

ISOPlanner for consultants

Introduction

ISOPlanner is a Microsoft 365 extension that helps organizations to structure documentation and tasks relating to the implementation of ISO standards.

In this application it is possible to select consultants who can gain management access to ISOPlanner with a free license.

This document provides the instructions on how to set up this access to ISOPlanner for the consultant.

Step 1: inviting the consultant as a guest user in Active Directory

Who: IT department of the customer

In Active Directory of the customer, invite the consultant for a guest account with their own external e-mail address.

For example: organization Contoso invites consultant mark@iso-consultancy.com as a guest user in Active Directory.

Step 2: give access to the relevant SharePoint site to the consultant

Who: IT department of the customer

Give the consultant read (and write access when needed) to the SharePoint site(s) where the ISO documentation resides.

For example: give mark@iso-consultancy.com access to SharePoint site "ISO".

Step 3: accepting guest user access by the consultant

Who: Consultant

For example: mark@iso-consultancy.com receives an e-mail that they are invited for a guest account at organization Contoso. They click to accept this invitation in the e-mail.

Step 4: enabling ISOPlanner for the consultant

Who: Consultant

Go to <https://portal.isoplanner.app/start> and sign in with your own Microsoft e-mail address.

For example: go to the URL and log in with mark@iso-consultancy.com

Step 5: identify yourself as a consultant with ISOPlanner

Who: Consultant

Send an e-mail to support@isoplanner.app with the name of the organization you're consulting for.

For example: from mark@iso-consultancy.com send an email to support@isoplanner.app saying you're consulting for organization Contoso.

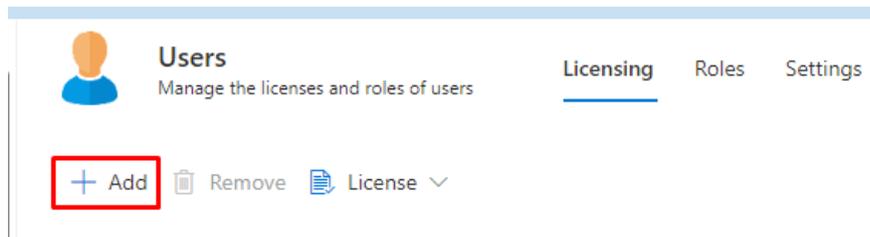
Our Servicedesk will assign a free Partner license to the consultant and end the trial period.

Step 6: assigning license to the consultant

Who: IT department of the customer or ISOPlanner administrator of the customer

This step is only possible when step 6 has been completed.

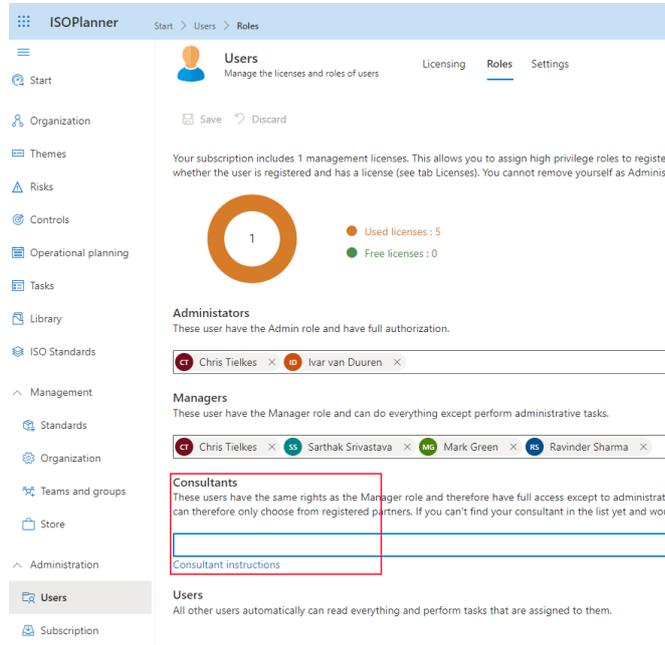
In ISOPlanner, under Administration -> Users, add a user and select the consultant.



Step 7: select the consultant for a free license

Who: IT department of the customer or ISOPlanner administrator of the customer

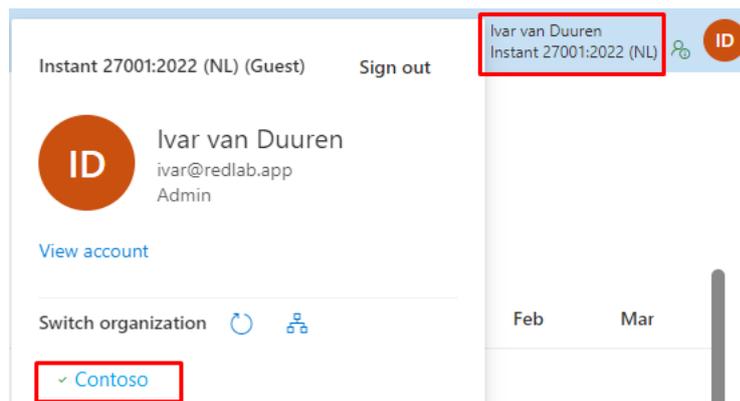
In ISOPlanner, under Administration -> Users -> Roles, find and choose the consultant in the *Consultants* section.



For example: the ISOPlanner administrator chooses mark@iso-consultancy.com as the consultant.

Step 8: switch to the customer tenant

Who: Consultant



In ISOPlanner, click on your name in the top right and select to organization you're consulting for.

You are now ready to work together in ISOPlanner!