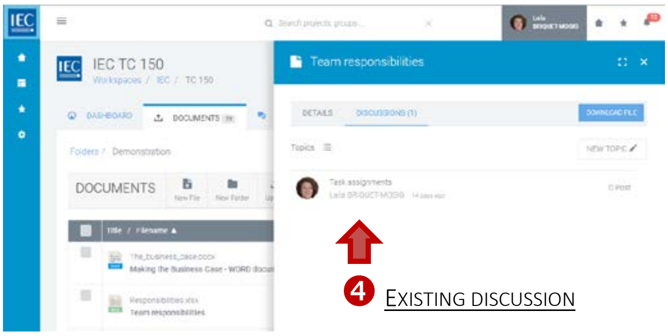
B. Enter a **description** *(required)* *(use html formatting as appropriate).*

C. **Attach documents** *(optional)* See: [Attach DOCUMENTS (to Discussions or Notifications)]

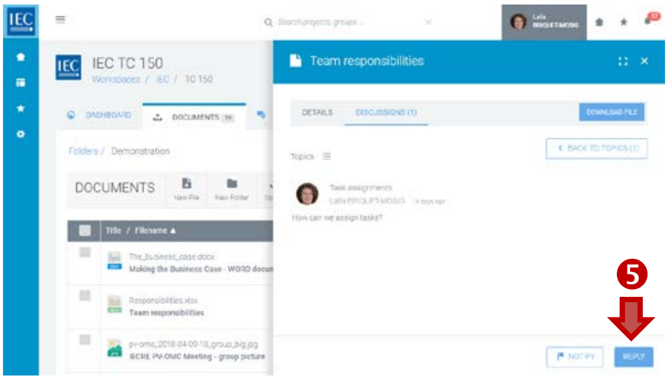
D. Press the **Create Topic** button.



4. To participate in an **EXISTING discussion**, click on a **topic** in the list.



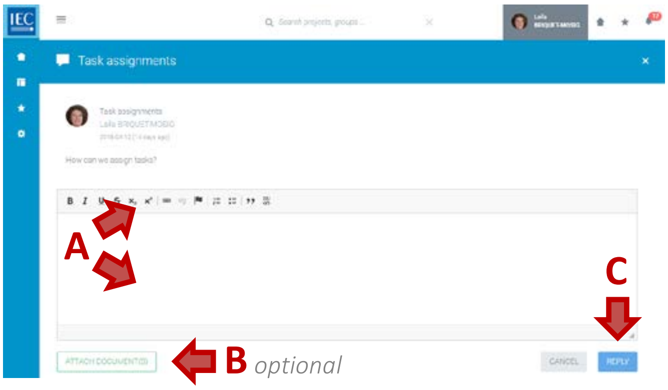
5. Press the **reply** button



A. Enter your **response** *(required)*
(use html formatting as appropriate).

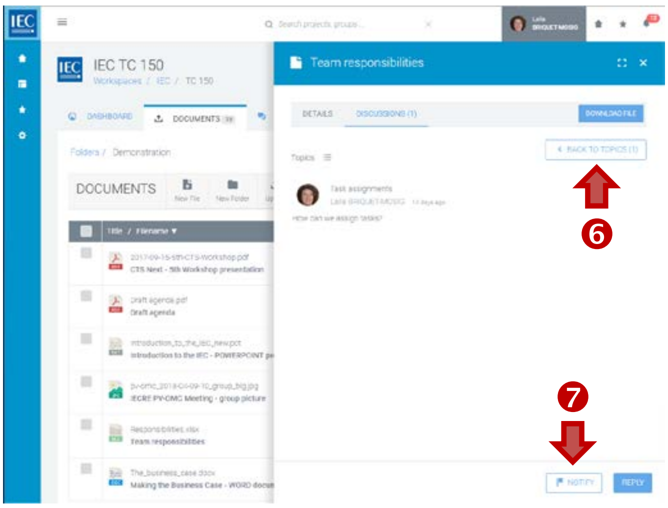
B. **Attach documents** *(optional)*
See: [Attach DOCUMENTS (to Discussions or Notifications)]

C. Press the **reply** button



6. Press the **back to topics** button to return to the list of topics.

7. Press the **Notify** button to send notifications *(optional)*

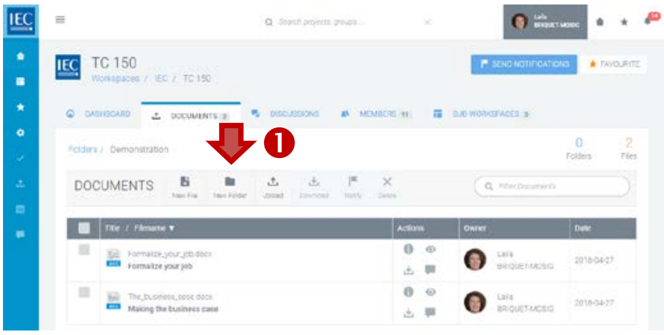


Create a DOCUMENT FOLDER

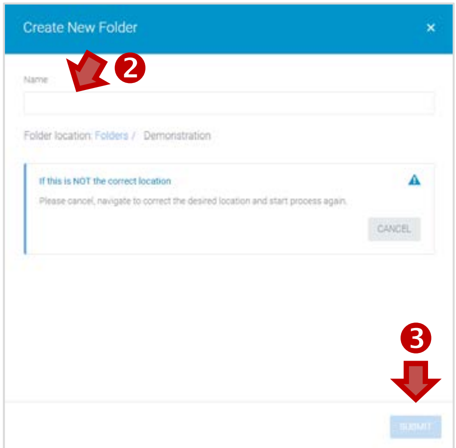
Locate the **workspace** and the **folder** where you would like to create a **new folder**.

See: [Find a WORKSPACE]

1. In the toolbar press the **New Folder** button.



2. Enter a **folder name**.

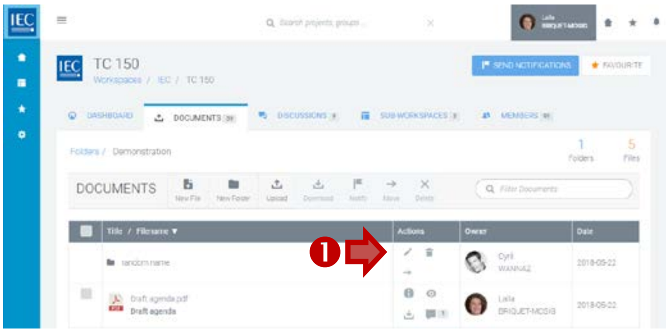


3. Press the **Submit** button.

Rename a DOCUMENT FOLDER

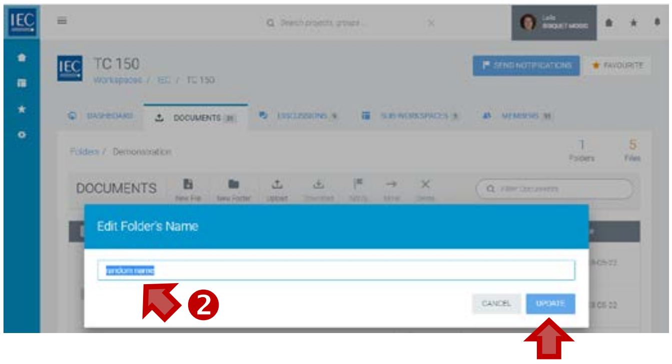
Locate the **workspace** and the **folder** which you would like to **rename**. See: [Find a WORKSPACE]

***NOTE:** Only owners and editors can rename folders.*



1. Click on the **Edit folder name icon** in the actions column next to the folder you want to rename.

	Edit folder name



2. Enter the **new folder name**.

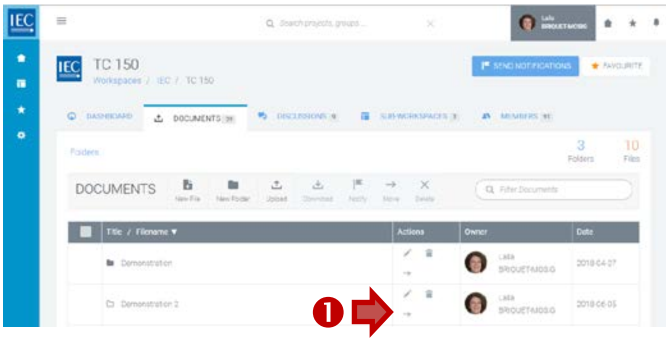
3. Press the **Update** button.

Move a DOCUMENT FOLDER

Locate the **workspace** and the **folder** which you would like to **move**.

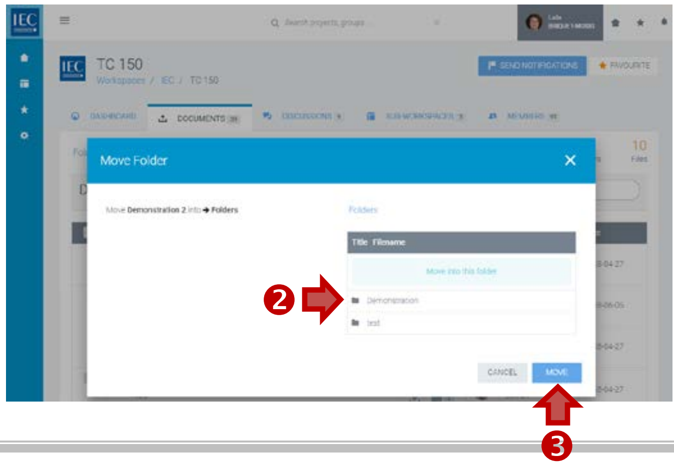
See: [Find a WORKSPACE]

***NOTE:** Only owners and editors can move folders.*



1. Click on the **Move folder icon** in the actions column next to the folder you want to move.

→	**Move folder**



2. Drilldown in the list of folders on the right until you are inside of the **destination folder**.

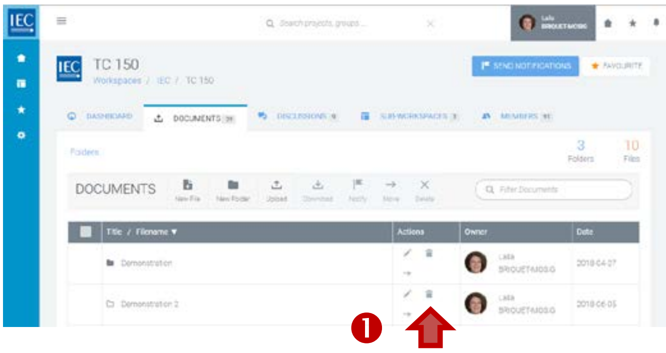
3. Press the **Move** button.

Delete a DOCUMENT FOLDER

Locate the **workspace** and the **folder** which you would like to **delete**.

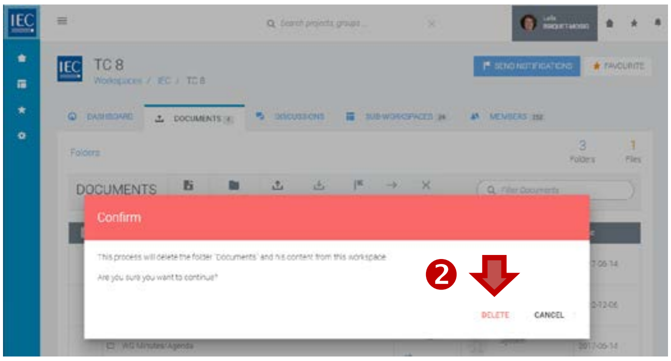
See: [Find a WORKSPACE]

***NOTE:** Only owners and editors can delete folders.*



1. Click on the **Delete folder icon** in the actions column next to the folder you want to move.

🗑	**Delete folder**

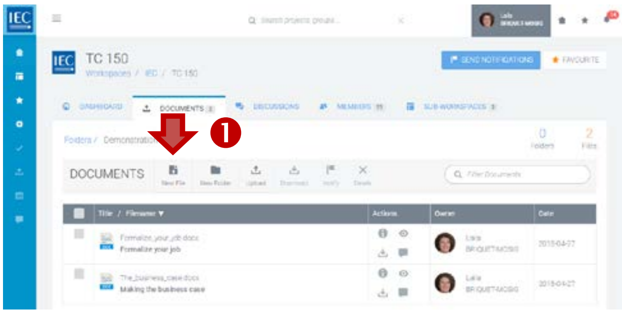


2. To confirm the deletion of the folder in the alert window, press the **Delete** button.

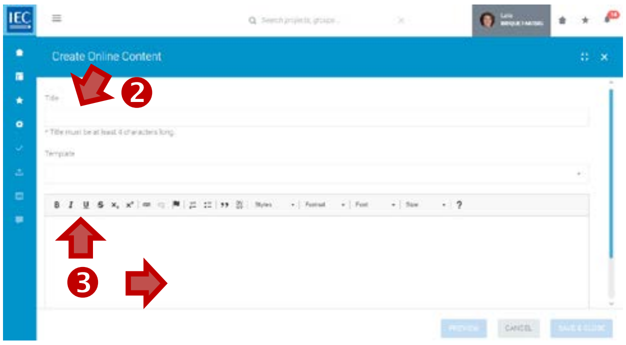
Create a NEW DOCUMENT (online file)

Locate the **workspace** and the **folder** where you would like to create a **new file**.

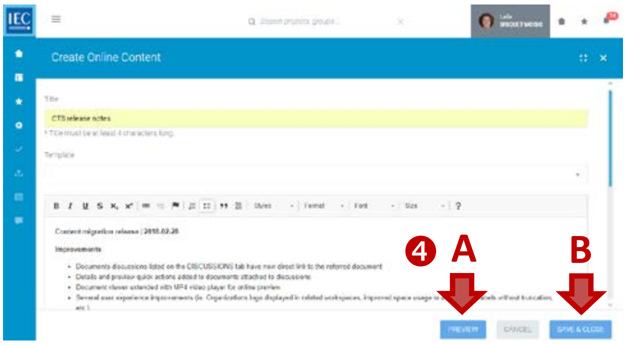
1. In the toolbar press the **New File** button.



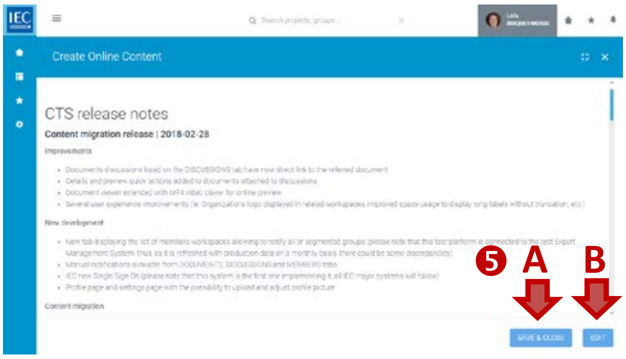
2. Enter a **title**.



3. Enter **body text**
   (use html formatting as appropriate).



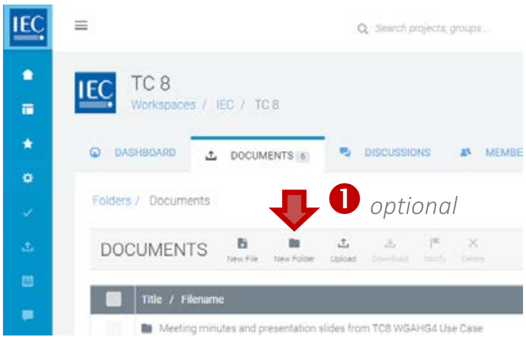
4. In the **EDIT mode**...
   - **A.** Press the **Preview** button to see how your online content will look.
   - **B.** Press the **Save & Close** button if you are ready to save your work.



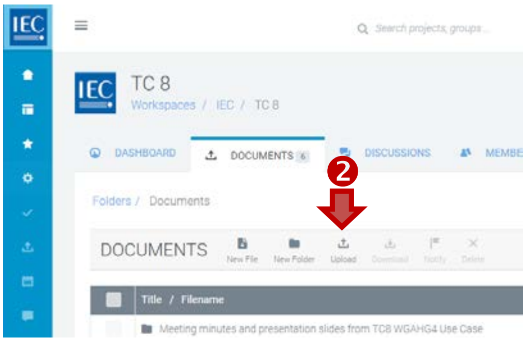
5. In the **PREVIEW mode**...
   - **A.** Press the **Save & Close** button if you are satisfied and ready to save your work.
   - **B.** Press the **Edit** button to continue working on the document.

Upload a DOCUMENT(S)

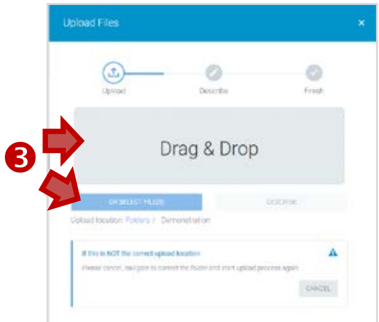
1. Locate the **workspace** and the **folder** where the document should be stored.
   - *Click on folders to drill down to subfolders*
   - *Optional:*
     Click on **New Folder** *button to create a folder*



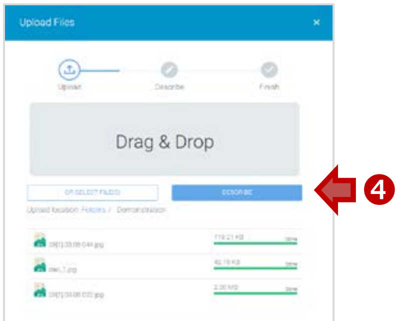
2. In the toolbar press the **Upload** button.



3. **Drag & Drop** or **browse to select file(s)** to upload.



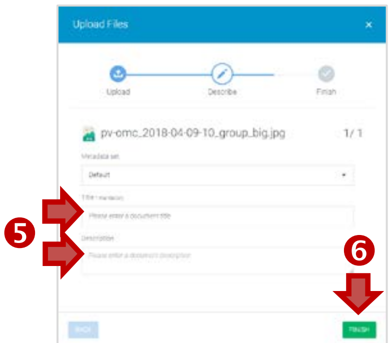
4. Once files are processed…
   press the **Describe button** to collect metadata for each file.



5. Enter a **title** *(required)*
   and a **description** *(optional)*

   Press ***Next*** *to enter metadata for additional files*

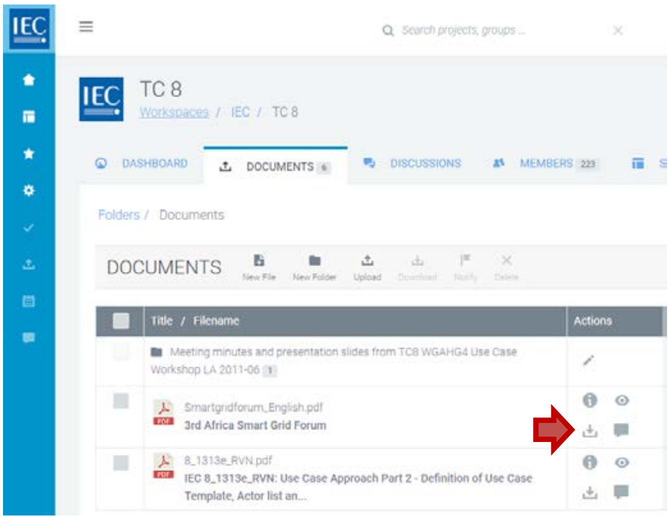
6. Press **Finish** after entering metadata for all files



7. **Notify** members *(optional)*
   At the end of the upload process you have the possibility to send a Notification.

Download a DOCUMENT(S)

Locate the **workspace** and the **folder** which contains the document(s) you want to download.

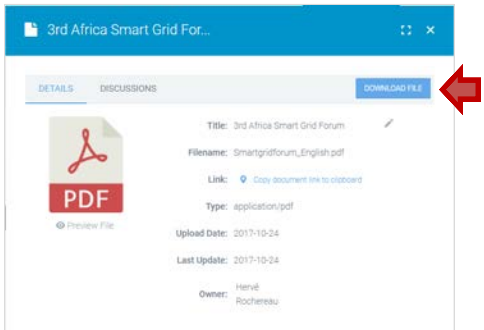


Single file downloads

Click on the Download icon in the actions column next to the file you want to download.

Download file

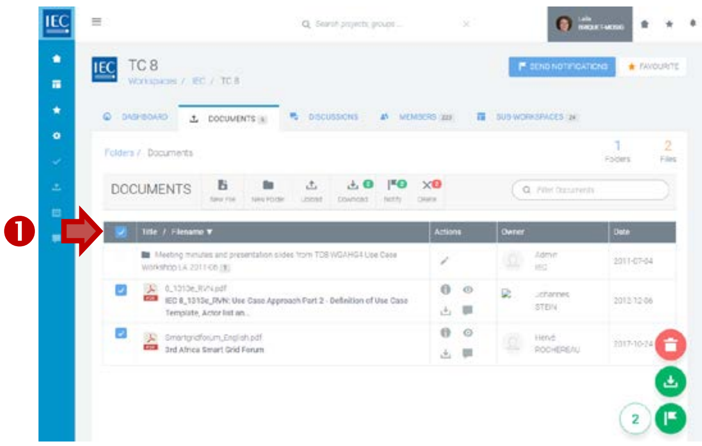
*You can also download a file from the file details panel… with the **Download File** button*



Multiple file downloads

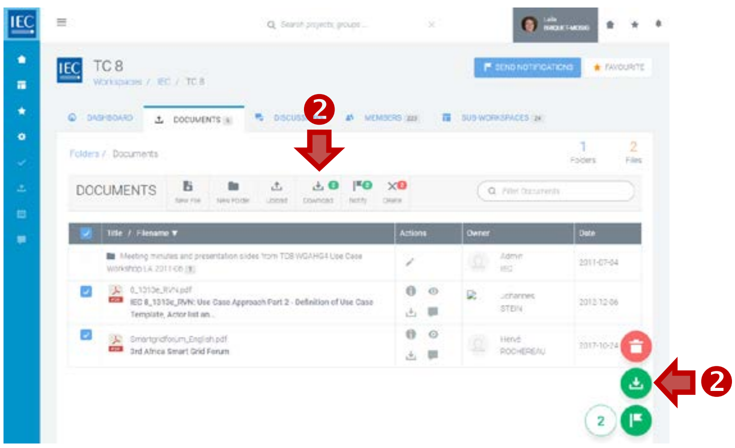
1. Click on the **checkbox** next to the file you want to download.

   *Click the checkbox in the table header to select all files in a folder. Note: **Subfolders will not be included.***



2. In the toolbar press the **Download** button.

   *You can also use the **DOWNLOAD circle button (with notification download icon)** which will appear in the bottom right of your screen.*



A **zip file** will be generated containing all the files you selected.

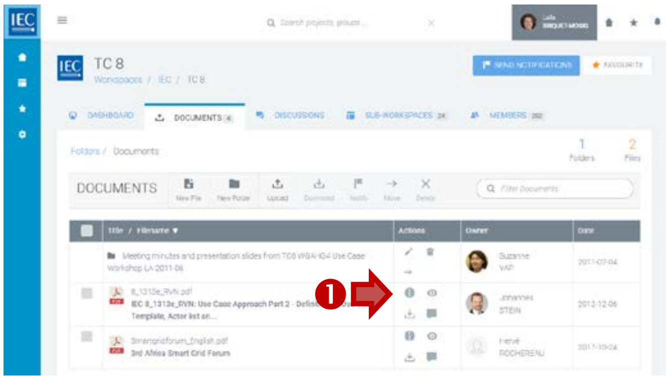
Edit a DOCUMENT title and/or description

Locate the **workspace** and the **folder** with the document title and/description you would like to **edit**.

***NOTE:** Only owners and editors can edit the title and/or description of a document. The filename itself cannot be changed.*

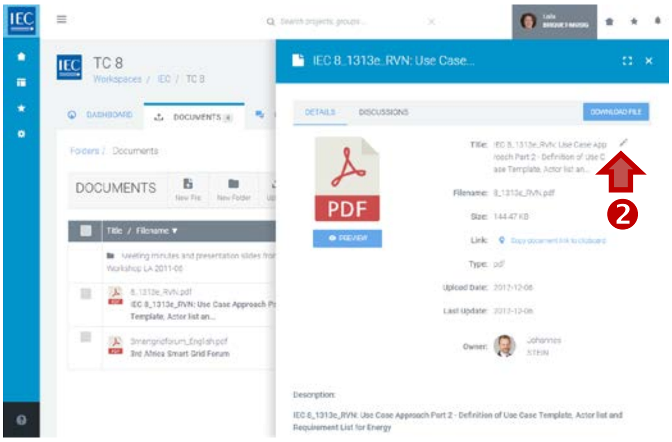
1. Click on the **Info icon** in the actions column next to the file with the title and/or description you want to edit.

	View **file info** (details panel)



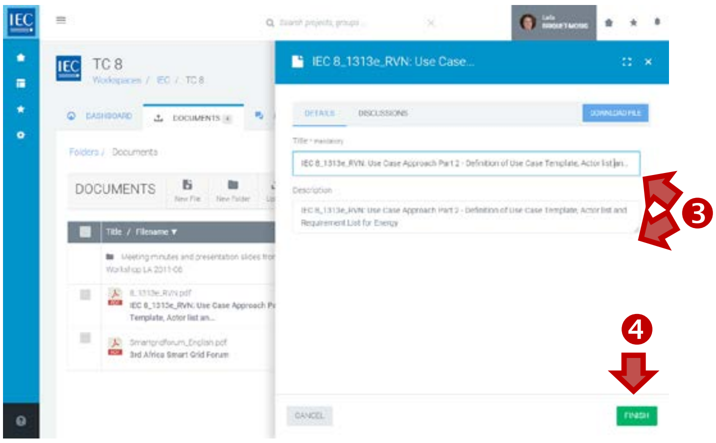
2. In the file details panel, click on the **Edit icon** next the title.

	Edit



3. Edit the **title** and/or the **description** as needed.

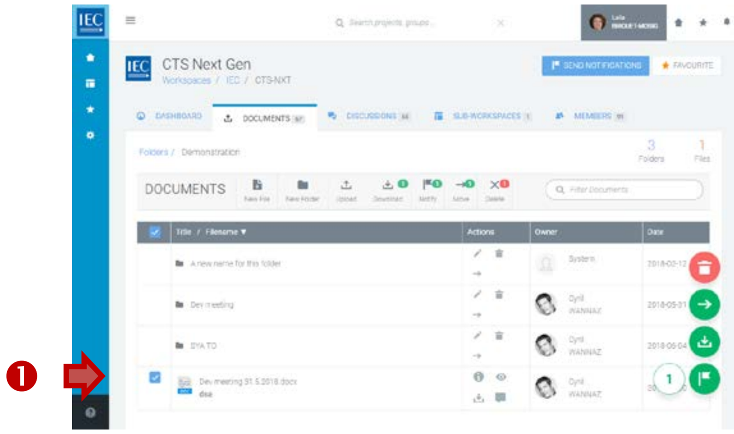
4. Press the **Finish** button.



Move a DOCUMENT(S)

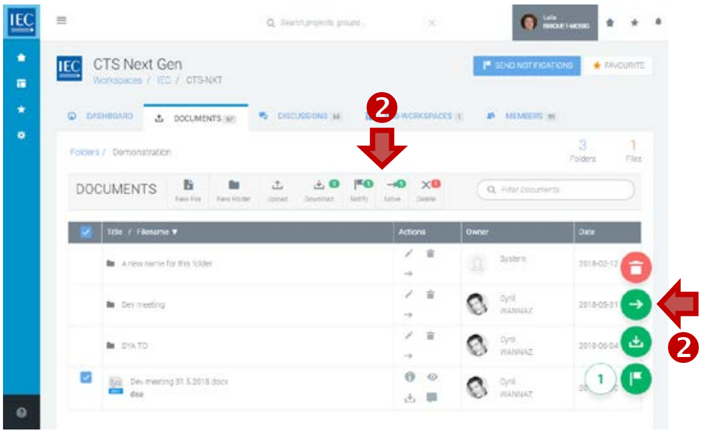
Locate the **workspace** and the **folder** with the document you would like to **move**.

NOTE:* *Only owners and editors can move documents.



1. Click on the **checkbox** next to the file(s) you want to move.

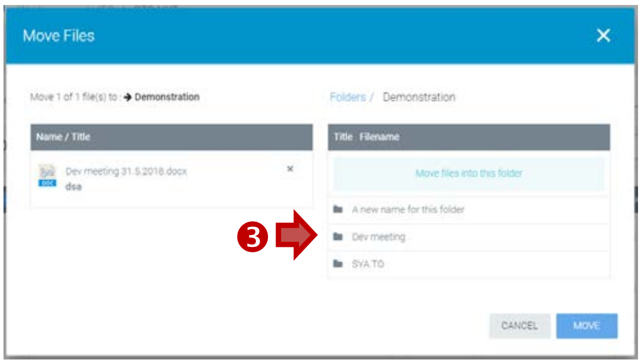
   Click the checkbox in the table header to select all files in a folder. Note: Subfolders will not be included.



2. In the toolbar press the **Move** button.

   You can also use the ***MOVE circle button (with a right pointing arrow icon)*** *which will appear in the bottom right of your screen.*

A FILES TO BE MOVED **B** FOLDER STRUCTURE

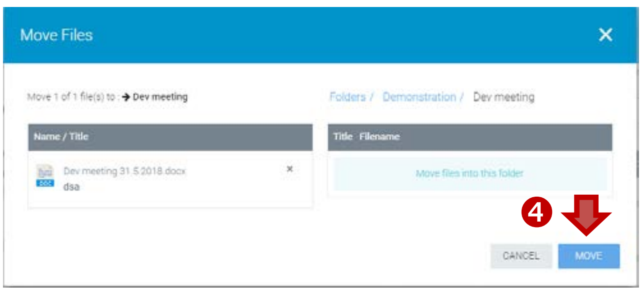


In the **Move Files window** you will see…

A. On the **left…** the files to be moved

B. On the **right…** the workspace folder structure.

3. **Click on folders to drilldown** to the destination folder where you would like to move the file(s).



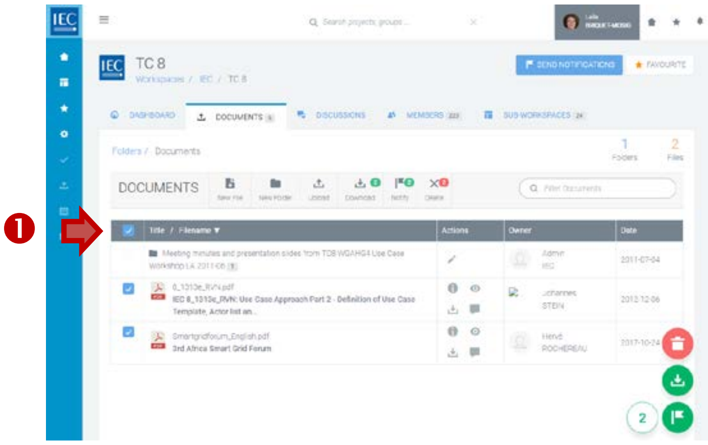
4. Once you have reached the destination folder click on the **Move** button.

Delete a DOCUMENT(S)

Locate the **workspace** and the **folder** which contains the document(s) you want to delete.

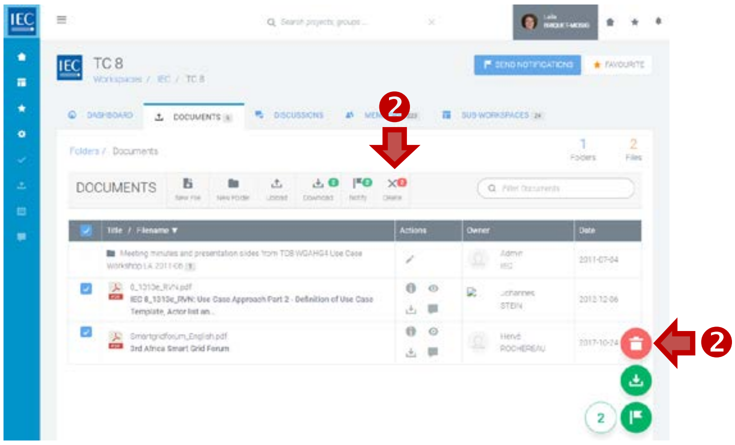
1. Click on the **checkbox** next to the file(s) you want to delete.

Click the checkbox in the table header to select all files in a folder. Note: Subfolders will not be included.



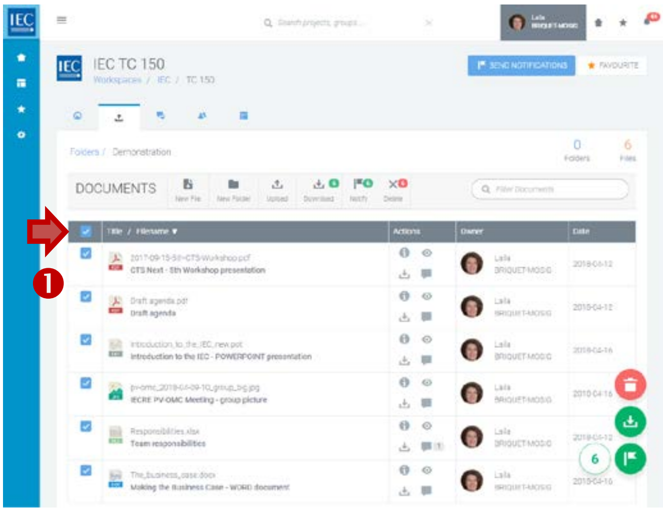
2. In the toolbar press the **Delete** button.
(owner and editors only)

*You can also use the **DELETE circle button (with trashcan icon)** which will appear in the bottom right of your screen.*



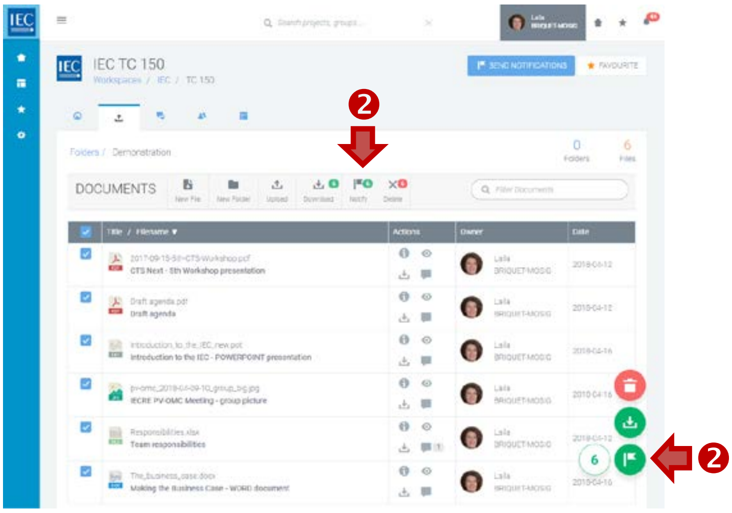
Send document NOTIFICATIONS

Locate the **workspace** and the **folder** with the document(s) you want to send a notification about.



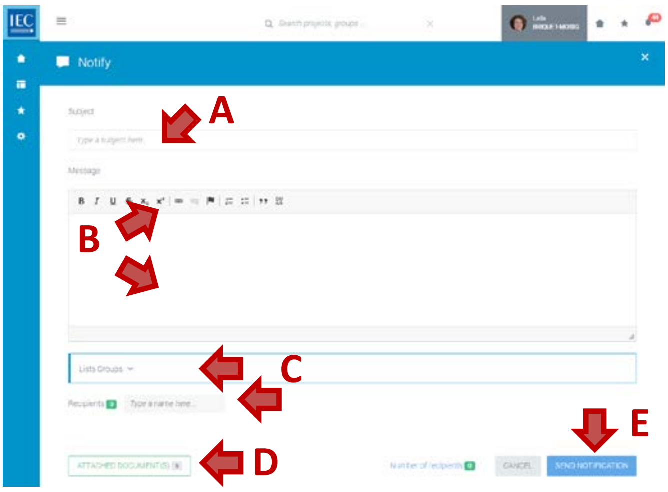
1. Click on the **checkbox** next to the file(s) you want to send a notification about.

   Click the checkbox in the table header to select all files in a folder. Note: Subfolders will not be included.



2. In the toolbar press the **Notify** button.

   *You can also use the **NOTIFY circle button (with notification flag icon)** which will appear in the bottom right of your screen.*



A. Enter a **subject** (required)

B. Enter a **body text** (required)
   (use html formatting as appropriate).

C. **Select a list group** (and/or type a name) to create a list of notification recipients.
   *(a **counter** shows the number of recipients).*

D. The documents you selected are **already attached.**
   *If needed, you can attach more documents using the **Attach Documents** button.*
   *(a **counter** shows the number of attachments).*

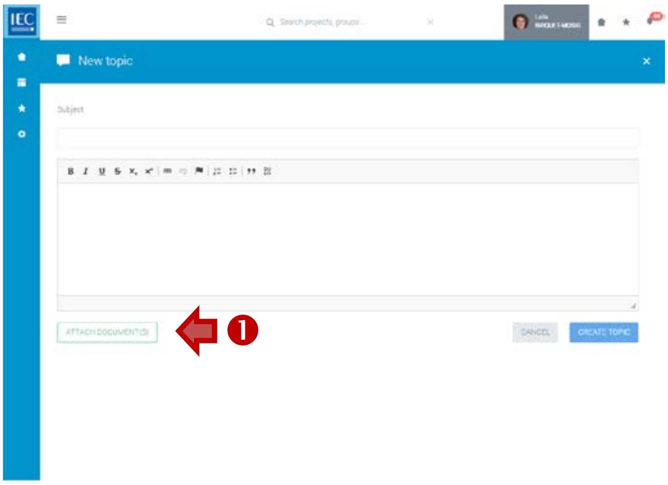
E. Press the **Send Notification** button
   *(a **counter** shows the number of recipients).*

Attach DOCUMENTS (to Discussions or Notifications)

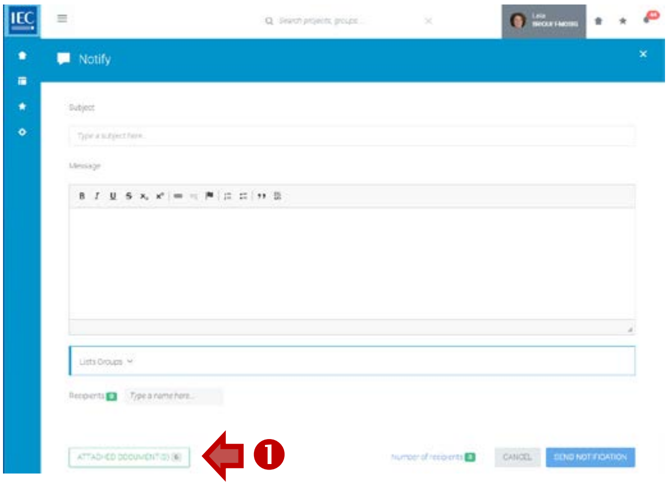
Documents can be attached to both Discussions and Notifications. In both cases the method is the same.

1. In either **Discussions** (new topic or reply) or **Notifications**…
click on the **Attach documents** button.

Discussions

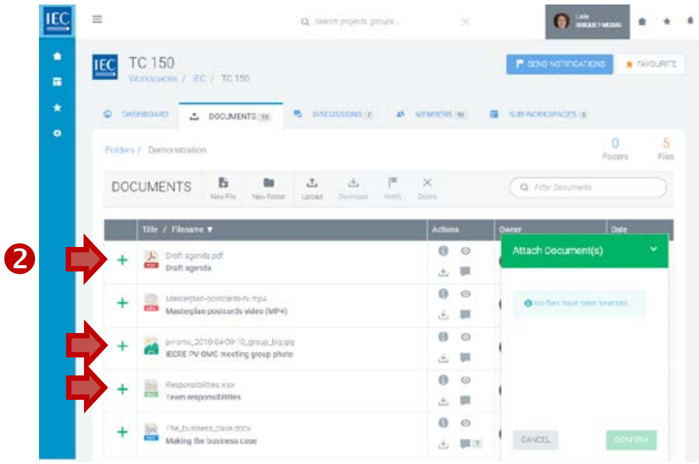


Notifications

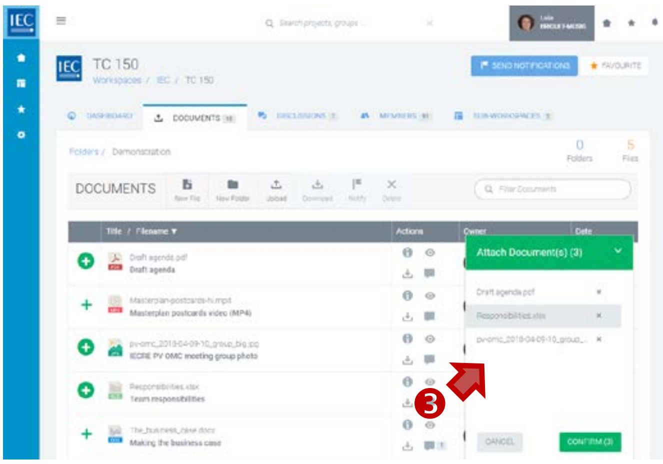


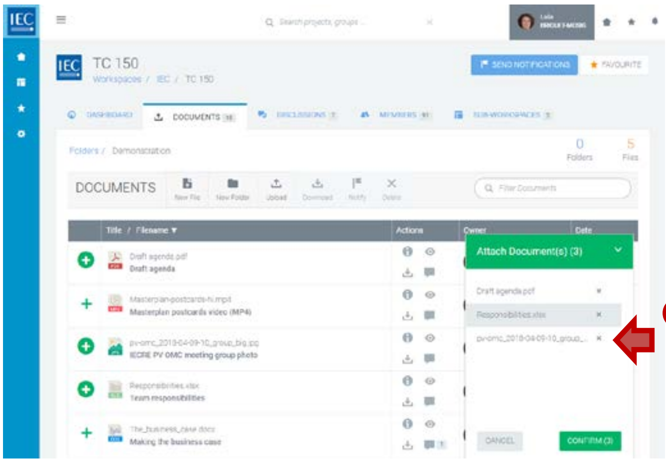
2. **Click** on the **green +** next to the documents you want **to attach**.

NOTE: You can add files from different folders by browsing through the file tree.

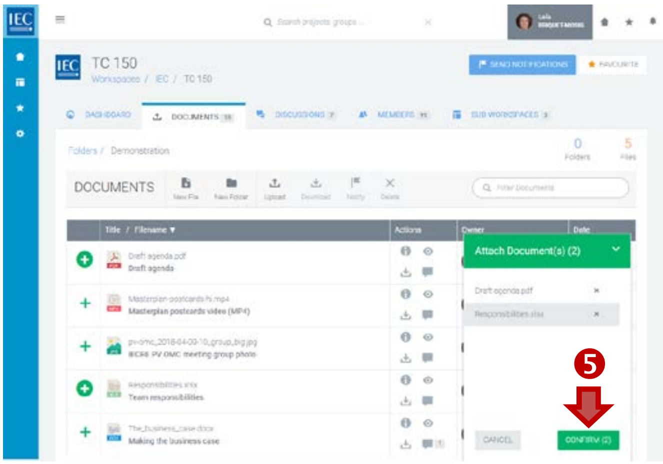


3. The files will be **added** to your **basket**.





4. To **REMOVE files** from the basket, click on "**x**" next to the files.



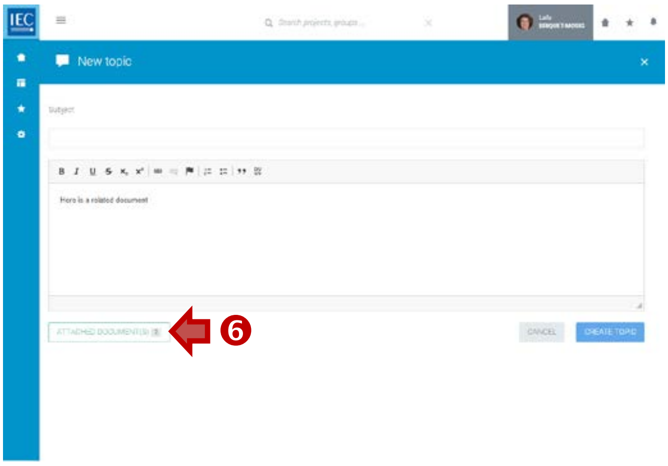
5. When finished press the **Confirm** button

*You will **return** to the **Discussion or Notification** to which you are attaching the files.*

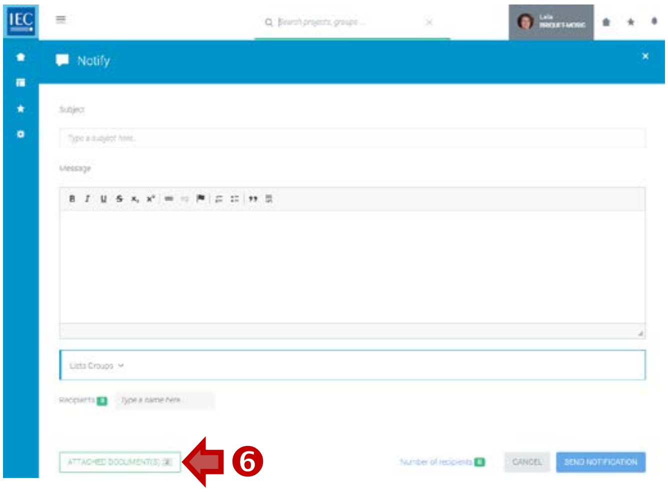
A counter on the Attach files button

6. A **counter** on the **Attach documents** button will indicate the number of files attached.

Discussions

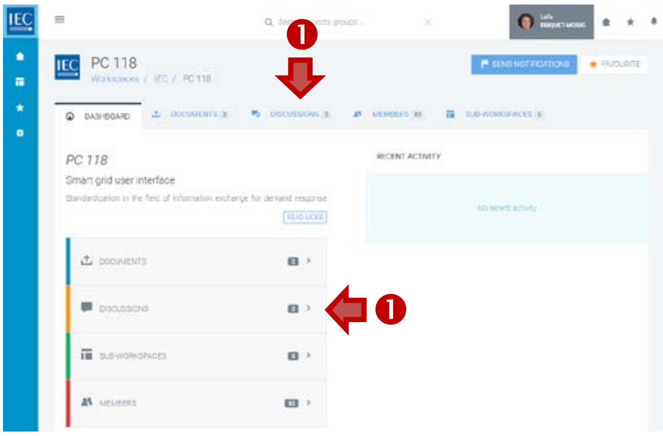


Notifications



Find a DISCUSSION

Locate the **workspace** which contains the **discussion** you want to find…



1. Click on the **Discussions tab** or **Discussions box**.
   A counter displays how many discussions are available.

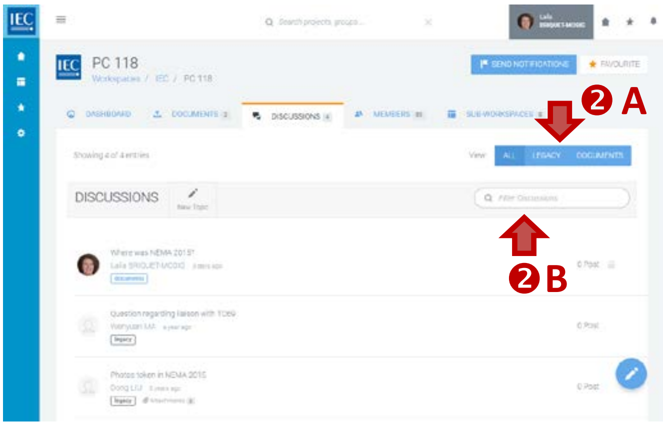
2. **Switch views** / **Filter** list of discussions

   In the list of discussions you can:

   A. Switch views: **ALL** | **LEGACY** | **DOCUMENTS**

   - Discussion migrated from the former CTS application are tagged as **LEGACY**.
   - Discussions created on a specific document are tagged as **DOCUMENTS**

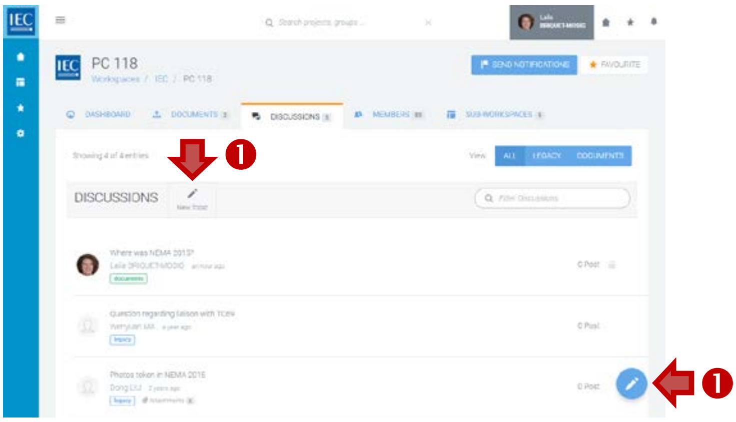
   B. **Filter** list *(search in forum title & contents)*



New topic for DISCUSSION

Locate the **workspace** where you want to create a discussion and click on the **discussion tab**…

1. In the toolbar press the **New Topic** button.
   *You can also use the **NEW TOPIC circle button (with pencil icon)** at the bottom right of your screen.*

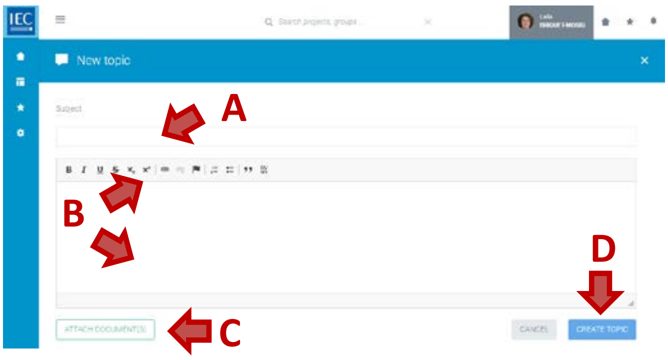


A. Enter a **subject** *(required)*
(use html formatting as appropriate).

B. Enter a **body text** *(required)*
(use html formatting as appropriate).

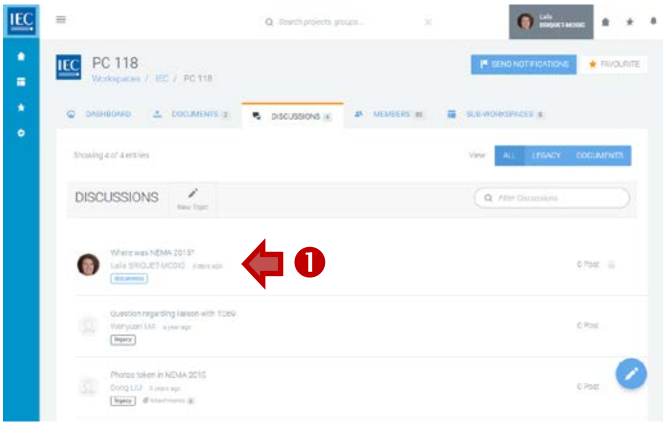
C. **Attach documents** *(optional)*
See: [Attach DOCUMENTS (to Discussions or Notifications)]

D. Press the **Create Topic** button

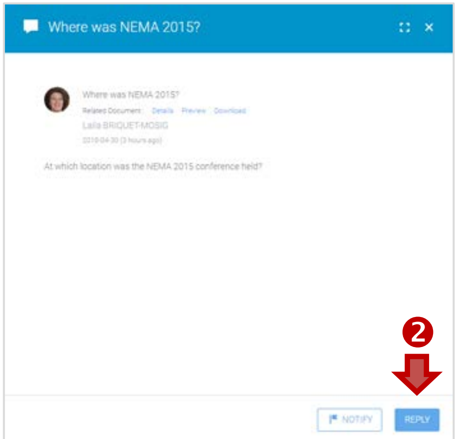


Reply to a DISCUSSION

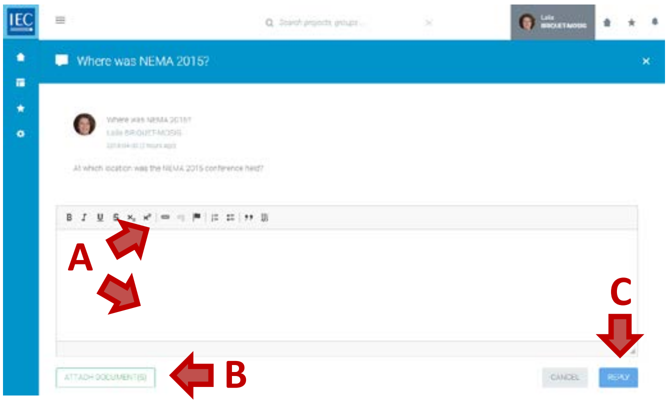
Locate the **workspace** with a discussion you want to participate in and click on the **discussion tab**...



1. Click on a **topic** in the list of **discussions**.



2. Click on the **Reply** button.



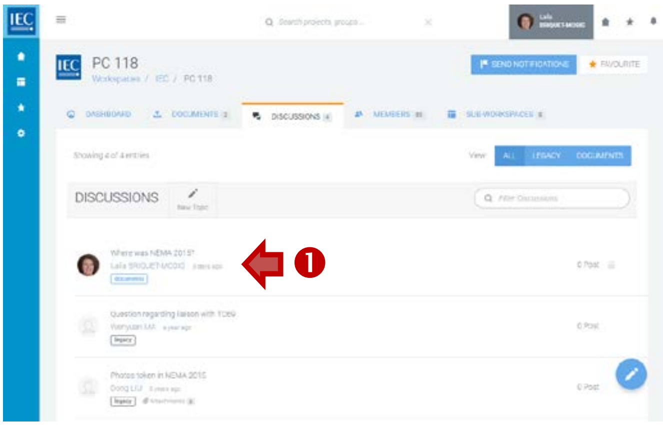
A. Enter a **body text** *(required)*
(use html formatting as appropriate).

B. **Attach documents** *(optional)*
See: [Attach DOCUMENTS (to Discussions or Notifications)]

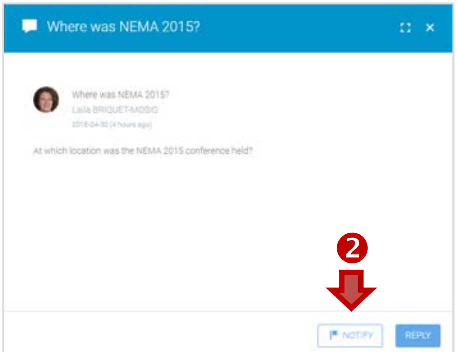
C. Press the **Reply** button.

Discussion NOTIFICATIONS

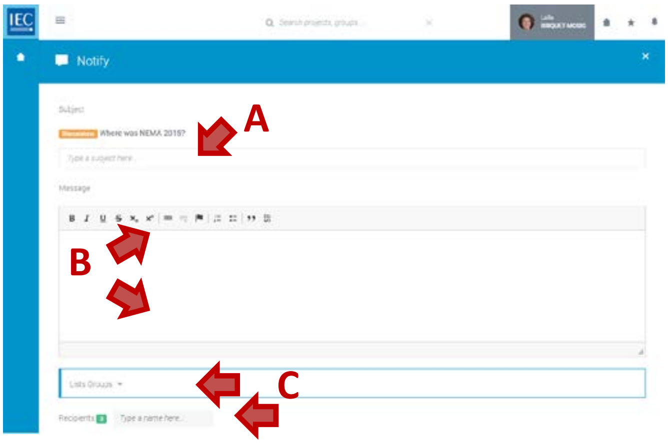
Locate the **workspace** with a discussion you want to send a notification about and click on the **discussion tab**...



1. Click on a **topic** in the list of **discussions**.



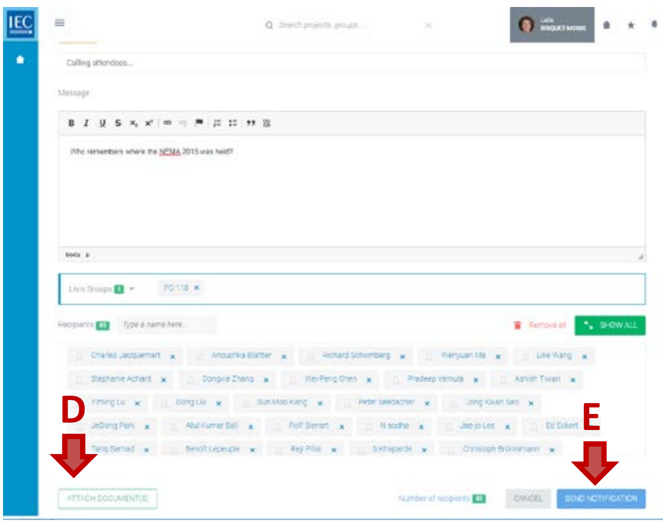
2. Click on the **Notify** button.



A. Enter a **subject** *(required)*

B. Enter a **body text** *(required)*
(use html formatting as appropriate).

C. **Select a list group** (and/or type a name) to create a list of notification recipients.

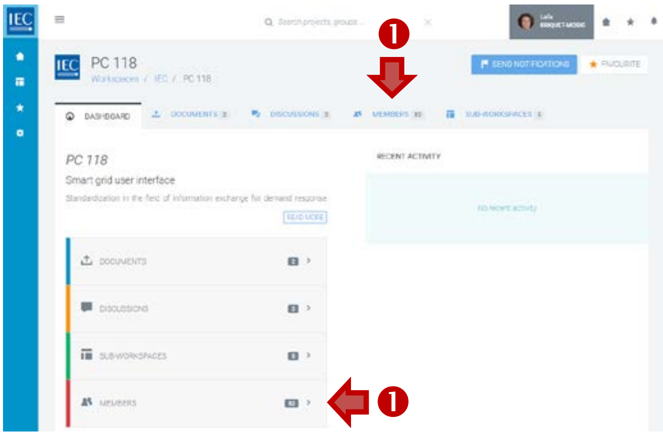


D. **Attach documents** *(optional)*
See: [Attach DOCUMENTS (to Discussions or Notifications)]

E. Press the **Send Notification** button.
(a ***counter*** *shows the number of recipients).*

Find a MEMBER(S)

Locate the **workspace** which contains the **member** you want to find…

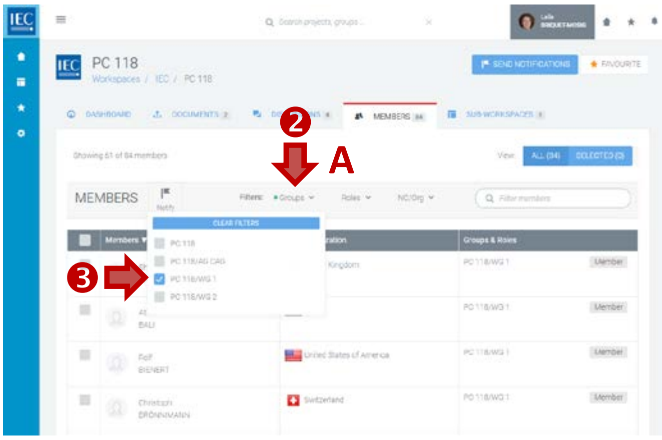


1. Click on the **Members tab** or **Members box.**
   A counter displays how many members are participating in the workspace and sub-workspaces.

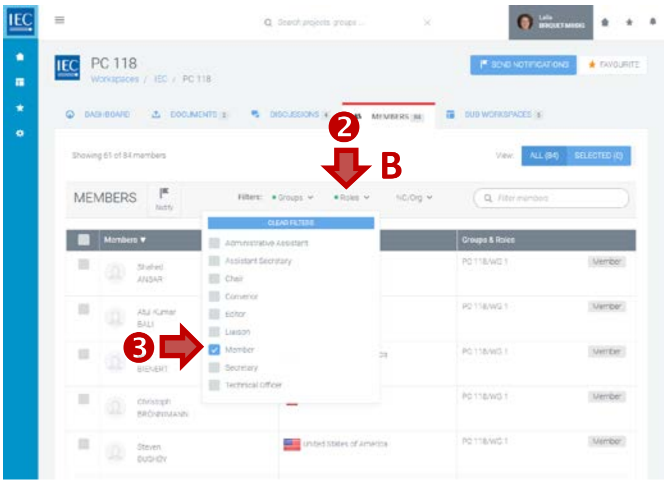
2. Use the **filters** in the **toolbar** to filter the list. You can filter the list of members by:
   - **A. Groups** filter
     (workspace or sub-workspaces)
   - **B. Roles** filter
     (Secretary, Chair, Convenor… etc.)
   - **C. NC/Org** filter
     (National Committee or Organization)

3. Click **checkboxes** next to filter items to apply

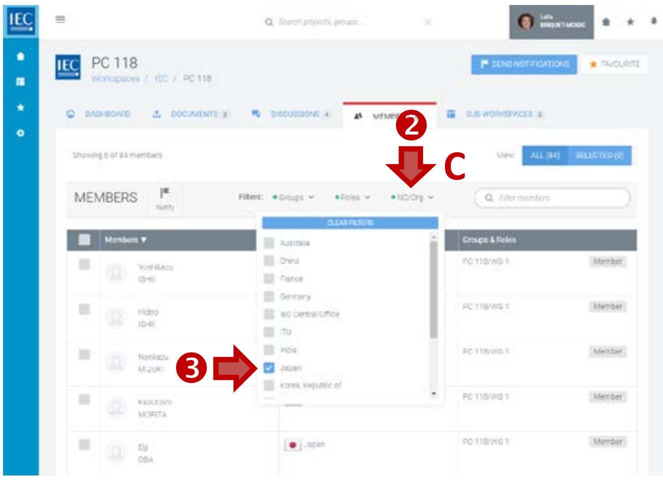
Group filter



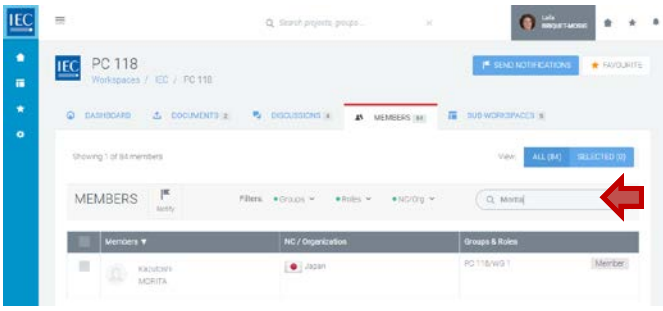
Roles filter



NC/Org filter

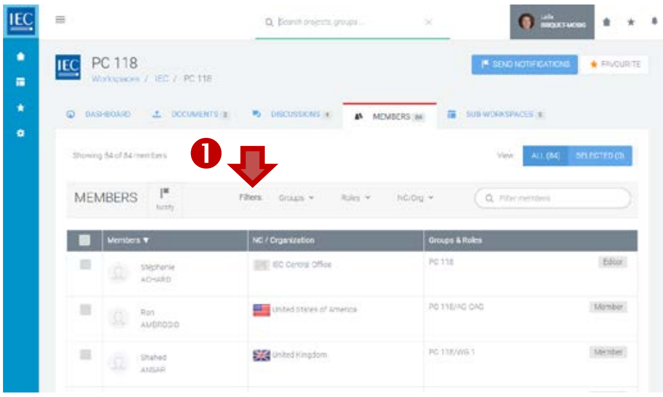


4. You can also **type a name** in the **search filter** to search directly for a specific person.

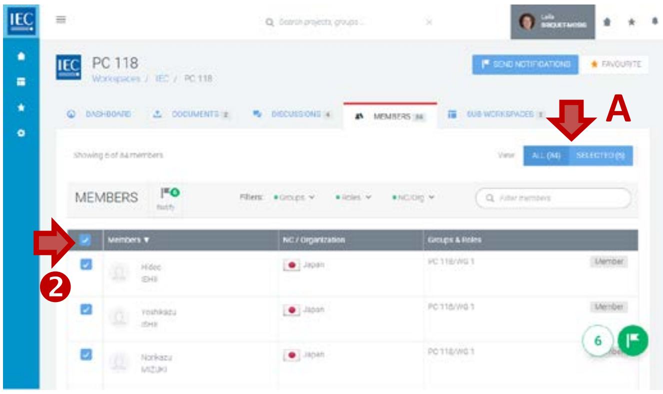


Notify a MEMBER(S)

Once you have located the **workspace** with members you want to notify…

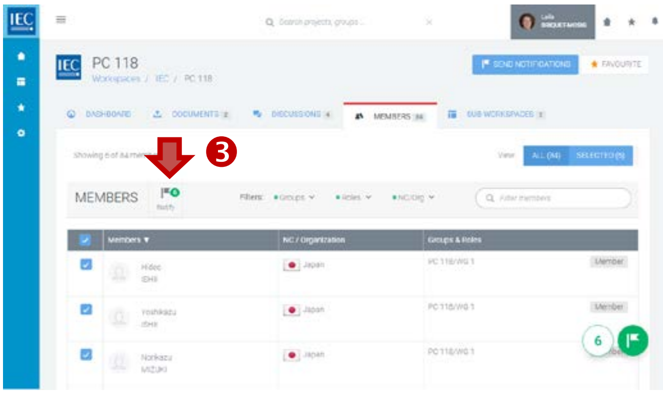


1. **Filter** the list of members
   (by Group, Role, NC/Org and/or text search).



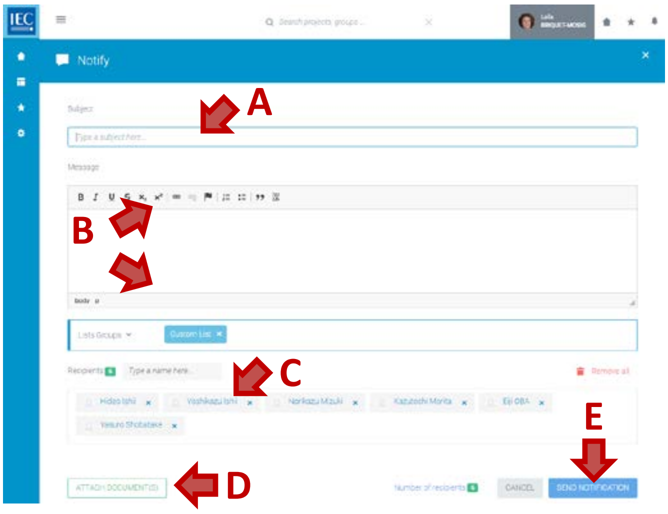
2. Click on the **checkbox** next to the member(s) you want to notify.
   Click the checkbox in the table header to select all members visible in your filtered list.

   A. You can also **switch views** to see **ALL** or **SELECTED** members *(optional)*



3. In the toolbar press the **Notify** button.
   A counter displays how many members have been selected as recipients for the notification.

   *You can also use the **NOTIFY circle button (with notification flag icon)** which will appear in the bottom right of your screen.*



A. Enter a **subject** *(required)*

B. Enter a **body text** *(required)*
(use html formatting as appropriate).

C. **Verify recipients list** *(prefilled)*
*(a **counter** shows the number of recipients).*

D. **Attach documents** *(optional)*
See: [Attach DOCUMENTS (to Discussions or Notifications)]

E. Press the **Send Notification** button
*(a **counter** shows the number of recipients).*