



# **BSOL** User Guide

January 2022





### **Contents**

1	Regi	stering to BSOL	6
	1.1	Registering to a Subscription with a username and password: With a BSOL licence key	.6
	1.1.1	Activating your account	6
	1.2	Registering to a Subscription with a username and password: Without a BSOL licence key	. 7
	1.2.1	Activating your account	7
	1.3	Activating your email address	. 7
	1.4	Adding additional licence keys to your BSOL account	.8
	1.5	Logging into BSOL via IP Recognition:	. 8
	1.6	Resetting your password	. 9
	1.7	Logging into BSOL via Blind Login	. 9
	1.8	Logging into BSOL via Institutional login (UK Federation)	. 9
	1.9	Logging in – WAYFless links	11
	1.10	Understanding the different user access types	11
	1.10.	1 Individual Users	. 11
	1.10.	2 Individual users with Custom Collection admin rights	. 11
	1.10.	3 Institutional users	. 11
	1.10.	4 IP recognised user	. 12
	1.10.	5 MLA – Public library user	. 12
	1.10.	6 MLA – Staff User	. 12
	1.10.	7 Blind Login user	. 12
	1.11	Logging out	12
	1.12	Timing out:	12
2	My A	Account	. 13
	2.1	My Profile	13
	2.1.1	Changing your password	. 13
	2.1.2	,	
	2.2	My Subscription	13
	2.3	My Membership	13
	2.3.1	My Membership accounts	. 13
	2.4	Document requests	
	2.5	FAQ's	14
3	Usin		. <b>15</b>
		Inspiring trust for a more resilient wor	ıu.





3.1	Se	arching on BSOL	15
3.1.1	l	Using a standard number	. 15
3.1.2	2	Activate licence key	. 15
3.1.3	3	Using a prefix during a search	. 16
3.1.4	1	Using a keyword during a search	. 16
3.1.5	5	Auto-Suggestion	. 17
3.1.6	5	Using more than one keyword in the search:	. 17
3.2	Ac	vance search on BSOL	19
3.2.1	L	Status	. 20
3.2.2	2	Publisher	. 20
3.2.3	3	Publication date	. 20
3.2.4	1	Update type	. 21
3.2.5	5	ISBN	. 21
3.2.6	5	Module Number	. 21
3.2.7	7	ICS Category	. 22
3.2.8	3	Search tips	. 23
3.2.9	)	Filtering search results	. 24
3.3	Br	owse for standards	26
3.3.1	l	Browse by modules	. 27
3.3.2	2	Browse by subject (ICS Code)	. 27
3.4	Vi	ewing the standards	28
3.4.1	L	Using the in browser quick view option.	. 28
3.4.2	2	Using the download Adobe Acrobat option.	. 28
3.4.3	3	Digital Rights Management (DRM)	. 29
3.4.4	1	FileOpen Plug-in	. 30
3.5	Bil	pliographic Data	33
3.6	My	/ Favourites	34
3.6.1	L	Adding standards to My Favourites	. 34
3.6.2	2	Downloading standards from My Favourites	. 34
3.7	My	/ Email Alerts - Individual	35
3.7.1	L	Creating an Email Alerts List	. 35
3.7.2	2	Adding modules or ICS codes to your list	. 36
3.7.3	3	Adding Standards to your list	
		Inspiring trust for a more resilient wor	Ιd





	3.7.4	Batch upload of standards to an Individual Email Alert List	37
	3.7.5	Renaming a list	37
	3.7.6	Manually checking for updates	38
	3.7.7	Copy or move documents from different lists	38
	3.7.8	Change the frequency of the alerts	38
	3.7.9	Deleting a My Email Alerts list	39
3	3.8	My Email Alerts – Group	39
	3.8.1	Activating a Group Email Alert List	39
	3.8.2	Creating a Group Email Alert List	40
	3.8.3	Sharing your Group Email Alert List with other users	41
	3.8.4	Viewing a Group Email Alert List	41
	3.8.5	Editing a Group Email Alert List	42
	3.8.6	Deleting a Group Email Alert List	42
4	Туре	es of BSOL Subscriptions	43
4	l.1	Modular Subscription – Full Collection	43
4	1.2	Modular Subscription – Subject based modules	43
4	l.3	Custom Collection Subscription	43
	4.3.1	Custom Collection content	43
	4.3.2	Viewing a Custom Collection subscription	43
	4.3.3	Adding standards to your Custom Collection subscription	44
	4.3.4	Removing documents from a Custom Collection	44
	4.3.5	Requesting a standard not currently in a Custom Collection Subscription	47
	4.3.6	Responding to a request to add standards to a Custom Collection Subscription	47
4	1.4	Hardcopy only standards	49
4	ł.5	Purchasing a standard not in your Subscription	49
5	BSO	L Content	50
5	5.1	Types of documents within BSOL	50
	5.1.1	BS Documents (British Standards)	50
	5.1.2	EN Documents (European Standards)	50
	5.1.3	prEN Documents	50
	5.1.4	ISO Documents (International Organization for Standardization)	50
	5.1.5	IEC Documents (International Electrotechnical Commission)	50
	5.1.6	ASTM Documents (American Society for Testing and Materials)	50 <b>vorld</b>





	5.1.7	' ASME Documents (The American Society of Mechanical Engineers)	51
	5.1.8	Draft Documents	51
	5.1.9	Tracked Changes (TC) Documents	51
	5.2	Document statuses	. 51
	5.3	Conformity to Regulations	. 52
	5.3.1	Designated by UK Government	52
	5.3.2	Cited in the Official Journal of the European Union	53
	5.3.3	Further Information	53
	5.4	Standard number formats	. 53
	5.5	BSI standard number prefixes	. 54
	5.6	ICS Classification	. 54
	5.7	BSOL Modules	. 57
	5.8	Update types	. 59
6	Supp	port	60
	6.1	Help and FAQ's	. 60
	6.1.1	Search within help	60
	6.1.2	User guide	60
	6.1.3	Training	60
	6.2	BSI Account Manager	. 60
	6.3	BSI Subscription Support	. 61
	6.4	BSI Subscription Support contact details	. 61
7	Revi	sion History	62





### **Registering to BSOL**

How you access your organisation's subscription will depend on how the subscription has been configured, which is based on your organisation's needs.

If your company has a username and password authentication set up, you will need to register to BSOL using your nominated email address and choose a secure password. There are two ways to register using a username and password authentication; with a licence key and without a licence key.

### 1.1 Registering to a Subscription with a username and password: With a BSOL licence key

Go to https://bsol.bsigroup.com to log in

Select 'Register as a new user'

Select 'Register me! I have a license key'

Enter the Subscription licence key, followed by your nominated email address and a secure password.

If you have already registered to BSOL previously, you will be prompted to log in using your existing password. If you have forgotten your password, please reset your password.

For further information on how to reset your password, see 1.6 Resetting your password.

The next page will require you to fill out your account details as seen below. These include Full Name, office address and job title.

**Finish** 

#### 1.1.1 Activating your account

Once you have entered your registration details, you will be sent a verification link that's sent to the email address you have registered with, the link will last for 30 minutes.

For further information, see <u>1.3 Activating your email address</u>





# 1.2 Registering to a Subscription with a username and password: Without a BSOL licence key

Go to https://bsol.bsigroup.com to log in

Select 'Register as a new user'

Select 'Register me! I don't have a license key'

Enter your organisation's BSI account number and contract number.

The next page will require you to fill out your account details as seen below. These include full name, office address and job title.

#### Finish

A window will appear confirming your registration request has been received by our Subscription Support Team who will process the registration.

### 1.2.1 Activating your account

Once you have entered your registration details, you will be sent a verification link that's sent to the email address you have registered with, the link will last for 30 minutes.

For further information, see <u>1.3 Activating your email address</u>

#### 1.3 Activating your email address

Once registered, you will need to activate your account by clicking on a verification link that's sent to the email address you have registered with, the link will be valid for 30 minutes.

If the 30 minutes elapses and you click on the link, it will confirm the activation request has expired. There will be an option to resend the verification link to restart the activation process.

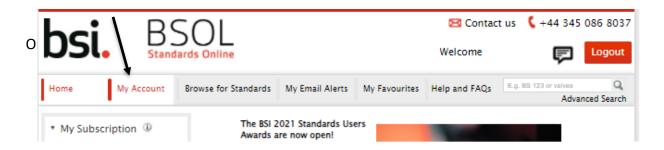
Until you have activated your account you won't be able to access BSOL.

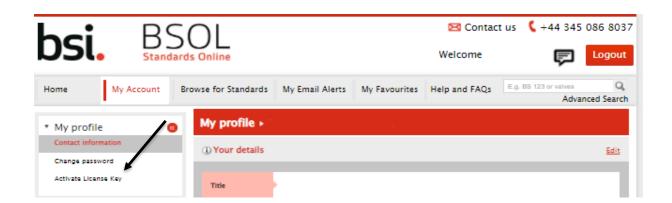


### 1.4 Adding additional licence keys to your BSOL account

You can add additional license keys from within your accounts page on BSOL.

To do this, navigate to the 'My Account' page shown below.





Upon confirmation, you will be logged out of your current BSOL session and asked to log in again. Upon logging in, you will have access to the new content.

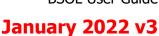
### 1.5 Logging into BSOL via IP Recognition:

A subscription can be set up to recognise and authenticate users by an IP range. Your administrator should supply the relevant IP ranges to the Subscription Support Team who will need to verify these and add them to the subscription.

Once these are active, all users accessing from with the IP range will be logged in automatically upon visiting the BSOL website, if there are available licenses.

To login, go to BSOL https://bsol.bsigroup.com

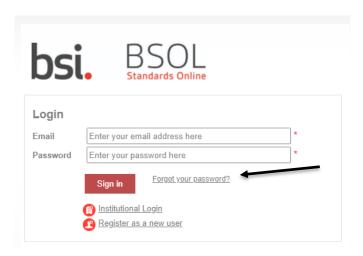
You will be logged in immediately, provided licenses are available, and taken directly to the home screen.





### 1.6 Resetting your password

Simply click on the 'Forgot your password?' link on the front page and you will be prompted to enter the email address of the account you have forgotten the password for. This will send a reset link through to that email address.



### 1.7 Logging into BSOL via Blind Login

A Blind Login requires a fixed location within a subscribers' intranet or website. The administrator for your subscription will need to provide the BSOL support desk with the page location address. They will then be provided with an encrypted link which should be installed on the page address that was provided.

Users accessing via this method can only access BSOL from this fixed location.

### 1.8 Logging into BSOL via Institutional login (UK Federation)

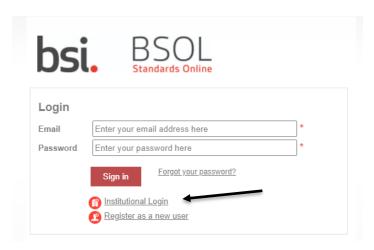
BSOL offers institutional login to members of the UK Access Management Federation (UKAMF). Users of these member organisations can log into BSOL using their organisational credentials, such as a university email address and password.

If your organisation is a member of the UKAMF, BSOL will recognise the institution and offer autocomplete suggestions. You will then be taken to your organisation's website to input your login details, and upon successfully logging in be redirected back to BSOL.

If you are unsure regarding your organisation's membership of the UKAMF, please visit their site at https://www.ukfederation.org.uk/content/Documents/MemberList or contact them at service@ukfederation.org.uk



To log in as an institutional user, please select 'Institutional Login' below the username and password fields on the login page:



Then, select your institution from the dropdown menu or use the search bar to locate it and click 'Go'.



You will then be taken to your organisation's website to input your login details, and upon successfully logging in be redirected back to BSOL.





### 1.9 Logging in – WAYFless links

If your organisation is a member of the UKAMF, you can also set up WAYFless (Where-Are-You-From) links to direct users to content immediately upon login.

The format for WAYFless links is as follows:

https://federation.bsigroup.com/start-session?entityID=[Your Entity ID]&target=[Specific BSOL page] For example:

https://federation.bsigroup.com/start-session?entityID=https://test-site.ac.uk/shibboleth&target=https://bsol.bsigroup.com/Bibliographic/BibliographicInfoData/0000000003 0337673

Upon logging in via this link, users will be redirected to the page: https://bsol.bsigroup.com/Bibliographic/BibliographicInfoData/00000000030337673

If users have already authenticated with their institution, they will be directed to the page automatically.

### 1.10 Understanding the different user access types

Depending on your Subscription access method, there may be slightly different functionality enabled.

### 1.10.1 Individual Users

This is the default access method and have access to all functions, unless there is a specific request within the subscription.

### 1.10.2 Individual users with Custom Collection admin rights

If you subscribe to a Custom Collection, your organisation will nominate a user/(s) to hold the administrational rights on the Custom Collection. The administrator can add standards to the collection and accept requests from other users.

#### 1.10.3 Institutional users

Institutional users are generally used on subscriptions for shared credentials or automated login methods. Institutional users do not have any individual functions such as individual My Email Alerts.



### 1.10.4 IP recognised user

An IP address is a unique address that identifies a device on the internet or a local network. By using IP authentication, the user is logged into BSOL automatically.

Commonly used on University subscriptions. IP recognition can also be used on larger company subscriptions where a large volume of users require access. IP recognized users do not have any of the personal functions associated with an individual user. IP recognition and individual login can be used on a subscription under certain circumstances.

A lockout function exists to enable individual users to login and access their personal functions. To return to the main IP login, you are required to close all internet browsers.

### 1.10.5 MLA – Public library user

Library customer accessing BSOL at a library branch. The customer can view the standards but cannot save email or print the file. Also, the documents may be embedded in the browser rather than on a separate Adobe page.

#### 1.10.6 MLA - Staff User

Library Staff Members can have full access and administrational rights.

#### 1.10.7 Blind Login user

Access is only given if the user clicks on the link. Copying the address into the browser bar will not allow the user access. This is normally only offered to subscriptions with many users

### 1.11 Logging out

The log out button is in the top right of every BSOL screen.

You will be redirected to a confirmation page with various options of returning and logging in. We suggest that all users log out manually at the end of a session to clear the license immediately.

If you access via an IP registration you may have to close your internet browsers to refresh the IP authentication.

### 1.12 Timing out:

If the user is inactive for a 15-minute period they will automatically initiate a soft log out. When returning to the computer, if a license is available, the user will be returned to the active page they were last on.

If no more licenses are available on return a hard log out will initiate. The user will receive a message advising they have been logged out and they will have to wait until a license becomes available again.





### 2 My Account

The following information can be found after clicking on 'My Account' at the top of the BSOL page.

### 2.1 My Profile

You can edit your details and contact information, change your password and activate a Subscription licence key

### 2.1.1 Changing your password

1<sup>st</sup> line: Enter your current password
2<sup>nd</sup> line: Enter your new password
3<sup>rd</sup> line: Confirm your new password

Save.

If you are unsure of your current password, see <u>1.6 Resetting your password.</u>

#### 2.1.2 Activate licence key

See 1.1 Adding additional licence keys to your BSOL account

### 2.2 My Subscription

Choosing "My Subscription" from the left-hand column will display your subscription options in the main area of the screen.

Clicking on each of the subscription's names will display the subscription documents.

### 2.3 My Membership

My Membership is an annual Subscription which can be subscribed to alongside a BSOL Subscription. There are many different benefits to being a BSI Member. There are links on this page which will provide you more detail to the different benefits.

### 2.3.1 My Membership accounts

If your organisation subscribes to BSI Membership, you will find the account information on this page. It will confirm the account number, billing address, shipping address and the end date of the Membership Subscription.





### 2.4 Document requests

On this page, you will find a summary of document requests which require approval. For more information on document requests see:

- 4.3.5 Requesting a standard not currently in a Custom Collection Subscription
- 4.3.6 Responding to a request to add standards to a Custom Collection Subscription

### 2.5 FAQ's

On this page, you can find links to the BSOL FAQ's.

For more information on FAQ's see: 6.1 Help and FAQ's





### 3 Using BSOL

### 3.1 Searching on BSOL

On each page of BSOL you have access to a quick search bar at the top of the page. This is found on the navigation menu.

The search bar will perform a simple search enabling you to search for standards by number, keyword and phrase. The simple search searches the standard number field, title field and the descriptors field only.

However, this field can be combined with other options in the Advanced Search page. For further information, see <u>3.2 Advance search on BSOL</u>

### 3.1.1 Using a standard number

Searching by standard number will return relevant results based on the number entered. Where possible it will find exact matches. Additionally, this option will allow you to user the standard prefix e.g. BS, BS EN, etc.

As you start to type the number, the auto-suggestion system will start to suggest possible standard numbers based on your search terms.

If you hover over one of the auto-suggestions the search field will automatically be populated. Once you have completed one or more searches, you will also be presented with a search history option in the auto-suggestions.

If you are unsure of the letter prefix or the spacing of the prefix, leave this out and use the number string only. However, please check the title of the standard you have found as the same number prefix may have been coincidentally used by more than one standards body in BSOL for different standards.

#### 3.1.2 Activate licence key

Auto-suggestions can be enabled or disabled at any time from this field. Once it appears as you type click on "Turn suggestions OFF / ON" to disable / enable this function.

bs 10008:2014

BSOL Suggestions
bs 100**08:2014** 



### 3.1.3 Using a prefix during a search

Using the number **9000** produces 62 results containing the number **9000** in the standard number and title.

These include:

BS EN ISO 9000:2015 Quality management systems. Fundamentals and vocabulary

BS EN ISO 9000:2005 Quality management systems. Fundamentals and vocabulary

BS EN ISO 9000-3:1997 Guidelines for the application of ISO 9001:1994 to the development,

supply, installation and maintenance of computer software.

BS ISO 9000-2:1997 Quality management and quality assurance standards. Generic

guidelines for the application of ISO 9001, ISO 9002 and ISO 9003.

BS 9000-1:1989 General requirements for a system for electronic components of

assessed quality. Specification of general procedures.

Using the number 900 in this field produces 116 results.

These include:

PAS 900:2010 Code of Practice for Wheelchair passports

BS EN 900:2007 Chemicals used for treatment of water intended for human

consumption. Calcium hypochlorite.

Using the term **BS9000** is asking the search to look for both the term **BS** and **9000**. This
produces only 4 results

These include:

BS EN 900:2007 Chemicals used for treatment of water intended for human

consumption. Calcium hypochlorite.

BS EN 900:2000 Chemicals used for treatment of water intended for human

consumption. Calcium hypochlorite.

### 3.1.4 Using a keyword during a search

Searching by keyword will return results using a word stemming search and sorting by relevance. Word stemming uses a Thesaurus of words and looks for common roots words, however, different but similar words may produce slightly different results.



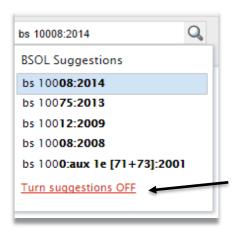
Example – "Rail" will produce a different set of results from "railway". In this instance 636 for rail and 1193 for railway. (It is possible that not every variation of each word is listed in the Thesaurus). These numbers are always changing so at the time of reading this there may be more / less results produced.

Similar to standard numbers, as you start to type the word, the auto-suggestion system will start to suggest possible words or phrases based on your search terms. Hovering over any of these and selecting it will populate the search field.

Once you have completed one or more searches, you will also be presented with a search history option in the auto-suggestions as well.

### 3.1.5 Auto-Suggestion

Auto-suggestions can be enabled or disabled at any time from this field. Once it appears as you type click on "Turn suggestions OFF / ON" to disable / enable this function.

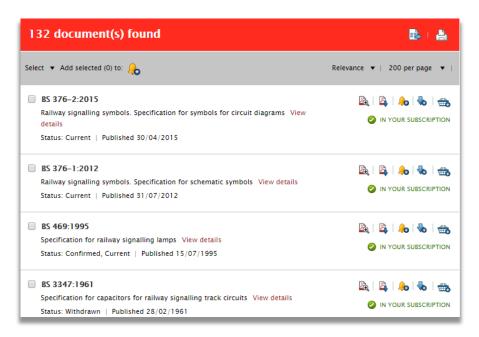


### 3.1.6 Using more than one keyword in the search:

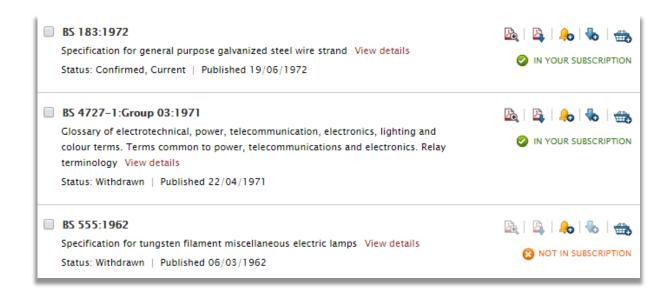
Using more than one keyword in the search will produce an 'AND' search. Results are sorted by quality of hit and relevance of result. Example: 'Railway Signalling' as the search term produces 132 results.







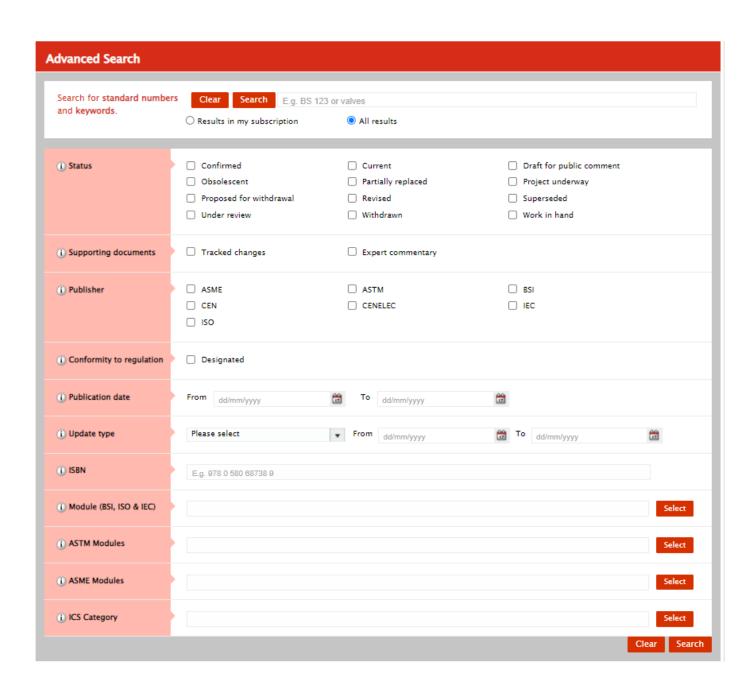
The first set of results contain the words *Railway* and *Signalling* prominently, but as you look down the list of results you will notice that the keywords are found less frequently together in the title but may be found more frequently on the description page of each result as descriptor keywords.





### 3.2 Advance search on BSOL

The advanced search page can be accessed from the menu at the top of each page on BSOL. You can combine any of the onscreen options together prior to launching your query.





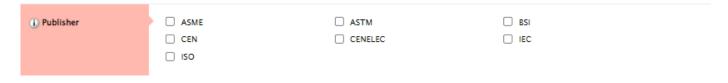
#### 3.2.1 Status

Status allows you to select specific options based on the type of Standard you are looking for. Multiple options can be selected at the same time



#### 3.2.2 Publisher

These allow you to select from specific standard publishers. Multiple options can be selected, or this section can be left blank to search from all publishers.



#### 3.2.3 Publication date

Publication date search allows you to identify documents that have been published within a defined time period. You can enter an exact date range (in **dd/mm/yyyy** format) in the *From* and *To* boxes or use the view calendar link.



Clicking on the calendar icon will open the full calendar for that window allowing you to select the dates manually from there.





### 3.2.4 Update type

This allows you to search for changes to standards' statuses over a specific period.



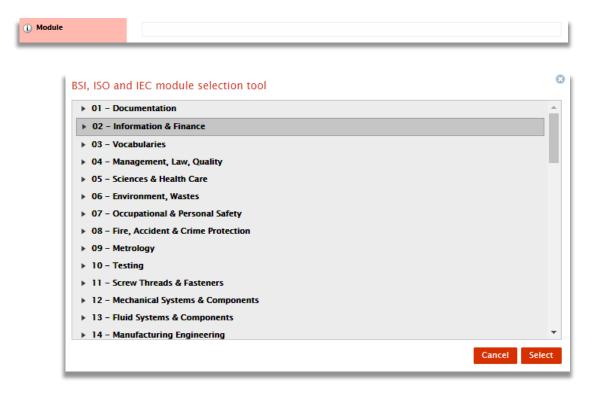
#### 3.2.5 ISBN

This allows you to search by the documents 13-digit ISBN number if you know it (note, there is no space sensitivity on the 13-digit number)



### 3.2.6 Module Number

This allows you to search for standards by Module classifications. For more information on modules, <u>See</u> 5.8 BSOL Modules.



By clicking anywhere in the box by 'Module' or clicking on the 'Select' button you will open the module menu.

You can select as many modules as required by clicking on the dropdown arrows.

Inspiring trust for a more resilient world.



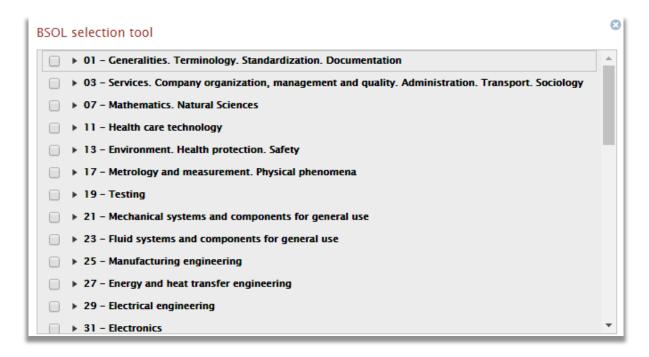


From here you can select which publishers you which to filter. If you want to see all results you can tick 'Select All' and they will all be included on your search.

### 3.2.7 ICS Category

ICS categories are an international classification system for standards. For more information on ICS classifications, see 5.7 ICS Classification.

By clicking anywhere in the box by 'ICS Category' or clicking on the 'Select' button you will open the BSOL selection tool.





You can then choose as many modules as required to populate the advanced search box. Each ICS Category has a submenu where you can refine your search to be more specific about what you are after.

I	BSOL selection tool			
ı		▶ 01 - Generalities. Terminology. Standardization. Documentation		
ı		▼ 03 - Services. Company organization, management and quality. Administration. Transport. Sociology		
ı		03.020 - Sociology. Demography		
ı		03.040 - Labour. Employment		
ı		03.060 – Finances. Banking. Monetary systems. Insurance		

#### 3.2.8 Search tips

Some of the more common searching / browsing queries can be found here in example form.

- The "Keywords" search box can be best described as *search all terms*. You can use this field to search for drafts using the proposed standard number instead of the draft number, which you may not know.
- When searching for very short numbers using the number search, the result you are looking for may be further down the page. Try changing the rank of the results to alphanumeric a-z using the "Sort By" dropdown menu in the results page, then press update to apply the sort.
- You can wrap the search term in inverted commas " " to look for a number or phrase.

### Example:

Using "BS 16" (written in the standard number search with the inverted commas included) found only one match.

### BS 16:1974

Using **BS 16** (without the inverted commas) resulted in 188 results. BS 16:1974 was not on the first page of results. However, changing to A-Z found the standard as the 6th result.

You can also use the inverted commas tip within the keywords search to look for a phrase, perhaps part of a title of a standard:

### Example:

Using "Aerospace series" as a keyword search (with the inverted commas) finds all standards containing this phrase in its title. However, this example results in 2857 results. To narrow these down you can use additional keywords using the SEARCH WITHIN YOUR RESULTS box and the dynamic filters on the left of the results.

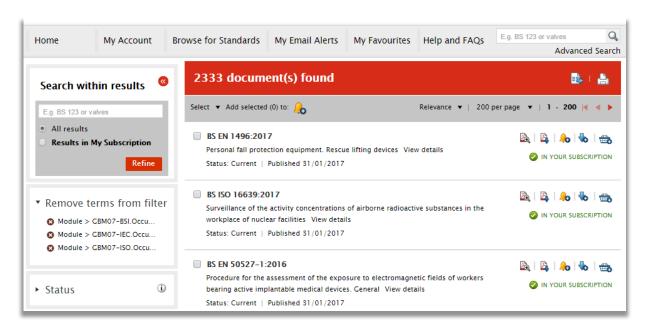




#### 3.2.9 Filtering search results

Once you have searched for a document you have the option to user a series of filters in the left-hand margin.

These filters in the left-hand margin will display relevant results based on the search criteria. Choosing one of them will refine the results and add the search term to the search string.



The filter options can be seen in the image displayed. Hover over the 'i' icon next to each of these options will give a brief explanation of the filter.

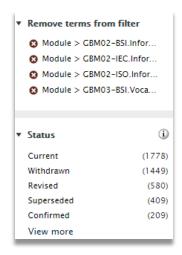
Clicking on each of the terms will expand and display the dynamic options available based on your search.

Click on the arrows next to each filter will give you an indication of how many hits have been found for that heading, within this search.

Choosing one of these options will combine the original search term with the filter option and the page will be updated to display the new results set.

The left-hand filter options will also refresh and display the new matches found within the filters.





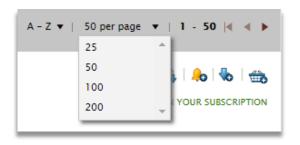
Your combined search filter terms will be listed near the top of the left-hand section.

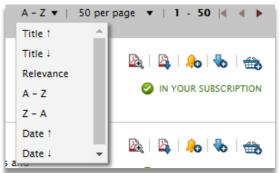
As seen in the image to the left you can click the red cross icon to remove that specific filter term from the search. The page will automatically refresh, and results based on the remaining terms will be displayed.

You also have options to "**Sort by**" and increase the "**Items per page**" which are displayed on the results page. You can find these options at the top of the results set to the right.

Click on "**Sort by**" to display the options available. Choose the relevant option and the page will update automatically.

Click on "Item per page" to display the options available. Choose the relevant option and the page will update automatically.









#### 3.3 Browse for standards

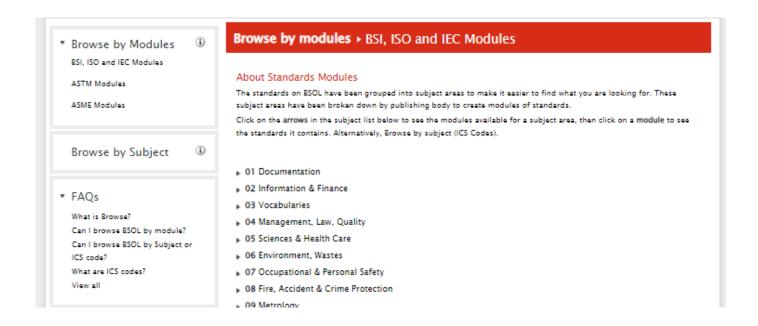
The Browse for Standards page can be access from menu at the top of each page on BSOL.

The Browse area helps you to look through the whole BSI catalogue. You can browse by BSOL subscription module or by subject (ICS codes). ICS (International Classification of Standards) codes are a subject-based classification system for standards.

When you select a module or a subject in browse you'll be taken to a list of matching standards, which you can further filter using the "Refine your search" features on the left-hand side of the results page.

The browse function enables you to browse the whole BSI catalogue by module or by ICS codes.

This is particularly useful when exploring a complete subject to identify related standards. Clicking onto the browse tab on the top toolbar will open the browse page. You can choose to browse by modules from the left of the page.







### 3.3.1 Browse by modules

Browse by Modules allows you to see all modules as a list.

Selecting from the left-hand column allows you refine by the standards modules.

Clicking onto one of these modules will display the complete contents of the module in the search results page. You can then access the required document or use the filter functions to refine your search as required.



For more information on BSI Modules, see 5.8 BSOL Modules

### 3.3.2 Browse by subject (ICS Code)

Browse by subject allows you to search using the ICS categories. Clicking on any of the arrows will expand the category, listing the subgroups.



Clicking onto one of these ICS categories will return a search result page listing all standards within the category.

For more information on ICS codes, see <u>5.7 ICS Classification</u>

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### 3.4 Viewing the standards

Once on the results page or within your Subscription details you can view any document which is in your subscription within a PDF view. The two options for viewing the standard are:

- Downloading to Adobe Acrobat IN YOUR SUBSCRIPTION

In order to view a standard, by download or quick view, the standard must be in your subscription which is indicated by the green notification message below the icons.

3.4.1 Using the in browser quick view option.

Click on the "Quick View" Icon.



After selecting the "Quick View" icon the browser will open a document in the same tab.

At the top of the page a selection of tools like many PDF readers are available.

When you wish to return to BSOL there is an option in the top right corner saying, "Return to BSOL".

3.4.2 Using the download Adobe Acrobat option.

In order to download a standard, you must have a FileOpen plug-in installed on your device. For more information please see 3.3 Digital Rights Management

Click on the "download" icon



The download PDF option will give you the option to either open the document straight away or save it to your device.

Click on the download at the bottom of your browser when it is complete to open the PDF. As a default the file will open in a new tab in your active browser. The file can also be open in a PDF viewer by right clicking and selecting the "*Open with*" option from the download location of the file.







As a default the standard name will be formatted as

### Standard name - Year - [year/date/month/time of download]

After downloading the document, you can rename it if required. Opening the document in a PDF viewer the normal tools will be available for use. In the example of Adobe Acrobat Reader, you will be able to annotate the document, add comments, and highlight areas of text from the tools menu.

### 3.4.3 Digital Rights Management (DRM)

BSI is fully committed to improving the digital security of our standards, protecting our clients from potentially fraudulent activity and our Standards Development partners from copyright and intellectual property breaches. To help us achieve this, we added an extra layer of security to our documents.

BSI's documents will only be opened with the FileOpen plug-in installed on your device. It will help us keep your documents and experience more secure.



### 3.4.4 FileOpen Plug-in

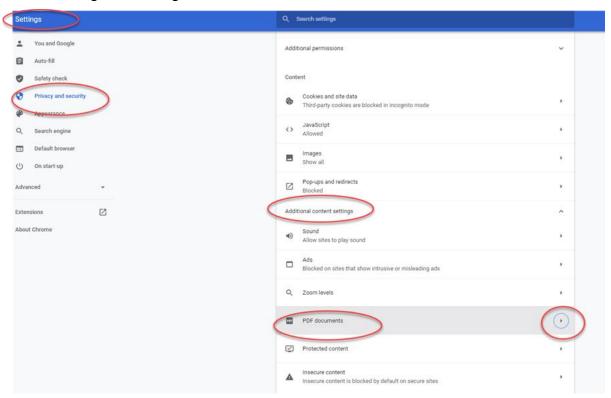
FileOpen will work fully with most browsers. However, Edge and Chrome have inbuild readers, by default. These will not allow the document to open correctly as they do not recognise the additional security on the documents

The solution is to disable this default action.

#### Chrome browser

Click on the 3 dots in the top right of the browser screen, to get the menu up. Then follow the path on the image below.

This will change the setting back to the external reader.

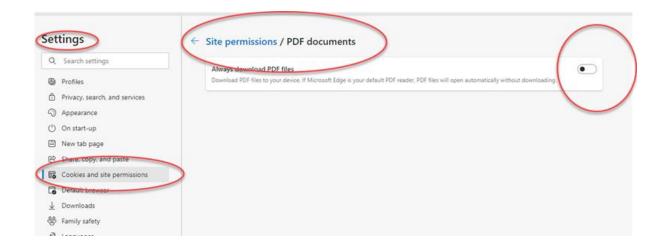






### Edge browser

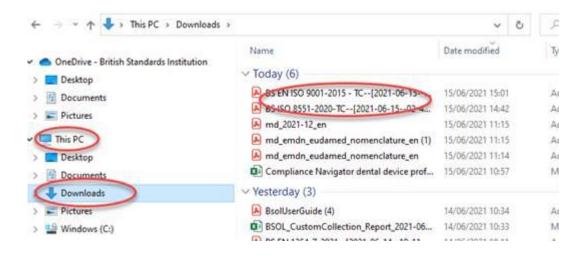
Click on the 3 dots button in the top right, to get the menu up, then follow my path in the image:



This will change the setting back to the external reader.

### Save to a device

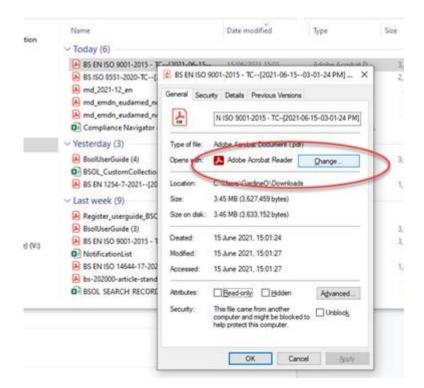
If the standard doesn't open from the download, you can find the file in your c:drive under the heading Downloads





### Default Reader

Find a downloaded pdf, right click on it and select "properties", and you can check the default pdf reader, and change it here. Adobe, Foxit, Bluebeam, etc.



You should now be able to access the standards, as these will download to your computer and open in the external reader.

More information on FileOpen and the DRM security can be found in the Help section in BSOL.





### 3.5 Bibliographic Data

Each standard has information held on a "Bibliographic Data" detail page.

On the results page click on the standard number or click on "View details"





### The **Bibliographic Data Page** contains information such as

- Documents replaced by / replacing this standard
- Amendments made
- Cross references contained within the standard,
- Publication and withdrawal dates,
- Keywords
- Module number
- ICS codes

Areas such as 'Replaces' or 'Replaced by' allow you to see one generation before or after the document you are viewing.

Some document numbers in the Bibliographic Data Page contain hyperlinks to the relevant document referenced. By clicking on these you are redirected to the relevant page associated with the document clicked. The image below shows an example of where you can click to see a previous generation of a standard.

The ICS classification tab holds the ICS tree that the standard belongs to. If you click on the dropdown arrow the menu expands in the ICS classification area. This can be useful for finding standards that may be related



#### 3.6 My Favourites

My Favourites allows you to store documents to download in ZIP file batches, rather than one at a time. You can choose items within the list and download these to your computer as a ZIP file.

Any documents you add to My Favourites will remain there for the rest of your subscription.

My Favourites can be a useful area to add standards that you frequently access so they are on one collated area. It is available to all users who have download rights.

### 3.6.1 Adding standards to My Favourites

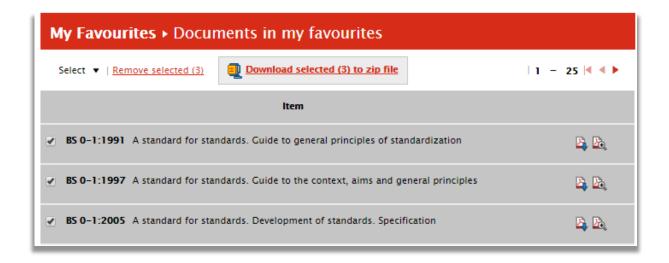
If you wish to add a document from the results page to My Favourites then you simply select the blue arrow, which can be found on the right-hand side of the icons when the search results appear.



In order to view a standard, by download or quick view, the standard must be in your subscription which is indicated by the green notification message below the icons.

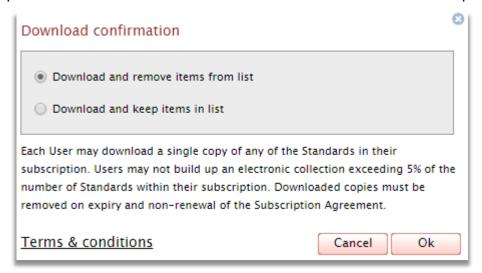
### 3.6.2 Downloading standards from My Favourites

To begin downloading choose the documents to zip by clicking the checkbox next to each document, then press the 'Download selected (xx) to zip file' button.





You will be prompted to choose 'Download and remove from list' or 'Download and keep in list'.



Your documents will be sent to a ZIP file, where you can open or save them. The files are created as ZIP files with an internal catalogue reference. You may wish to rename the files to something which is more relevant to you. To open the zip file double click on the file name. The file will now open in your Adobe Reader.

### 3.7 My Email Alerts - Individual

My Email Alerts is an email notification service which can be used to check and monitor the status of standards held in BSOL. You can add standards to 'My Email Alerts' even if they are not in your Subscription.

There is no limit to the number of email alerts you wish to create. My Email Alerts is available to all users who login to BSOL with an individual username and password.

#### 3.7.1 Creating an Email Alerts List

Select My Email Alerts from the tab at the top of BSOL. Click on 'Create new list' from the left-hand menu.

Once you press on 'Create new list' you will be prompted to choose a name for your list and set the frequency you would like BSOL to check your list; daily, weekly, monthly or you can choose not to receive updates.

Please note, spaces are not accepted in an email alert list name.

If you have Group Email Alerts activated, you will have the option at this stage to choose 'Set as group email alert?' For more information on Group Email Alerts, see <u>3.8 My Email Alerts - Group</u>



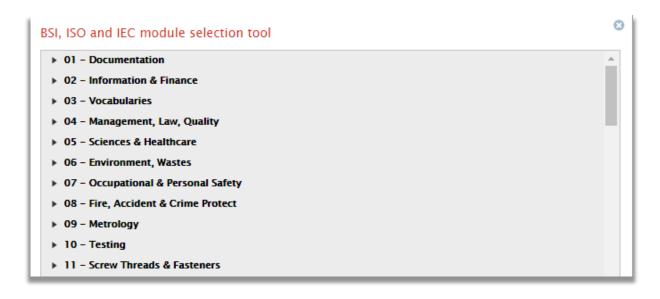
### 3.7.2 Adding modules or ICS codes to your list

Email Alert frequency:	Oaily	<ul><li>Weekly</li></ul>	O Monthly	Off	Last alert sent:
Add documents to list					0
(i) Modules (BSI, ISO & IEC)					Browse
(i) ASTM Modules					Browse
(i) ASME Modules					Browse
(i) ICS code					Browse
( Standard numbers					
				Clear	election Add selection

Adding a module to a list will allow you to track every standard located in the module without having to add standards one by one.

Adding an ICS code to a list will allow you to track every standard associated to that ICS code without having to add standards one by one.

Click Browse next to the relevant field



From here select the Modules / ICS codes you wish to add then press 'Select' at the bottom of the window.

Once you have finished adding your choices to the module field press 'Add selection' to update the list.

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### 3.7.3 Adding Standards to your list

There are two ways to add You can add all individual standards from all publishers (BSI, ISO, IEC, ASTM and ASME) to your list.

- 1. Input the <u>full</u> standard title into the 'Standard numbers' field.
- 2. On a search results page select the Bell symbol next to the standard you want notifications on and select the notifications list you wish to add it too.

🕰 | 🛂 | 🐎 | 🗞 | 🚓 IN YOUR SUBSCRIPTION

Tracked changes documents currently do not inherit the publishing information for the standard series. While we endeavour to make this information accessible, please be sure to add the original version of the standard to your email alerts if you wish to track updates such as supersession information.

### 3.7.4 Batch upload of standards to an Individual Email Alert List

You also have the option to bulk upload several standards to an email alert list at once.

To do this simply put in the standard number and press 'Add Selection'. The formatting will only be accepted if there is a space in between any publishing bodies and the number and year of publishing are combined. See below for an example of correct formatting.



### 3.7.5 Renaming a list

On the My Email Alerts tab select 'view and edit' next to the list you wish to rename.

When you are taken to that specific list you will have a button at the top to 'Rename' the email alert list. Click on this and enter in the new name of the list. Once finished click the 'Save' button to confirm the new name.





### 3.7.6 Manually checking for updates

My Email Alerts can be used to validate updates on documents, perhaps prior to an audit.

You have a list containing all the documents you wish to check, click on the 'Check for updates' in the left of the screen to expand the updates section.

There are two filters available, if you wish to make your search more specific.

- Update type
- Date Range

### 3.7.7 Copy or move documents from different lists

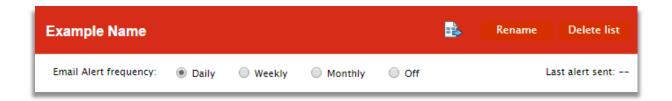
Open the My Email Alerts tab and open the list that you wish to work with by selecting 'View and edit' next to the list name.

Select the items you wish to move or copy. At the bottom of your list of documents check the box that either says 'Copy to' or 'Move to' depending on what function you are trying to complete. Choose the destination from the drop-down menu, then press 'Go'.

### 3.7.8 Change the frequency of the alerts

Navigate to the My Email Alerts tab and open the list you wish to edit.

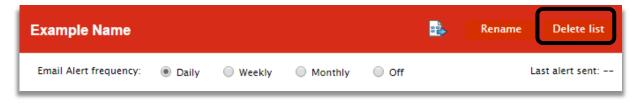
The email frequency buttons are next to the name of the list and can be changed at any time. When you click on a different frequency, it will be automatically updated and a message acknowledging the change will be generated.



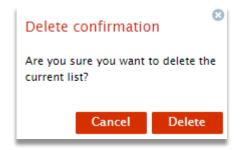


### 3.7.9 Deleting a My Email Alerts list

Navigate to your My Email Alerts list and open the list you wish to edit. From here click on the 'Delete list' button.



This will bring up a prompt confirming that you want to permanently delete this list.



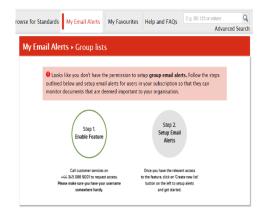
Pressing delete will confirm the action and return you to the My Email Alerts page.

### 3.8 My Email Alerts – Group

Each individual password holder in BSOL can request access to the group list email alert functionality.

### 3.8.1 Activating a Group Email Alert List

In order create and manage a Group Email Alert List, you will need to request access from the BSI Subscription Support Team. For contact details, see <u>6.4 BSI Subscription Support contact details</u>





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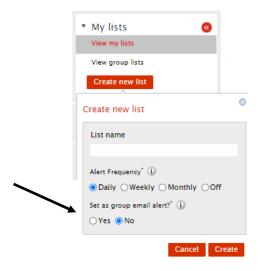


### 3.8.2 Creating a Group Email Alert List

Each user can create and share up to 5 Group lists with the other password holders within your subscription. Anyone added to your Group List will receive the same alerts from these lists that you do.

To create a Group list, follow the same process as an individual Group Email List.; See <u>3.7 My Email Alerts</u> – <u>Individual</u>

When a new list and select Yes on Group email alert:

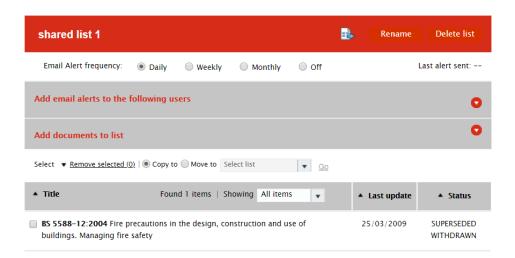


To view or edit a group list, select View Group List in the My Email Alerts tab.

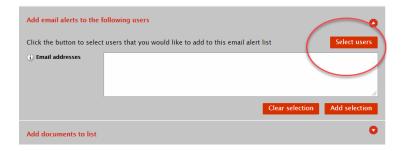


### 3.8.3 Sharing your Group Email Alert List with other users

To add users to your list, open the list and select the area marked: Add email alerts to the following users.



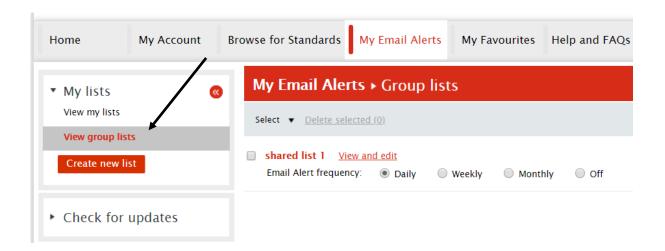
You can manually add email addresses of existing subscribers her, or use **Select Users** to choose from the drop-down A – Z menu



### 3.8.4 Viewing a Group Email Alert List

Your Group lists, or any that have been shared with you, will be visible in this area.





### 3.8.5 Editing a Group Email Alert List

Only the creator of the Group Email lists can edit a list.

See <u>3.7.5 Renaming a list</u>, <u>3.7.7 Copy or move documents from different lists</u> and <u>3.7.8 Change the frequency of the alerts</u>

However, your selected user group will all be able to view your list, within their Group list area and if required, export this list to Excel.

3.8.6 Deleting a Group Email Alert List

See 3.7.9 Deleting a My Email Alerts list





### 4 Types of BSOL Subscriptions

### 4.1 Modular Subscription – Full Collection

The full collection contains over 55,000 British Standards and is the most comprehensive way to ensure you have access to the standards you need. This option is often taken by libraries, universities, larger organizations, and those who work over a wide range of technical fields.

### 4.2 Modular Subscription – Subject based modules

The BSOL database is broken down into 53 standards-based modules. Each module contains all the standards related to a specific subject, and many modules contain thousands of individual standards.

There are also module sets from different publishers available; ASTM, ASME, ISO and IEC.

### 4.3 Custom Collection Subscription

A Custom Collection allows individual standards to be chosen from almost all content with BSOL. The subscription allows the administrator to add standards, at any point through the subscription year, to the Custom Collection, up to the level of documents chosen. Custom Collections are particularly useful when you have need of a smaller number of documents from a wide range of subjects. Custom Collection sizes run from 10 standards up to 500 incrementally.

#### 4.3.1 Custom Collection content

In addition to British Standards, Custom Collections are available for the following publishers ASTM, ASME: BPVC, ASME: Non-BPVC, ISO and IEC. Standards from different publishers/document sets are not permitted within the same Custom Collection.

Only one Custom Collection per publisher is available for a single Subscription. Upgrade options to increase the number of spaces within the Custom Collection are available.

If a document on a Custom Collection is amended, BSOL will automatically replace the document file. However, if a document is revised or superseded the administrator(s) must choose to add the new document, which would require a space to be used in the Custom Collection additional to the original document.

#### 4.3.2 Viewing a Custom Collection subscription

A Custom Collection subscription can be found on the left-hand side of the page under the Home tab.

Click on the subscription name to view the contents of the Custom Collection.

See 3.4 Viewing the standards for further information.



### 4.3.3 Adding standards to your Custom Collection subscription

Only an appointed administrator or administrators have the permission rights to add documents to the Custom Collection.

To do this, search for the document in the normal manner. The document will list as 'Not in subscription'.

If you are the administrator for the subscription you will have an icon for adding documents to a Custom Collection next to the shopping basket. Clicking this symbol will add the document to the collection; you will then get a message confirming that the document has been added to your Custom Collection.

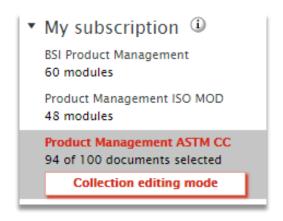


### 4.3.4 Removing documents from a Custom Collection

Standards can be removed from a Custom Collection subscription annually, upon the renewal invoice being cleared.

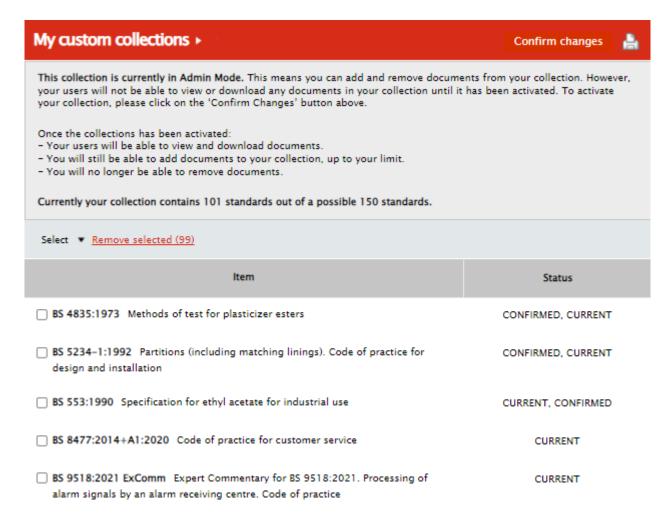
Contact the BSI Subscription Support Team to request the editing mode on your Subscription. For contact details, see <u>6.4 BSI Subscription Support contact details</u>

When the Custom Collection administrator logs into BSOL, you will see the banner underneath the Custom Collection confirming 'Collection editing mode'.

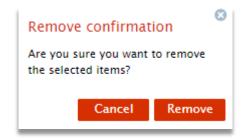




When you select 'Collection editing mode' you will be taken to a list of all current documents within the Custom Collection Subscription. From here, you will be given the option to highlight which standards you want to remove.



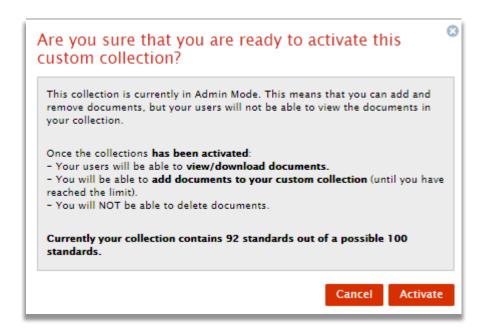
When you have selected the documents you wish to remove, you can press on 'Remove selected'. You will receive a confirmation box before proceeding.



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Once you are finished removing standards from your Custom Collection you can press the 'Confirm changes' button at the top of the page. This will bring up one final confirmation box.



After pressing 'Activate' you will receive a message in the left-hand menu next to your subscription list to confirm the changes. At this point the admin period will finish and documents can once again be accessed as normal.

While the Custom Collection is in editing mode the documents will not be available to view by anyone on your subscription.



### 4.3.5 Requesting a standard not currently in a Custom Collection Subscription

Custom Collection Subscription users can send requests to the Custom Collection administrator to request for documents to be added. This can be actioned from the bibliographic page.



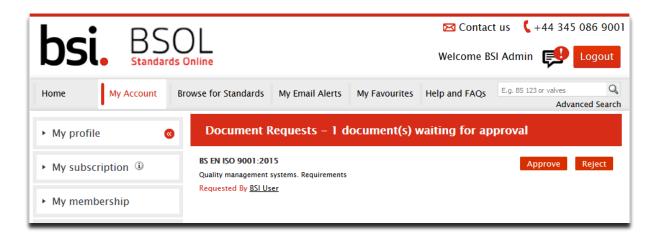
### 4.3.6 Responding to a request to add standards to a Custom Collection Subscription

When a Custom Collection administrator logs into BSOL, there will be a notification on the top right of the page.



If you click on the alert it will allow you to navigate to a page with all the pending requests.

Alternatively, you can navigate to this page by going to My Account and selecting Document Requests from the left-hand menu.



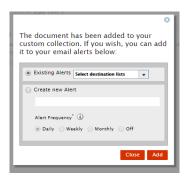
The standard requested will be shown along with the details of the person who submitted the request.

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If the request is approved, a prompt to add the standard to an existing email alert or create a new one. If the standard doesn't need to be added to a list, the notification can be closed.



If the request is rejected, an email alert will be sent to the requestor to confirm the decision. An option will appear to confirm the reason for rejection which will appear in the email alert.





### 4.4 Hardcopy only standards

BSOL is an online digital service containing PDF versions of British Standards and other selected publishers. However, a small number of documents cannot be produced in PDF for BSOL due to the standards containing colour samples, charts or images.

These cannot be included in a BSOL subscription and must be purchased on a one-off basis. See <u>4.4</u> Purchasing a standard not in your Subscription

Standards that are hardcopy only will have a book icon next to the standard number, there will also be a notification under the icons on the right-hand side.



### 4.5 Purchasing a standard not in your Subscription

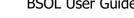
If you wish to purchase a standard that's not in your Subscription, you can purchase via the BSI Shop https://shop.bsigroup.com/

Clicking on the basket icon, which can be found on the right-hand side of the icons when the search results appear, will take you to the standard on the BSI shop.



Alternatively, if you are on the Bibliographic Data page, you can click on the 'Purchase in shop' link which will take you to the standard on the BSI shop.







#### **BSOL Content** 5

### Types of documents within BSOL

There are several types of documents that appear in BSOL, these include standards which are published by BSI, adopted or in the process of adoption by BSI. Certain third-party content publishers are also available; ASME, ASTM, IEC and ISO.

### 5.1.1 BS Documents (British Standards)

BS Standards are published by BSI, there are over 55,000 British Standards to Subscribe to within BSOL.

### 5.1.2 EN Documents (European Standards)

European Standards are technical standards which have been ratified by one of the three European standards organizations: European Committee for Standardization (CEN), European Committee for Electrotechnical Standardization (CENELEC), or European Telecommunications Standards Institute (ETSI).

Any standard produced by CEN and CENELEC must be adopted as a national standard in each member country. Each member country adds their own prefix to the beginning of the document number. In the UK these become BS EN. The content of the document remains the same across each member country, only the source language changes.

#### 5.1.3 prEN Documents

prEN is a draft EN document. These would be present in BSOL for the period that they are available to comment on. After the comments period has expired BSI may remove the document. This would then be replaced by the completed and approved version. At this point its designation would change to BS EN.

### 5.1.4 ISO Documents (International Organization for Standardization)

The International Organization for Standardization (ISO) is an international nongovernmental organization comprising national standards bodies, including BSI, that develops and publishes a wide range of proprietary, industrial, and commercial standards.

### 5.1.5 IEC Documents (International Electrotechnical Commission)

The International Electrotechnical Commission is an international standards organization that prepares and publishes international standards for all electrical, electronic and related technologies. BSI is the UK member.

### 5.1.6 ASTM Documents (American Society for Testing and Materials)

ASTM is a developer of international voluntary consensus standards. ASTM standards are developed by committees of relevant industry professionals who meet regularly in an open and transparent process to deliver standards, test methods, specifications, guides, and practices. ASTM creates many standard procedures governing environmental and engineering services.



### 5.1.7 ASME Documents (The American Society of Mechanical Engineers)

A collection of ASME documents are available on BSOL. ASME documents are split into two sections; BPVC and Non-BPVC. Each section is treated individually, content cannot be combined into single Subscriptions. They are not often adopted by BSI and as such are not included in standard subscriptions.

#### 5.1.8 Draft Documents

For draft documents the "Standard Number" field in BSOL uses the BSI project number, not the standard number that it will become upon completion and publication.

Example - 07/30167174 is the project number

Once this document is published this would become BS EN 61869-2. This final number will only be listed in the Title field and in the bibliography. Once the draft is finalised and published, the "Standard Number" field will be updated, replacing the draft number with its completed and published Standard Number.

To search for a draft, use the draft number (as mentioned above) as a "Standard Number Search", or search using the final document number, but as a "Keyword Search".

### 5.1.9 Tracked Changes (TC) Documents

Tracked changes documents contain both the original document and a tracked changes version. The tracked changes version highlights changes made to the document from the previous edition, with additions highlighted in green and subtractions in red.

#### 5.2 Document statuses

Current: The document is currently applicable

Withdrawn: The document is no longer 'current', and has been withdrawn

Draft for public comment: A new document is under development and this is the latest publicly available document.

Work in hand: There is work being undertaken on this document and there is a related draft for public comment available.

Revised, withdrawn: This document has been revised and replaced by a document with the same core number and is no longer current.

Superseded, withdrawn: This document has been replaced by one or more other documents with a different core number and is no longer current.

Partially Replaced: This document has been partially replaced by one or more other documents.

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Confirmed: This document has been reviewed and confirmed as being current.

Obsolescent: Indicating that the document is not recommended for use for new equipment but needs to be retained to provide for the servicing of equipment that is expected to have a long working life, or due to legislative issues.

Proposed for confirmation: This document is being reviewed and it has been proposed that it is confirmed as current document.

Proposed for obsolescence: This document is being reviewed and it has been proposed that it is made obsolescent.

Proposed for withdrawal: This document is being reviewed and it has been proposed that it is withdrawn.

Current, revised: This document has been revised and replaced by a document with the same core number but remains current for a short time period.

Current, superseded: This document has been replaced by one or more other documents with a different core number remains current for a short time period.

Current, Under Review: The publication is under review (at BSI, CEN or ISO) but no decision has yet been made on the outcome.

Current, Project Underway: There is a project underway to revise this document, but a document has yet to be published

#### 5.3 Conformity to Regulations

Standards can be used to provide a presumption of conformity to regulations.

### 5.3.1 Designated by UK Government

The UK government has 'Designated' standards that, if used, can provide a presumption of conformity to applicable law in Great Britain. Designated standards are identified by the 'Designated' label and can be applied against products, services or processes for use in England, Scotland and Wales. New or revised standards for designation published after 1 January 2021 contain information about the new UK regulations for Great Britain and for Northern Ireland within the national foreword.

Designated standard notification will be shown on the search results page within the standard information and in the Bibliographic data page.









Users should always check the designation status of a standard on the relevant page of the gov.uk website. Note that occasionally a designated standard may also show as "withdrawn": this usually happens when a newer edition of the standard has been published as a British Standard but government has not yet designated the newer version.

### 5.3.2 Cited in the Official Journal of the European Union

The European Commission publishes the references of (or "cites") standards (usually a harmonized standard) in the Official Journal of the EU that, if used, can provide a presumption of conformity to relevant EU legislation. Note also that for Northern Ireland markets EU rules continue to apply. Many of these standards will also have either a ZA or ZZ annex which helps to identify how the standard provides conformity to the applicable EU legislation.

Users should also check the present status of a standard on the relevant webpage on the EU website. As with designated standards in the UK, occasionally a withdrawn standard may also show as cited, and for the same reason.

#### 5.3.3 Further Information

Click here for more information on Standards and regulation

#### 5.4 Standard number formats

If a document begins with ISO or IEC it may not have been adopted by BSI. However, there may be a project underway to adopt this document. In these instances, we may have a draft available in BSOL (not all ISO publications are available in BSOL).

(Approximately 80 to 85% of ISO and IEC documents are adopted by BSI)

Common standard number formats are listed below. Spacing format is important in standards. If you are in doubt as to the lettering format leave this off. You will return results including the document number you were looking for.

When a Standard is adopted from another standards agency, such as CEN (Committee for European Normalisation, who produce EN standards) or ISO (International Standards organisation) or IEC (International Electro-technical Committee), then their lettering prefix must be included in the numbering of the document.

#### Examples:

BS 9999:2008 BS EN 1991-1-4:2005 BS EN ISO/IEC 17021:2006 DD ISO/TS 6733:2006 BS ISO 17712:2010 BS EN 60335-2-27:2010 BS EN ISO 9001:2008 PAS 124:2008 PD CEN ISO/TR 20573:2008 BIP 2207





#### 5.5 BSI standard number prefixes

The following prefixes belong to BSI:

- BS **British Standard**
- DD Draft for Development
- PAS **Publicly Available Specification Business Information Publication** BIP
- PD **Published Document**

#### ICS Classification

International Classification for Standards (ICS) is an international classification system for technical standards.

ICS Codes are designed to cover every economic sector and virtually every activity where technical standard may be used. It is based on a decimal classification system which allows you to build a family tree of subject's classification principles.

The ICS system uses a hierarchical classification, which consists of three levels called: Field (level 1), group (level 2) and sub-group (level 3).

Each field can be subdivided into groups, which can be further divided into sub-groups.

Top-level items, which have no additional levels, use a two-digit notation. For example:

#### 43 Road Vehicle Engineering

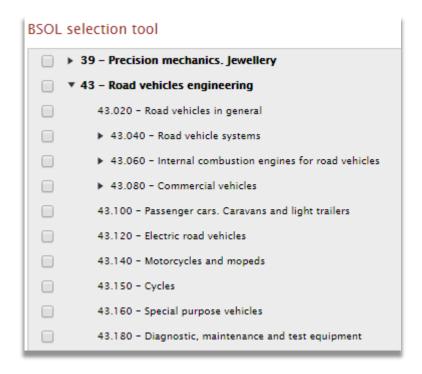


The notations for groups and sub-groups include the parent field-level notations.



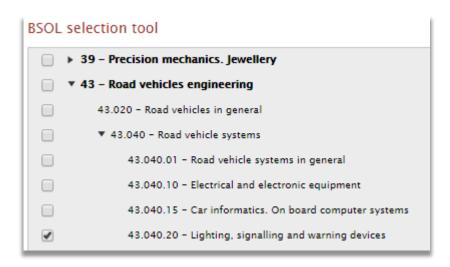
This example below shows field 43 (level 1), group 020 (level 2).

43.020 Road vehicles in general



The example below shows a notation for sub-group 20 (Level 3), which belongs to field 43 (level 1), group 040 (level 2)

43.040.20 Lighting, signalling and warning devices



#### **BSOL** User Guide



### **January 2022 v3**

The ICS has 99 top-level divisions of which only 40 are presently used. The remaining 59 divisions are reserved for topics that are not yet known. At present the ICS system includes these 40 fields.

- 01 General. Terminology. Standardization. Documentation
- 03 Services. Company organization, management and quality. Administration. Transport. Sociology
- 07 Natural and applied sciences
- 11 Health care technology
- 13 Environment. Health protection. Safety
- 17 Metrology and measurement. Physical phenomena
- 19 Testing
- 21 Mechanical systems and components for general use
- 23 Fluid systems and components for general use
- 25 Manufacturing Engineering
- 27 Energy and heat transfer engineering.
- 29 Electrical engineering
- 31 Electronics
- 33 Telecommunications. Audio and video engineering
- 35 Information technology
- 37 Image technology
- 39 Precision mechanics. Jewellery
- 43 Road vehicles engineering
- 45 Railway engineering
- 47 Shipbuilding and marine structures
- 49 Aircraft and space vehicle engineering
- 53 Materials handling equipment
- 55 Packaging and distribution of goods
- 59 Textile and leather technology
- 61 Clothing industry
- 65 Agriculture
- 67 Food technology
- 71 Chemical technology
- 73 Mining and minerals
- 75 Petroleum and related technologies
- 77 Metallurgy
- 79 Wood technology
- 81 Glass and ceramics industries
- 83 Rubber and plastic industries
- 85 Paper technology
- 87 Paint and colour industries
- 91 Construction materials and building
- 93 Civil engineering
- 95 Military affairs. Military engineering. Weapons
- 97 Domestic and commercial equipment. Entertainment. Sports



Each standard is given an ICS code number by the authors of the standard (when the standard is produced), which can be viewing in the bibliographic data area of each document.



#### 5.7 BSOL Modules

The BSOL Modules are made up 53 main subject categories based on the ICS codes.

Subject matter experts at BSI have tried to group the standards to a relevant module. However, standards can appear in several modules if they are relevant to more than one topic area.

**GBM01** Documentation

GBM02 Information & Finance

**GBM03 Vocabularies** 

GBM04 Management, Law, Quality

GBM05 Sciences & Health Care

GBM06 Environment, Wastes

GBM07 Occupational & Personal Safety

GBM08 Fire, Accident & Crime Protection

**GBM09 Metrology** 

**GBM10** Testing

**GBM11 Screw Threads & Fasteners** 

GBM12 Mechanical Systems & Components

**GBM13 Fluid Systems & Components** 

**GBM14 Manufacturing Engineering** 

**GBM15 Metal Treatment & Welding** 

GBM16 Energy & Heat Transfer Engineering

GBM17 Electrical Engineering In General





GBM18 Electrical Components
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GBM19 Electrical Accessories, Switchgear & Controlgear

GBM20 Electric Lamps, Power Generation, Distribution & Storage

GBM21 Electronic Components & Devices

**GBM22 Electromechanical Components** 

**GBM23 Telecommunications** 

GBM24 Information Technology - Software & Networking

GBM25 Information Technology - Hardware & Office Machines

**GBM26 Image Technology** 

GBM27 Road Vehicle Engineering

**GBM28** Railway Engineering

GBM29 Shipbuilding & Marine Structures

GBM30 Aircraft & Aerospace Engineering

**GBM31 Materials For Aerospace Construction** 

GBM32 Aerospace Components & Fasteners

**GBM33 Materials Handling Equipment** 

GBM34 Packaging & Distribution Of Goods

GBM35 Textiles, Leather & Clothing

GBM36 Agriculture & Agricultural Engineering

**GBM37 Food Technology** 

**GBM38 Chemical Technology** 

GBM39 Mining & Petroleum Technologies

GBM40 Metallurgy

**GBM41 Metal Products** 

**GBM42 Wood Technology** 

**GBM43 Glass & Ceramics Industries** 

**GBM44** Rubber Industry

**GBM45 Plastics Industry** 

GBM46 Paper Products & Technology

**GBM47 Paint & Colour Industries** 

**GBM48** Construction In General

GBM49 Building Materials & Components

GBM50 Building Installations & Finishing

GBM51 Civil Engineering

GBM52 Domestic Equipment & Appliances

GBM53 Sports Equipment & Entertainment

**GBM81 Wiring Regulations Collection** 





### 5.8 Update types

Amended - The date the document was last announced as being amended. Select this to find all standards that were last announced as being amended during the period specified using the date criteria.

New - The date when the record was announced as 'new' (this may be different to the publication date). Select this to find all new Standards, (and other items) that were announced as new during the period specified using the date criteria.

Other – A change to the status field of a standard (e.g. if the status changes from 'Current' to 'Proposed for Confirmation'). An "Other" update is an update to the bibliographic information of the standard, NOT to the content of the standard.

Reinstated - The date when the record or document was returned to its current status. It is used when, for instance, a current standard is withdrawn and then later made current again, for whatever reason. Select this to find all standards that were last reinstated to its current status during the period specified using the date criteria.

Withdrawn - The date that the document was announced as withdrawn (the date of the announcement may be different from the actual withdrawal date). Select this to find all standards that were withdrawn during the period specified using the date criteria





### 6 Support

### 6.1 Help and FAQ's

The Help and FAQs section can be access from the top menu and will provide you with support during your BSOL Subscription.

#### 6.1.1 Search within help

The search box has a keyword search function to search all areas of the Help and FAQ pages.

Enter your keyword into the search box 'Search within help'. You can also select a specific area to search in or just leave it on the default of 'All results' to search everything. Click on the 'Search' button to look for results.

Your results will display by topic in the main body of the screen. If results are found from more than one area of the Help and FAQs page, these areas can be filtered using the TICK boxes at the top of the results.

To look at results simply click on the drop-down arrow by the results that are shown on the page.

### 6.1.2 User guide

On this page, you will find a link to this BSOL user guide document.

### 6.1.3 Training

Clicking on this section, will take you to a web-page with help videos and contact details for our Online Training Team.

#### 6.2 BSI Account Manager

As a BSOL Subscriber, you will have a dedicated BSI Account manager. Please contact them if you wish to discuss the following:

- Subscription upgrades
- Subscription renewals
- Subscription content queries

If you are unsure of your BSI Account Manager contact details, please contact BSI Subscription Support who will help you.





### 6.3 BSI Subscription Support

The Subscription Support Team is a dedicated technical team to help you through your BSOL journey. Please contact them if you wish to discuss the following:

- Authentication information or issues
- Issues with logging into BSOL
- Placing a Subscription in editing mode
- Activating a Group Email Alert List
- Issues with Subscription access
- Invoicing queries
- Adding users to a Subscription

### 6.4 BSI Subscription Support contact details

Phone number: 0345 086 8037

Email address: Subscription.support@bsigroup.com





## 7 Revision History

Revision No.	Date	Author	Approved By	Changes
V1	9.12.2021	Carolyn Ellis	Robert Dunn	
V2	16.12.2021	Carolyn Ellis	Daniel Mansfield	Wording for 5.1.2, 5.1.4, 5.1.5, 5.3.1 and 5.3.2.
V3	14.01.2022	Carolyn Ellis	Fraser Hocking	Added a note to confirm spaces are not permitted in email alert list names