

Managing Assignments

Nasdaq Metrio Framework & Disclosure Management (FDM) simplifies the process of ESG data capture, engagement, oversight, and disclosure.

FDM access and visibility is based on user roles. Customer Administrators and Owners can manage user and team assignments; however, Owners only have access to the data requests to which Customer Administrators have assigned them.

Getting Started

Assignments are made from the Tasks tab of the Assignments page. You may customize your view by selecting filters from the top of the page.

The screenshot shows the 'Assignments' page with the 'Tasks' tab selected. A filter bar at the top includes dropdowns for Framework #, Name, Parent Category, ESG Topic, ESG Subtopic, Framework Name, Owner, Contributor, Approver, Reviewer, and Viewer. A 'CLEAR FILTERS' button is also present. Below the filter bar is a table with columns: NAME, PARENT CATEGORY, ESG TOPIC, FRAMEWORK NAME, OWNER, CONTRIBUTOR, APPROVER, REVIEWER, and VIEWER. The table contains several rows of assignment data. Two callout boxes are present: one pointing to the 'Parent Category' dropdown with the text 'Parent Category is the category name provided by the frameworks.', and another pointing to the 'ESG Topic' and 'ESG Subtopic' dropdowns with the text 'These filters are helpful in bulk assigning subject matter experts to data requests within a particular topic.'

Click on a data request name under the Name column to display the Assignments flyout.

<input type="checkbox"/>	NAME	PARENT CATEGORY	ESG TOPIC	FRAMEWORK NAME	OWNER	CONTRIBUTOR	APPROVER	REVIEWER	VIEWER
<input type="checkbox"/>	1 of 3 Emerging Risks	Risk & Crisis Managem...	Governance Governance - Manage...	S&P Global CSA (DJSI)	-	-	-	-	-

Assignments Flyout

Use the dropdown menu or search bar to select users for all applicable roles.

Important: Be sure to complete all assignments for an individual data request before saving. If a user submits a data request for approval and there is no Approver or Reviewer assigned, the data request will skip steps in the workflow and be automatically moved to Review Complete status. The only way to undo this and restart the workflow is to clear all assignments for that data request.

Assignments [Close]

1.4.3
Emerging Risks

Assignments | Data Request Details

Owner [Clear All Assignments]

Jodi Lane [Dropdown]

Contributor

Jane Smith [X] Jack Brown [X] [X]

Approver

Search for users or teams [X] [Dropdown]

1. Jordan Johnson [X]

2. Joy Sparks [X]

Reviewer

Jason Young [X] Jill White [X] [X] [Dropdown]

Viewer

Jennifer Lee [X] [Dropdown]

Send email to new assignees

SAVE ASSIGNMENTS

CLOSE

Callouts:

- Note: There can only be one user assigned to the Owner role per data request. This field will be grayed out and uneditable for Owners.
- Click Clear All Assignments to remove all user assignments from the data request.
- To remove assignments individually, click the x next to the appropriate user.
- Click the x to remove all assignments within one role type.
- Approvers can be assigned in a particular order depending on who you want to address the data request first. Click and drag the grid icon to rearrange to your preferred order.
- By default, each new assignee will receive an email notification regarding their assignment. Deselect the checkbox if you wish to skip this step.

Click Save Assignments to finalize assignments or Close to exit.

To remove assignments, **click** Clear Assignments. If a data request has already been submitted for approval, the following system prompt will appear asking if you are sure you want to take this action. **Click** Yes or Cancel to exit. Clearing assignments is the only way to restart the workflow and remove an approval from an approved data request. This action does **not** clear the existing data.

There are items already in progress:

Changing the assignments will restart the question answering process for the following frameworks. Do you want to proceed?

- CDP Climate Change

[CANCEL](#) [YES](#)

To create or clear assignments in bulk, **select** the checkboxes to the left of each data request. Once you have selected more than one data request, two additional options display below the filters.

Assignments

Tasks
Users

Framework #

Approver

Name

Reviewer

Parent Category

Viewer

ESG Topic

[CLEAR FILTERS](#)

ESG Subtopic

Framework Name

Owner

Contributor

9 selected

CLEAR ASSIGNMENTS
BULK ASSIGN

X Dismiss

<input type="checkbox"/>	NAME	PARENT CATEGORY	ESG TOPIC	FRAMEWORK NAME	OWNER	CONTRIBUTOR	APPROVER	REVIEWER	VIEWER
<input checked="" type="checkbox"/>	C1.3 (C1.3) Do you provide I...	Employee incentives	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C1.3a (C1.3a) Provide further...	Employee incentives	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.1 (C2.1) Does your organ...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.1a (C2.1a) How does your...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.1b (C2.1b) How does your...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.2 (C2.2) Describe your pr...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.2a (C2.2a) Which risk typ...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.2g (C2.2g) Why does your...	Management processes	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-
<input checked="" type="checkbox"/>	C2.3 (C2.3) Have you identi...	Risk disclosure	Governance Governance - Manage...	CDP Climate Change	-	-	-	-	-

Click to deselect all data requests.

To assign the same users to multiple data requests, **click** Bulk Assign.

In the Assignments flyout, **select** Append if you wish to add more users to the existing assignments or **select** Override if you wish to replace all currently assigned users. Use the dropdown menu or search bar to select users for all applicable roles.

Assignments

Selected 9 Data Requests

Bulk Edit Options

Append
This will **add** any new assignees you save to the current assignments

Override
This will **replace all** current assignments you have

Contributor

Approver

Reviewer

Viewer

Send email to new assignees

SAVE ASSIGNMENTS

CLOSE

Assignments

Selected 9 Data Requests

Bulk Edit Options

Append
This will **add** any new assignees you save to the current assignments

Override
This will **replace all** current assignments you have

Owner

Contributor

Approver

Reviewer

Viewer

Send email to new assignees

SAVE ASSIGNMENTS

CLOSE

Click Save Assignments to finalize assignments or Close to exit.

To remove all users from multiple data requests, **select** the checkboxes to the left of each data request and **click** Clear Assignments. This action automatically sends an email notification to all impacted users.

Assignments

Tasks Users

Framework #	Name	Parent Category	ESG Topic	ESG Subtopic	Framework Name	Owner	Contributor
Approver	Reviewer	Viewer	CLEAR FILTERS				

9 selected

CLEAR ASSIGNMENTS BULK ASSIGN X Dismiss

The following system prompt will appear asking if you are sure you want to take this action. **Click** Clear or Cancel to exit.

Clearing Assignments

You have chosen to clear assignments across multiple categories. This will reset items currently in progress. Are you sure you want to make this change?

CANCEL

CLEAR

Need Help?

Nasdaq Metrio Support: 802.251.0500 | NasdaqMetrioSupport@nasdaq.com