



## Training in international standardization



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Services offered by the  
ISO Central Secretariat  
**2010**



## How to win in the knowledge economy

ISO members who make the most of the various training courses that are provided by the ISO Central Secretariat (ISO/CS)

will derive maximum benefit from participation in the ISO system for their stakeholders and ensure that they are operating efficiently and effectively.

If ISO members and their stakeholders are to participate in the international standardization process in the most effective manner, they need to apply the ISO/IEC Directives correctly and use of a range of electronic tools to access information, or to fulfill their obligations such as voting.

Managing international standardization work efficiently within technical committees, subcommittees, working groups and project committees requires detailed knowledge of the international standardization process. This knowledge can be gained through the training courses offered by ISO/CS.

The courses themselves are up-to-date, informed, reliable and utilize ISO/CS's unique position in being able to incorporate the experiences and good practices of ISO members, committees and working groups.

Participation in the courses leads to improvements in the development and dissemination of International Standards. It can also encourage a "train the trainers" effect that allows those who have taken courses to train staff and key stakeholders in their country on their return.

The courses also enable people to meet other participants – in both actual and virtual classroom environments – performing in similar roles around the world, as well as key ISO/CS staff. A further level of flexibility offered is the provision of customized, on-site training courses for ISO members.

I hope that you take full advantage of ISO Central Secretariat Training Services in 2010 as a means to winning in the knowledge economy.

Rob Steele  
ISO Secretary-General

## Introduction

The ISO Central Secretariat (ISO/CS) organizes structured training activities for ISO members and professionals carrying out specific standards development activities.

The training activities focus on the transfer of knowledge and refinement of skills needed to meet the requirements associated with the development, production and dissemination of International Standards.

ISO organizes both classroom and distance learning courses on the tools and services supporting the standards development process, as well as courses which are designed to assist ISO member bodies with managing their involvement in international standardization.

All these courses are designed for a specific audience. Some of them are aimed at providing key professionals with the opportunity to acquire or refresh the knowledge needed to manage ISO committee work.

These include both experienced and newly appointed secretaries and Chairs of ISO committees, and working group (WG) convenors, as well as committee members.

Other courses are designed specifically for the staff of ISO members in order to help them perform their roles. These include communication and marketing personnel, staff from departments for international relations, and technical directors.

Courses are provided by staff from both ISO/CS and from the ISO members themselves. Many of the courses provided are designed and delivered by the same persons responsible for operating related activities and services at ISO/CS.

ISO/CS training services for ISO members include:

- A set of regular courses covering the most requested topics
- Customized and on-site training to support specific requirements and particular needs of ISO members.



## ISO/CS training courses

The following ISO/CS training courses are presented in this brochure.

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# 1

## Procedures for ISO secretaries

### Description

The course aims to provide a solid base in the core processes involved in the development of ISO projects (standards and other deliverable) as provided for in the *ISO/IEC Directives*, Part 1, and Supplements.

This course is intended to be of benefit to ISO member bodies assuming, or considering assuming, secretariats of ISO technical committees (TCs) and/or subcommittees (SCs). It is specifically intended for the secretaries and support staff.

At the same time, the course is also intended to benefit relevant committee officers, i.e. Chairs, working group (WG) convenors and project leaders (PL), involved in the management of a committee's work programme.

### Objectives

The course aims to develop skills to :

- Understand the importance of implementing the procedures for the technical work as outlined in *ISO/IEC Directives*, Part 1
- Manage ISO projects in a pro-active manner by recognizing the importance of establishing realistic industry-driven milestones and organizing the work to meet them by applying the development timescales laid out in the *ISO/IEC Directives*, Part 1
- Respond and address delays and setbacks in the standards development process.

### Duration

One day

**Note** – Further information may be found at : [http://www.iso.org/iso/standards\\_development/processes\\_and\\_procedures](http://www.iso.org/iso/standards_development/processes_and_procedures)

# 2

## Enhanced participation in international standardization

### Description

This course provides a useful introduction to international standardization and is designed to assist delegates appointed by ISO member bodies and correspondent members. It thus enables national standards bodies to take full advantage of their ISO membership by enhancing their active participation in ISO TCs, SCs and WGs.

The course provides an overview of the ISO structure and major policy-related issues. It also covers the various steps of the International Standards development process and the relevant role of ISO members, committee members and appointed experts. An introduction to the eServices provided by ISO/CS is also provided.

The course is also suitable for staff of ISO member bodies and correspondent members, as well as organizations delegated by them to coordinate national positions and voting, plus trainers and those in charge of international relations. It is also suitable for members of ISO TC/SC national delegations.

### Objectives

The course aims to develop skills to understand :

- The ISO system in general and the role of ISO/CS in particular
- The process of developing an International Standard
- The role of ISO members in the development of standards
- The role of the individual in the development of standards
- How to use ISO's standards development tools.

### Duration

Three days

**Note** – Further information on participating in international standardization may be found in the publications *Joining in – Participating in International Standardization* and *My ISO job*

These publications may be downloaded from [http://www.iso.org/iso/resources/developing\\_countries/](http://www.iso.org/iso/resources/developing_countries/)



# 3

## Drafting standards in accordance with the *ISO/IEC Directives, Part 2*, using the *ISO STD template*

### Description

This course explains and illustrates how the application of the *ISO/IEC Directives, Part 2*, contributes to the standardization process (whether for international, regional or national standards) and demonstrates how the ISO STD template can be used to facilitate the drafting process.

This course is intended for committee secretaries and anyone carrying out an editorial role as part of the standardization process. Prerequisites for the course are a mastery of English, familiarity with Microsoft Word for Windows and Web browsers, as well as some knowledge of the *ISO/IEC Directives, Part 2*.

### Objectives

The course aims to fulfil the following objectives :

- Understand the role of the *ISO/IEC Directives, Part 2*, and how they contribute to the goal of ISO international standardization
- Demonstrate how the *ISO/IEC Directives, Part 2*, are a powerful tool to ensure that ISO standards are fit for purpose as International Standards which are suitable for regional and national adoption
- Draft the common elements of standards using the *ISO/IEC Directives, Part 2*, and the ISO STD template
- Understand the common pitfalls in drafting standards and using the ISO STD template, and how to avoid them
- Complete practical exercises in both drafting and use of the ISO STD template.

### Duration

Four days

**Note** – Further information on drafting standards may be found at [www.iso.org/templates](http://www.iso.org/templates)

# 4

## Using the ISO STD template: practical tips

### Description

The course introduces the use of the ISO STD template for the presentation of ISO International Standards or other ISO deliverables. The course provides a hands-on opportunity to work with the ISO STD template guided by an ISO technical editor. This course is designed for people who are responsible for the formal preparation of International Standards and is therefore aimed primarily at ISO TC/SC secretaries, WG convenors and project leaders.

A prerequisite for the course is a basic familiarity with Microsoft Word for Windows including styles and the use of keyboard shortcuts, as well as a knowledge of the *ISO/IEC Directives, Part 2* and use of Web browsers.

### Objectives

The course aims to develop skills to :

- Enable participants to provide ISO/CS with higher quality documents, in terms of both presentation (using the ISO STD template) and editorial aspects (conformity with the *ISO/IEC Directives, Part 2*), in order to streamline the progress of the documents through the ISO/CS and the standards development process
- Draft an International Standard and other documents using the ISO STD template
- Understand the principles upon which the STD template is based and demonstrate how the ISO STD template is a powerful tool for applying the *ISO/IEC Directives, Part 2*, for the drafting of ISO documents
- Submit documents to ISO/CS in a manner that meets ISO's expectations of what constitutes an acceptable document
- Simplify the task of applying the ISO STD template and benefit from the ISO trainer's own experience in editing standards.

### Duration

Two days

**Note** – Further information on the ISO STD template may be found at [www.iso.org/templates](http://www.iso.org/templates).

# 5

## ISO Global Directory and the NMC extension

### Description

The course gives an introduction and practical training in the use of the ISO Global Directory, which is ISO's main system for registering and managing users and their roles in ISO committees, working groups and other functions in ISO.

The ISO Global Directory is used to support most of the other ISO eServices by providing authorization and user management functions. The course is designed for user administrators in the ISO member bodies and correspondent members.

The course also covers the use of the extension of the ISO Global Directory national mirror committee (NMC) extension service to facilitate the dissemination of ISO documents to national mirror committees.

A prerequisite for the course is basic knowledge of the organizational and procedural principles of ISO's technical work, and experience in the use of the Internet and Web browsers. The course is designed for ISO Global Directory Member Body User Administrators (MBUAs).

### Objectives

The course aims to develop skills to :

- Understand the functions and services of the Global Directory
- Register new users and update existing users
- Assign a user to a role in a committee or a working group
- Register a user to a balloting role
- Understand the difference in registration between centralized and decentralized roles
- Understand the extensions of the ISO Global Directory to manage document dissemination to national mirror committees.
- Map national committees (NMCs) to ISO committees on the Global Directory
- Register individual users and their assignment to NMCs
- Access ISO documents on the NMC server.



# 6 Introduction to ISO eServices

## Description

The course provides an overview of ISO's main electronic services, the content of each service and the access conditions to the servers that host these services. The course is designed for representatives of ISO member bodies and correspondent members dealing with international standardization, IT or training.

## Objectives

The course aims to develop skills to :

- Understand the various types of ISO eServices accessible via **ISO Online**
- Access guidance and reference documents and information relevant for standards developers
- Access and download ISO policy documents and other general documents available on **ISODOC**
- Access and download published standards and draft standards including bibliographical data on ISO's publications available on the **ISOSTD** server and eCommittees
- Understand the collaborative working environment for ISO committees on the **ISOTC server**
- Understand the principles of ISO's user and role management system – the ISO Global Directory
- Understand ISO's **electronic balloting applications** (CIB, DIS/FDIS, SR and WG)
- Configure how and when **event notifications** will be delivered to persons registered to ISO eServices
- Understand and implement the extension of the Global Directory to support the dissemination of ISO documents to **national mirror committees**
- Utilize the test **ISO meeting management** application central to organize and participate in ISO meetings
- Access the set of **electronic authoring tools** which support the preparation of ISO and ISO/IEC standards.

## Duration

Two days

**Note** – Further information on the ISO Global Directory may be found at : [www.iso.org/e-guides](http://www.iso.org/e-guides) (folder : Global Directory)

**See also** *Supporting stakeholders – Disseminating ISO Documents to National Mirror Committees* available for download at [http://www.iso.org/iso/publications\\_and\\_e-products/standards\\_development\\_publications.html](http://www.iso.org/iso/publications_and_e-products/standards_development_publications.html)

## Duration

Two days

**Note** – Further information on ISO e-services may be found at : [www.iso.org/e-guides](http://www.iso.org/e-guides) (folder : eServices)

# 7

## eServices for ISO secretaries

### Description

The course provides hands-on practical training in the electronic committee environment developed to support the collaborative work in ISO TCs, SCs and WGs. The course on electronic balloting provides an introduction to, and practical training in, the use of ISO's balloting applications.

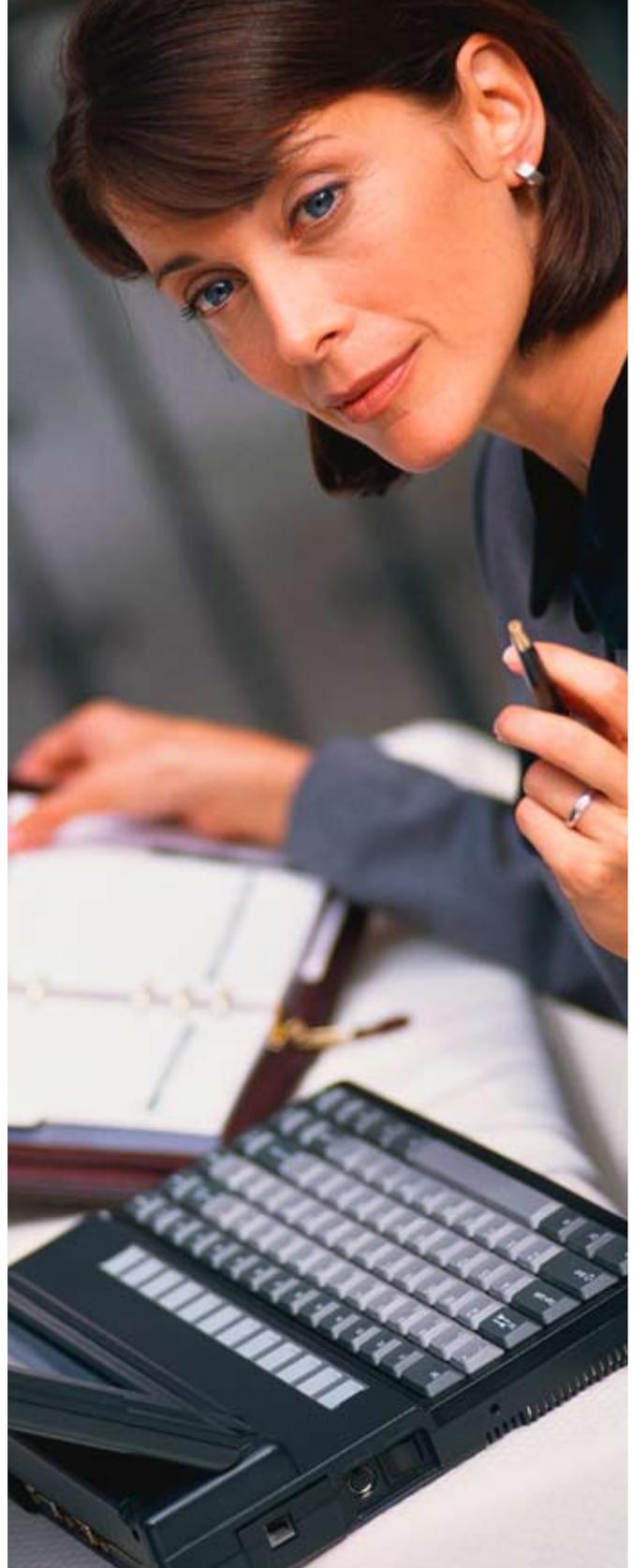
It also explains options in the process of dissemination of ballot documents to national stakeholders and the submission of a national vote. The course demonstrates how to access the final ballot result and explains the subsequent processes of comment collation. The course is designed for secretaries and support staff of ISO TC/SCs as well as conveners of WGs.

A prerequisite for the course is basic knowledge of the organizational and procedural principles of ISO's technical work and some experience in ISO committee work. Participants must have a good understanding of English.

### Objectives

The course aims to develop skills to :

- Understand the basic features of the *Livelihood* document management system
- Understand the electronic environment developed for ISO committee work including the new ISO eCommittee for daily standardization work
- Manage an electronic committee in terms of document dissemination and electronic balloting for individuals fulfilling the role of ISO TC/SC secretary, WG convener, or their support staff
- Understand the principles of user and role registration using the ISO Global Directory
- Use ISO's electronic balloting applications and be able to organize committee ballots
- Use the ISO Project Portal, providing access to all stages of all ISO committee work programmes
- Use the submission interface, providing a structured method for the submission of files by committee secretaries and their support staff to ISO/CS



- Utilize the ISO Event Notifications system informing, users by e-mail, about changes in different ISO eServices applications, such as changes in committee participation, role(s) or addresses.

### Duration

Two days

**Note** – Further information on the ISOTC server is found at :

[www.iso.org/e-guides](http://www.iso.org/e-guides) (folder : ISOTC server and Livelihood) as well as under : [www.iso.org/e-balloting](http://www.iso.org/e-balloting)



## ISO expert in international standardization (eLearning course)

### Description

This new course has been developed by ISO/CS with the aim of providing in-depth and practical distance learning to the staff of ISO member bodies and correspondent members in key aspects of international standardization.

The course utilizes the “learning by doing” approach with students playing the role of a technical officer in the Southistan Bureau of Standards (SBS) in the fictional country of Southistan. The modules are conducted in the *OpenText Livelink* environment with the students’ work being submitted to a course mentor for assessment and comprises materials and tools specially developed for the course. These materials are also of practical use to a standards body. The course is divided into three separate, independent modules.

Students are taken through a number of tasks relevant to planning, organizing and participating in international standardization, as well as to implementing International Standards.

### Module tasks

#### Module 1

Assessing priorities for standardization – duration, six months

- Analysing fields of national interest and assessing priorities
- Communicating with stakeholders
- Identifying relevant International Standards and work items
- Drafting a three-year action plan (selecting items, prioritising fields of activity and estimating the resources needed)
- Accommodating stakeholder feedback.

#### Module 2

Managing participation in international standardization – duration, four months

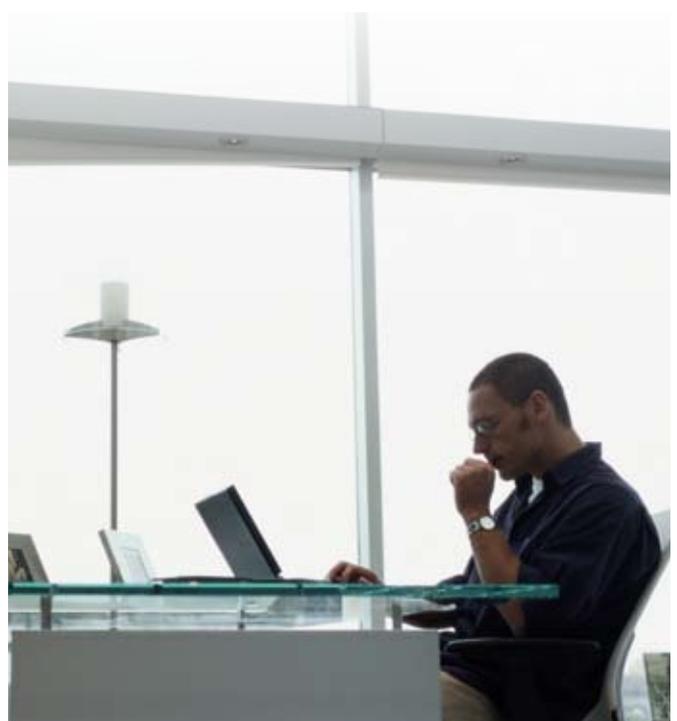
- Managing the circulation of relevant information and documents in a rigorous and efficient manner
- Organizing and implementing improved project management processes
- Supporting the dialogue among national interests, and consensus building
- Preparing for ISO and national mirror committee meetings
- Supporting the consolidation of national positions.

#### Module 3

Adopting and implementing International Standards – duration, three months

- Ensuring the correct application of ISO/IEC Guide 21, *Regional or national adoption of international standards and other international deliverables*, Parts 1 and 2
- Understanding and communicating the benefits of standardization for specific sectors
- Interacting with standards users to monitor the use of standards and collect feedback
- Providing expertise on issues related to the implementation of the ISO standards adopted (including consulting and training programmes).

For more information on nominating a participating for these modules, ISO members should contact [training@iso.org](mailto:training@iso.org)



# 9

## Marketing and promotion of ISO International Standards

### Description

The course gives an introduction and practical training on the marketing and sales of International Standards and other ISO deliverables. The course is designed for marketing and sales officers of ISO member bodies, correspondent members and their staff. It may also be of interest to communication officers and their staff, as well as to the management in general of national standards bodies.

### Objectives

The course aims to develop skills to understand:

- The ISO system in general and the role of the ISO/CS in particular
- Marketing in general and marketing in the ISO system in particular
- Basic policies governing marketing in the ISO system
- The importance of copyright and the protection of ISO's intellectual property
- ISO POCOSA 2005 *ISO Policies and Procedures for Copyright, Copyright Exploitation Rights and Sales of ISO Publications*
- The product mix, including the use of the ISOSTD server
- The price mix, including the pricing structure, royalties and retrocessions
- The place mix
- The promotion mix, including the use of the ISO Marketing and Communication Web site.

### Duration

Three days

**Note** – Further information on ISO marketing and promotion may be found on the ISO Marketing and Communication web site at [www.iso.org/marcom](http://www.iso.org/marcom)

# 10

## Good standardization practice

### Description

Alongside the growth of international trade and technological cooperation, procedures and modes of cooperation which are commonly considered to constitute good practice for standards development at all levels have been developed by various parties.

Such practices are set out in a number of codes and guidelines, including notably in the World Trade Organization Agreement on Technical Barriers to Trade, Annex 3, *Code of Good Practice for the Preparation, Adoption and Application of Standards*.

This course provides a top-level introduction with in-depth applications of good standardization practice, highlighting the TBT Code as well as other resources. It explains what needs to be done to produce credible standards at the national level and explains linkages and participation in regional and international standardization. The course also contributes to the knowledge and training necessary to satisfy WTO obligations related to good standardization practice.

The course is targeted at technical directors of ISO member bodies and correspondent members. In addition, the course will also benefit those running national committees, in particular secretaries of national TC/SCs. A prerequisite for the course is at least a basic understanding of international standardization.

### Objectives

The course aims to develop skills to:

- Organize standardization activities at the national level, in accordance with the Code of Good Practice
- Ensure that different stakeholders are appropriately represented
- Develop consistent and coherent standards without “re-inventing the wheel”
- Implement a system of due process in the development of standards which everyone can understand.

### Duration

Two days

**Note** – Further information on the WTO/TBT Code of Good Practice may be found at [www.iso.org/wtocode](http://www.iso.org/wtocode), and the ISO-UNIDO publication *Fast forward – National Standards Bodies in Developing Countries*



## How to participate

ISO/CS training courses (except e-learning course) are offered in Geneva, Switzerland, at the ISO/CS premises, or can be organized on-site.

**a)** Regular sessions in Geneva – free-of-charge sessions of some of the regular courses are organized for ISO member bodies and correspondent members. Applicants will be registered on a first-come first-served basis, while endeavoring to ensure equal opportunity among the membership. Travel and accommodation costs are to be covered by each participant at his/her own expense. ISO does not undertake to seek funding on behalf of participants from donors. Pre-registration for the regular session should come through the relevant ISO member. The pre-registration form for the regular sessions may be found at: <http://www.iso.org/training-dates>

**b)** Customized courses (cost recovery basis) – Training sessions can be organized upon request at the premises of ISO members or in Geneva. Sessions will be organized subject to availability of suitable instructors on the proposed dates. The duration and content of these sessions can be customized according to the needs of the requestor. All ISO/CS regular training courses are based upon modular content. This facilitates potential customization including omission or expansion of topics, according to the specific requirements of the participants. For customized sessions, pricing is determined on the basis of full cost recovery.

ISO/CS will apply a fee-per-day per instructor. Instructor(s) travel and accommodation expenses and per diem allowance will be charged according to the ISO/CS staff rules. Design and implementation of customized services (e.g. development of ad hoc training modules and materials), if requested will be charged on a time and material basis.

## Contact

To plan, reserve or obtain an estimate for a training session, or for more information on regular courses, including e-learning courses, please contact ISO Development and Training Services (DEV-T) at: [training@iso.org](mailto:training@iso.org).



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