

IMPLEMENTATION GUIDE

WELCOME

Thank you for the trust you have placed in us. We're glad you chosen our offering and that we can welcome you as a new customer.

Let's go ahead and start implementing our standards management system, GLOBALnorm, for your company. In this document we've summarized the various tasks, and we invite you to go through them step by step and check them off once they're done.

From page 4 – in the details section – you'll find three boxes next to each task. Here's what they mean:

- Task relevant to you, as stated in your contract and covered by the initial payment – you only need to look at the tasks where the boxes are checked!
- Completed by you – please check the box
- Done by us – we will check the box

In addition, you will make it easier for us to keep track of the current status if you include the date of the current version of your checked guide whenever you send new input. Please also feel free to leave us comments in the PDF if you have questions or comments.

Let's get started!

Best wishes,
Your GLOBALNORM STANDARDS team

We've also included the link to the milestone overview for implementing GLOBALnorm.

PLEASE BEGIN FILLING OUT HERE

Company

Name

Version date of the document

OVERVIEW OF YOUR TASKS

Step 1 – Contract-related tasks

- Check contract documents
- Sign and send back contract documents
- If applicable, cancel other services/subscriptions you no longer need

Step 2 – Provision of required information

- Gather and send required files (see page 4)
- Adjust and send required templates (see page 4/5)
- Fill out and send required forms (see page 5)

Step 3 – Implementation on 3 levels

The software, metadata and full texts are implemented by the GLOBALNORM STANDARDS team. Here, you don't need to do anything else – except perhaps be available in case our team has questions.

Step 4 – Rollout introductory phase

- Learn how to use GLOBALnorm (training session or Quick Guide)
- Test functions, including initial standards purchases, etc.
- Transfer existing monitoring lists
- Enter internal company information
- Set up payment methods
- Provide GLOBALNORM STANDARDS with feedback and perhaps fine-tune one or two details.
- Release GLOBALnorm for all users.

Step 5 – Rollout for all users

- Inform users
- Train users

If you have any questions or need help, simply get in touch!
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DETAILS AND NOTES ON THE INDIVIDUAL STEPS

Step 1 – Contract-related tasks

You will receive our contract in PDF format. Please print two copies, sign them both and send them back to us. We will sign one of them and send it back to you again.

If there are other services that you no longer need following your switch to GLOBALnorm, remember to cancel them in good time. Before your access comes to an end, it's a good idea to save the table of contents of the norms and send it to us. In the case of the Standards Ticker, don't forget to also delete the subscribed standards in your account.

Here you can make a note of notice periods:

Service/subscription	End of contract	Notice period	Cancelled on

If the notice periods allow, the GLOBALNORM team is also happy to take care of all cancellations or contract amendments for you, once you have signed your contract with us. This service is usually included in your initial costs (see contract, Appendix 1B). If that is not the case, they can be invoiced using your timesheet.

Step 2 – Delivery of required information

We need the following information from you, so we can fill the GLOBALnorm software interface with your specific content and adapt it to meet your needs and requirements: The tasks marked with **I** are important for the beginning of the introductory phase (see step 4, page 6) and should ideally be completed first.

Files

By sending the files you are also giving your consent for us to store them on our server and transfer them into the GLOBALnorm software.

- Company logo for web/screen** **I**
File format: PNG or JPG, color mode: RGB, file size: at least 190 px wide
- Terms of use on company letterhead** **I**
File format: PDF (see 2C on this page)
- Existing full-text standards, and company standards if applicable**
File format: PDF (see 2I and 2J on page 5)

If you prefer to receive all templates and forms in one ZIP file, click here!

Templates

To make your work easier, we've created templates for certain content that you can use for orientation. In some templates you'll also find helpful best-practice examples. You can open each template by simply clicking on its name.

- 2A // Template Company Info (XLS)** **I**
This information will be displayed in the left column under the GLOBALnorm logo and is intended to address your users. You'll find specific suggestions for user-friendly content in the template.
- 2B // Template Welcome Mail (XLS)** **I**
GLOBALnorm will send this email to users once you have released the system. It contains the link to log in and the individual access data. In the template we've summarized other information that could be important for users.
- 2C // Template Terms of Use (XLS)** **I**
To increase your users' awareness for using the software and the valuable data it contains responsibly, we recommend that you display the terms of use for every user to read and confirm.
- 2D // Template User Import Matrix (XLS)** **I**
Here you tell us the planned users of the software with the necessary contact details, plus required roles and functions.

- 2E // Template Technical Details (XLS)** ⓘ
To ensure that we provide the software in a secure way, we only release it to the IP addresses that you tell us here. If you've decided to go with the convenient Single Sign-On (SSO) option, you'll need to give us the relevant details for that, too.
- 2F // Template Monitoring Import Matrix (XLS)**
Here you can tell us your individual structure for monitoring standards lists – e.g. sorted by subject area, project, product name or group, ICS class, based on the declarations of conformity of your individual products, or by your accredited scope.
- 2G // Template Company-Specific Information Import Matrix (XLS)**
If you want to give your users internal, company-specific instructions for certain documents/standards – e.g. that Section X Standard Y is not used for the following reasons – you can put them in this template.
- 2H // Template Full-Text Information (XLS)**
So that you can receive the full texts via GLOBALnorm in the future, we need all information about existing licenses and planned changes to license models, if applicable. Based on that information we analyze and optimize the procurement for you.
- 2I // Template Full-Text Import Matrix (XLS)**
We can integrate your existing full-text standards into the software if you give us the corresponding document names and files (see above, under Files).
- 2J // Template Company Standards Import Matrix (XLS)**
We can also integrate company-specific standards or other specifications into GLOBALnorm if you send us the relevant metadata and/or hyperlinks to the company standards on your server.

Forms

By filling out the following forms you can make further adjustments to your requirements and needs.

- 2K // Form CE Selection (PDF)**
Here you can select up to six EU legal provisions that will be displayed right at the top, under CE STANDARDS LISTS.
- 2L // Form Statistics (PDF)**
On request we can provide you with an overview of the user- and document-related activities selected here, in XLS format. That gives you meaningful statistics for internal purposes or for reporting to company management.
- 2M // Form Customer Reference Consent (PDF)**
Here, you allow us to name your company as a reference customer for our standards management system. You specify the format and the medium!

Step 4 – Rollout introductory phase

After completing the tasks marked 1 you can start the introductory phase in your company. For this phase you have defined some users for the initial group (administrators, order processors and frequent users) in the user import matrix. These users can now log in to GLOBALnorm and start familiarizing themselves with it. We are happy to provide extensive training to support users at the beginning.

The goal of the introductory phase is to check all the functions, and to enter all relevant information and company-specific notes to make sure everything runs smoothly.

That includes payment information. We recommend giving us two purchase order (PO) numbers: one for the annual license for the GLOBALnorm contract, and one for a budget for purchasing additional standards and services throughout the year.

After completing a successful test phase, training the initial group, and giving your final approval, there's nothing to stop the 'big' rollout.

	Calendar week	Specific date	Time period
Date rollout introductory phase	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Date	Name	Signature
GLOBALnorm approved!	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 5 – Rollout for all users

After steps 1-4 have been completed and you have given your approval, welcome mails will be sent to all users.

	Calendar week	Specific date	Time period
Date Rollout for all users	<input type="text"/>	<input type="text"/>	<input type="text"/>

From now on, all users in your company can benefit from the efficient standards management system and research or monitor standards, access existing full texts or order new ones – as long as they have received thorough training and are motivated to start.

AND THEN?

Once you have implemented the software, it can still be adjusted at any time if the situation changes. Nothing is set in stone, and we often find that that, after the initial familiarization phase, users have one or two requirements that would make their work with standards easier.

Services like this are mostly charged using a timesheet as agreed in your contract. If larger adjustments or enhancements are necessary, we'll be glad to send you a quote.

User management

As employees come and go, there'll be a need to create new users, delete old ones or change names. You can either send us information about these changes as they come up, or you can bundle them and send them to us at regular intervals – whatever suits you best.

User satisfaction

The new standards management system is implemented and you've been working with it for a few months. Did the changeover process go well? Have things become simpler, as you hoped? Are all users happy and content? Or do you have comments or ideas? We'll be glad to help you create a user survey. You can also gain valuable insights from the user evaluation in the GLOBALnorm statistics (see 2L on page 5).

Data packages

Is your company growing, along with your product portfolio and the list of relevant standards? If you want to integrate more regulatory bodies or additional data fields into GLOBALnorm, just let us know.

Audit-ready

When you work with GLOBALnorm you have nothing to worry about when it comes to the documentation requirement in line with IATF 16949, DIN EN ISO 9001, DIN EN ISO 13485 or DIN EN ISO/IEC 1702. The relevant quality management systems define a requirement to have a system to update and monitor sets of regulations (standards, technical rules, legal provisions). Our standards managements system allows you to easily demonstrate that you comply with the latest requirements in line with the recognized technical rules. Let us know when the next (re-)audit is coming up and you need support!

You can find more information about GLOBALnorm [here!](#)