



# IRIS CERTIFICATION® COMPANY MASTER DATA

| Date       | Revision number         |
|------------|-------------------------|
| 05/02/2024 | Initial version - rev00 |
| 29/02/2024 | Updated version – rev01 |
| 01/03/2024 | Updated version – rev02 |

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THE EUROPEAN RAIL INDUSTRY

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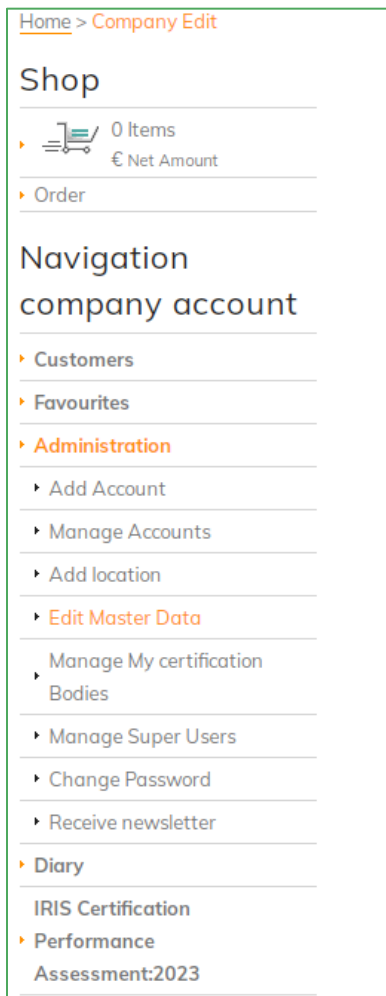
## 1 Introduction

This document aims to explain the IRIS Certification® Rev.04 specificities of the company master data, company diary and data package upload.

## 2 Company Master Data

The company master data is one of the most important areas in the IRIS Portal as it provides many inputs for the IRIS Certification process.

The company master data can be found by logging into the IRIS Portal with your username and password, followed by navigating to the administration area and selecting edit master data:



## 2.1 Certification activities and business categories

**Note: The screenshots illustrated below are fake examples, please adapt to your own situation.**

Currently certified organizations are able to view their equivalent rev.04 certification activities. If you wish to update these, please send an email to: [info@iris-rail.org](mailto:info@iris-rail.org)

|  |   |
|--|---|
| Select your certification activities in the rail business: * | <input type="checkbox"/> Design and Development<br><input checked="" type="checkbox"/> Production & Service provision<br><input type="checkbox"/> EPPS<br><input checked="" type="checkbox"/> Project Management<br><input checked="" type="checkbox"/> Requirements Management |
|--|---|

All organizations are able to update their business categories directly in the company master data.

|   |  |
|---|--|
| Select your business categories in the rail business: * | <input type="checkbox"/> Rolling stock<br><input checked="" type="checkbox"/> Signalling<br><input type="checkbox"/> Infrastructure<br><input checked="" type="checkbox"/> Maintenance<br><input checked="" type="checkbox"/> Distributors<br><input type="checkbox"/> Turnkey<br><input type="checkbox"/> Testing & Tools |
|---|--|

## 2.2 Simplified Approach

It is now required to make a selection regarding your staff headcount and turnover.

There are four options that concern the total staff headcount:

|   |  |
|---|--|
| Staff Headcount: *  | <div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Please choose! ▼</div> <div style="padding: 2px;">Please choose!</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Less or equal to 10</div> <div style="padding: 2px;">Less or equal to 45</div> <div style="padding: 2px;">Less or equal to 85</div> <div style="padding: 2px;">More than or equal to 86</div> </div> |
| Turnover (in Million €): *                                  |  |
| Assessment :  |  |
| Remote Functions &  |  |
| <a href="#">Manage Remote Functions and Site Extensions</a> |  |

There are four options that concern the total turnover:

|  |                          |
|--|--------------------------|
| Turnover (in Million €): *   | Less or equal to 10      |
| Your company is eligible for a limited IRIS assessment. Please select your assessment: | Please choose!           |
|  | Less or equal to 2       |
|  | Less or equal to 10      |
|  | Less or equal to 25      |
|  | More than or equal to 26 |

Depending on the selections made in both the staff headcount and turnover, you may or may not have eligibility to select your preferred assessment type:

|  |            |
|--|------------|
| Your company is eligible for a limited IRIS assessment. Please select your assessment: | Simplified |
|  | Full       |
|  | Simplified |

For example, if you have more than 86 staff or a turnover greater than 26 million, then you're not able to select the simplified approach:

|                            |                          |
|----------------------------|--------------------------|
| Staff Headcount: *         | More than or equal to 86 |
| Turnover (in Million €): * | More than or equal to 26 |
| Assessment :               | Full                     |

Be aware that adapting between the two assessment types is only possible during a re-certification audit.

## 2.3 Project Management

There are three choice to select here, please select the one most applicable to your organization. Please select the upper PM if your organization practices multiple PM approaches.

|  |                       |
|--|-----------------------|
| Select your project management set-up: * | Select PM             |
| Is Leading Function:                     | Select PM             |
|  | Engineer to order (A) |
|  | Make to order (B)     |
|  | Make to stock (C)     |
| Describe your products for the           |                       |

### 3 Company Diary


The company diary is a new feature that allows you to view all audits that you have planned with your certification body. It includes a group of information linked to the specific audit.

The company diary can be found by logging into the IRIS Portal with your username and password, followed by navigating to the administration area and selecting edit diary:

[Home](#) > [Company Diary](#)

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### Shop

 0 Items  
€ Net Amount

---

Order

---

### Navigation

#### company account

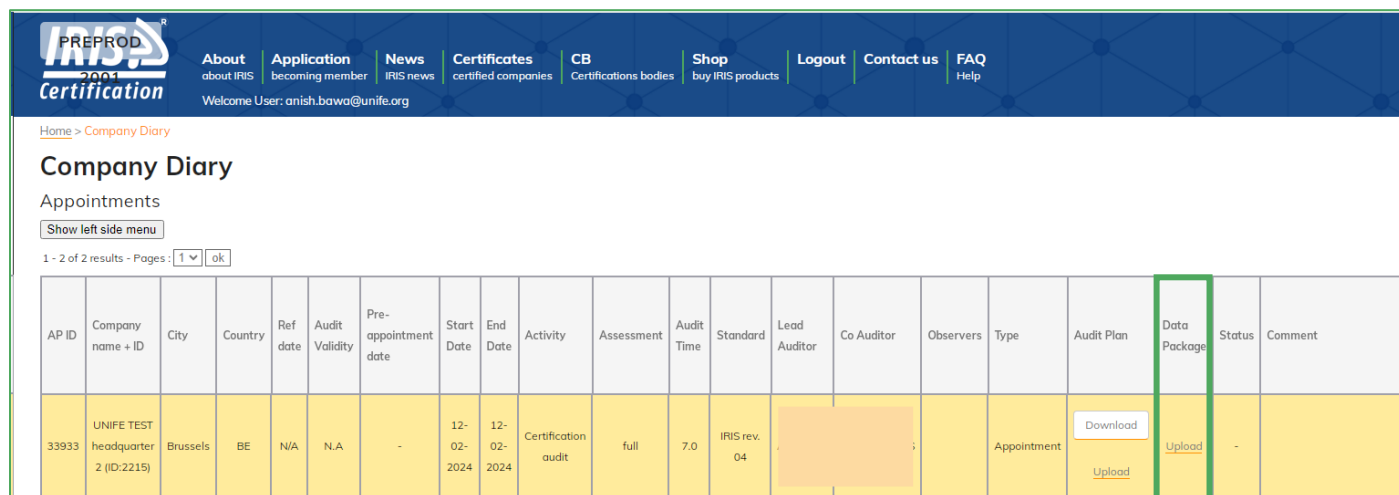
- Customers
- Favourites
- Administration
- Diary**

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IRIS Certification

- Performance
- Assessment:2023

After you select diary, you will see the below page filled with your audits:



Home > Company Diary

### Company Diary

Appointments

Show left side menu

1 - 2 of 2 results - Pages: 1 | ok

| AP ID | Company name + ID                  | City     | Country | Ref date | Audit Validity | Pre-appointment date | Start Date | End Date   | Activity            | Assessment | Audit Time | Standard     | Lead Auditor | Co Auditor | Observers | Type        | Audit Plan         | Data Package | Status | Comment |
|-------|------------------------------------|----------|---------|----------|----------------|----------------------|------------|------------|---------------------|------------|------------|--------------|--------------|------------|-----------|-------------|--------------------|--------------|--------|---------|
| 33933 | UNIFE TEST headquarter 2 (ID:2215) | Brussels | BE      | N/A      | N.A            | -                    | 12-02-2024 | 12-02-2024 | Certification audit | full       | 7.0        | IRIS rev. 04 |              |            |           | Appointment | Download<br>Upload | Upload       | -      |         |

## 4 Data package

For each appointment, an area containing a button called data package is available (see above marked in green).

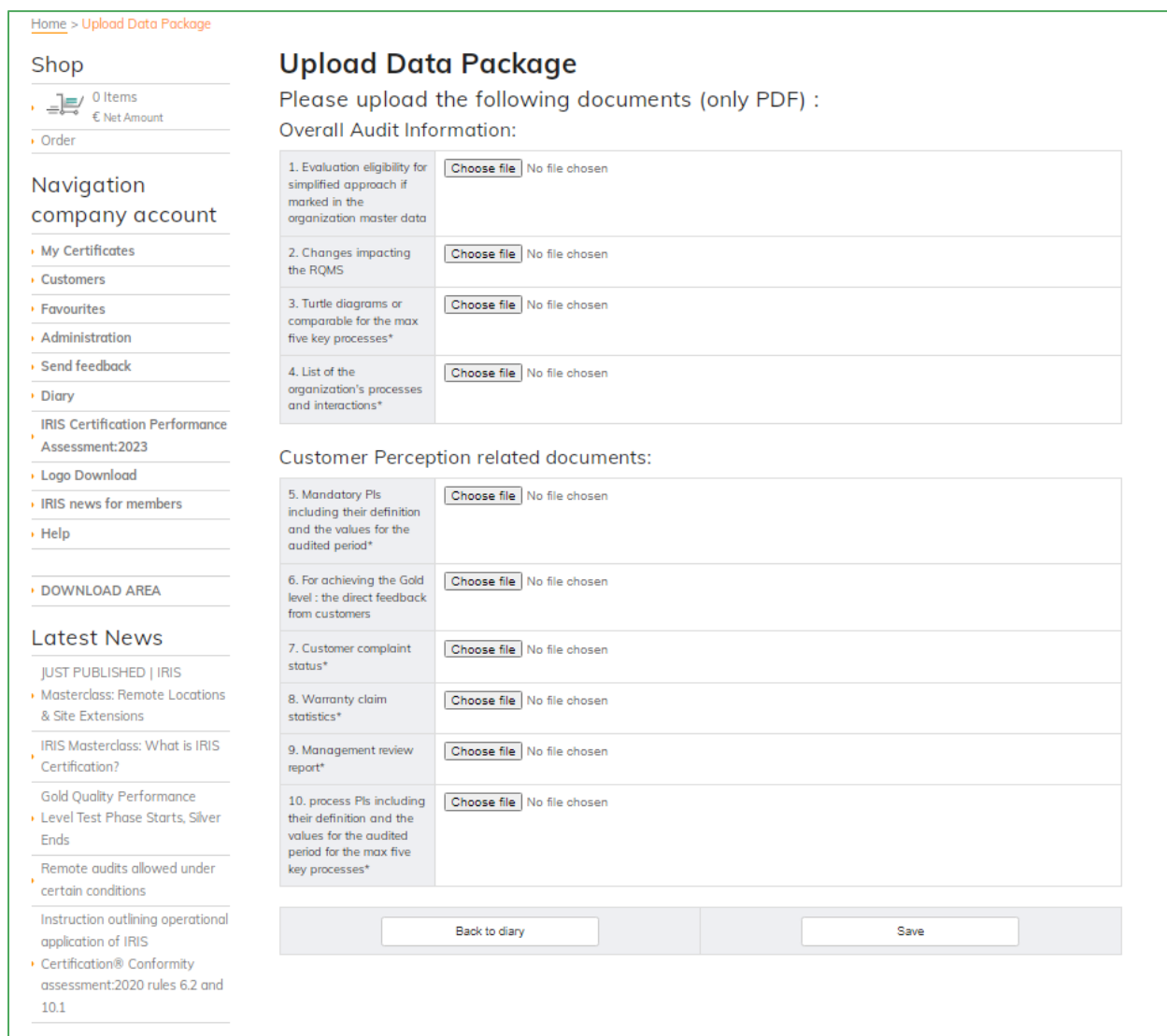
Once clicked, a page shall open to show the list and allow the upload of the 10 documents to be considered in the data package.

The 10 documents are the following:

- **Overall Audit Information:**
  1. Evaluation eligibility for simplified approach,
  2. Changes impacting the RQMS,
  3. Turtle diagrams or comparable for the max five key processes\*,
  4. List of organization's processes and interactions\*,
- **Customer Perception related documents:**
  5. Mandatory PIs including their definition and the values for the audited period\*,
  6. For achieving the Gold level: the direct feedback from customers
  7. Customer complaint status\*,
  8. Warranty claim statistics\*,
  9. Management review report\*,
  10. Process PIs including their definition and the values for the audited period for the max five key processes\*.

\* Refers to the fact that the file is mandatory.

This data package consists of 10 different types of documents. There will be one upload operation by document type. As a result, the company will need to do 10 uploads:



[Home](#) > [Upload Data Package](#)

### Shop

0 Items  
€ Net Amount

Order

### Navigation company account

- My Certificates
- Customers
- Favourites
- Administration
- Send feedback
- Diary
- IRIS Certification Performance Assessment:2023
- Logo Download
- IRIS news for members
- Help

DOWNLOAD AREA

### Latest News

JUST PUBLISHED | IRIS

- Masterclass: Remote Locations & Site Extensions
- IRIS Masterclass: What is IRIS Certification?
- Gold Quality Performance Level Test Phase Starts, Silver Ends
- Remote audits allowed under certain conditions
- Instruction outlining operational application of IRIS
- Certification® Conformity assessment:2020 rules 6.2 and 10.1

## Upload Data Package

Please upload the following documents (only PDF) :

Overall Audit Information:

|   |   |
|---|---|
| 1. Evaluation eligibility for simplified approach if marked in the organization master data | <input type="button" value="Choose file"/> No file chosen |
| 2. Changes impacting the RQMS   | <input type="button" value="Choose file"/> No file chosen |
| 3. Turtle diagrams or comparable for the max five key processes*                            | <input type="button" value="Choose file"/> No file chosen |
| 4. List of the organization's processes and interactions*                                   | <input type="button" value="Choose file"/> No file chosen |

Customer Perception related documents:

|  |   |
|--|---|
| 5. Mandatory PIs including their definition and the values for the audited period*                               | <input type="button" value="Choose file"/> No file chosen |
| 6. For achieving the Gold level : the direct feedback from customers   | <input type="button" value="Choose file"/> No file chosen |
| 7. Customer complaint status*  | <input type="button" value="Choose file"/> No file chosen |
| 8. Warranty claim statistics*  | <input type="button" value="Choose file"/> No file chosen |
| 9. Management review report*   | <input type="button" value="Choose file"/> No file chosen |
| 10. process PIs including their definition and the values for the audited period for the max five key processes* | <input type="button" value="Choose file"/> No file chosen |

There will be one file uploaded by document type. Uploading a new file for a same document type will replace the uploaded file. Compressed files containing several files will not be allowed. Only PDF files will be allowed with a max file size: 15 MB.

As long as the Company has not marked the global upload as "Completed", it can replace an uploaded document by another, latest 60 days before the audit.

Once all documents are uploaded, the Company needs to mark the global upload as "Completed".



### Upload Data Package

Files uploaded

Please upload the following documents (only PDF) :

Overall Audit Information:

|   |   |  |
|---|---|--|
| 1. Evaluation eligibility for simplified approach if marked in the organization master data | <input type="button" value="Choose file"/> No file chosen | <a href="#">simplified_approach_33033.pdf</a>    |
| 2. Changes impacting the RQMS   | <input type="button" value="Choose file"/> No file chosen | <a href="#">rqms_33033.pdf</a>                   |
| 3. Turtle diagrams or comparable for the max five key processes*                            | <input type="button" value="Choose file"/> No file chosen | <a href="#">turtle_diagrams_33033.pdf</a>        |
| 4. List of the organization's processes and interactions*                                   | <input type="button" value="Choose file"/> No file chosen | <a href="#">organization_processes_33033.pdf</a> |

Customer Perception related documents:

|  |   |   |
|--|---|---|
| 5. Mandatory PIs including their definition and the values for the audited period*                               | <input type="button" value="Choose file"/> No file chosen | <a href="#">mandatory_pis_33033.pdf</a>       |
| 6. For achieving the Gold level : the direct feedback from customers   | <input type="button" value="Choose file"/> No file chosen | <a href="#">customers_feedback_33033.pdf</a>  |
| 7. Customer complaint status*  | <input type="button" value="Choose file"/> No file chosen | <a href="#">customers_complaint_33033.pdf</a> |
| 8. Warranty claim statistics*  | <input type="button" value="Choose file"/> No file chosen | <a href="#">warranty_claim_33033.pdf</a>      |
| 9. Management review report*   | <input type="button" value="Choose file"/> No file chosen | <a href="#">review_report_33033.pdf</a>       |
| 10. process PIs including their definition and the values for the audited period for the max five key processes* | <input type="button" value="Choose file"/> No file chosen | <a href="#">process_pis_33033.pdf</a>         |

- Once the global upload is marked as "Completed":
- The Certification Body & Lead Auditor need to, in their respective Portal:
    - See that documents are uploaded,
    - See that the global upload is "Completed",
    - Download the uploaded documents.

The uploaded documents will be automatically and physically deleted from the Portal:

- Once a successful audit is completed, validated and uploaded in the Portal,
- 90 days after the audit has been uploaded with result “failed”.

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*Certification*