

A special edition newsletter for our CABs and assessors

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Welcome

This special edition has been prepared for all external users of the new customer relationship management (CRM) system that went live in November 2016. This is to give you an update on the CRM and the progress to date and what you can expect in the coming months.

The INAB CRM will be accessible to INAB staff, conformity assessment bodies (CABs) and assessors to progress the application and maintenance of accreditation online. INAB has worked hard to develop and design an IT tool to support and streamline the accreditation process.

A special thank you to the CRM team, Sinead Guckian, Andrew Stratford, Orla Ivers and Jonathan Carson from INAB and the members of the HSA IT department who have been part of the design and development since the project commenced in December 2015. Since its launch in November 2016, the team has continued to support the roll out to our users, both internally and externally.

We look forward to your support and co-operation as we roll out the system to all our users; this is a significant change for us all. We are moving from a database that once stored static information on our clients, to a system that manages the full accreditation and maintenance process online.

WHAT IS THE INAB CRM?

In December 2015, INAB contracted Version 1 following a tender process, to provide a database system. A new customer relationship management system (CRM), based on Microsoft Dynamics and Azure portal software was proposed to manage our requirements.

This new system was designed and developed to *manage INAB data and processes associated with the accreditation and management of our Conformity Assessment Bodies.*

The scope of the system included our CABs, and assessors who provide the expertise on which accreditation depends. Previously email and ShareFile were the only IT systems managing the interactions between the assessment teams and the CABs.

The INAB CRM will now manage the accreditation processes allowing all interactions between the team and the CAB through secure portals.

WHAT CAN YOU EXPECT FROM THE INAB CRM?

What can you expect as a CAB?

- All new applications for accreditation will be made online.
- Applications for extension/amendment to scope can only be made online if your scope has been uploaded to the system; if it hasn't, then the extension to scope application form must continue to be used
- You will be notified of the team and visit plan online.
- All documents required for the visit will be available online for the team.

- The management of post visit activities including reporting, clearance of non-conformities, award of accreditation and the ongoing maintenance of your accreditation will be managed in the system.
- Receipt of notifications of annual management fees; reminders for payments.

What can you expect as an assessor?

- You will be invited to register, when confirmed on a visit.
- An email to register will be sent via email from INAB and must be activated within 30 days.
- Receipt of notification of all visits that you are scheduled on with the relevant documents and dates.
- Receipt of an assessor agreement for each and every visit you are scheduled on.
- Manage the clearance of nonconformities online.
- Online expense claims feature.
- All new applications to become an assessor will be managed online. Ability to update your personal records online (mid-end year 2017).

CRM FEEDBACK
 Suggestions can be returned via the portal feedback link

REGISTRATION

The majority of CABs have now been registered in the new system. If you have not been invited to register, can you please contact jonathan.carson@inab.ie

Assessors are invited to register into the system, when they have been confirmed on visits.

INVOICING / CLAIMS FROM ASSESSORS

Since January 2017, all annual management fees and all invoicing will be raised through the CRM.

A small number of assessor claims for fees and expenses have been processed for assessors through the portal.

SCOPE / SCHEDULE OF ACCREDITATION

In December 2016, as part of the first phase in **transferring scopes of accreditation into the new system**, INAB rolled out 14 scope templates to clients covering various standards, to test the template and its upload success to the system.

In February and March, scope templates were rolled out to certification, inspection, and reference material bodies. All remaining templates will be rolled out by May 2017.

This is a once off task for our existing accredited CABs. Once in the system, any further additions or amendments to your scope can be managed through the portal. **See page 4** for full details on how your schedule of accreditation is transferred into the CRM.

It is proposed to have all scopes in the system by June 2017. Please note that until your scope is in the system, you will not be able to use the portal to edit or extend your scope.

The assessor section, specifically the application and qualification process, is still under development and we hope to have this up and live in the portal by the end of the year.

INAB will also be updating any business processes and changes to its internal procedures as a result of the move to the new CRM system.

UPDATE ON THE LAUNCH AND ROLL OUT

The INAB CRM system went live in November 2016. Since then INAB has been steadily rolling out the registration of users, transfer of scopes to the new system, and a number of visits have been managed through the system with the support of a number of our CABs and assessors. We would like to thank you for your support.

Update on roll out:

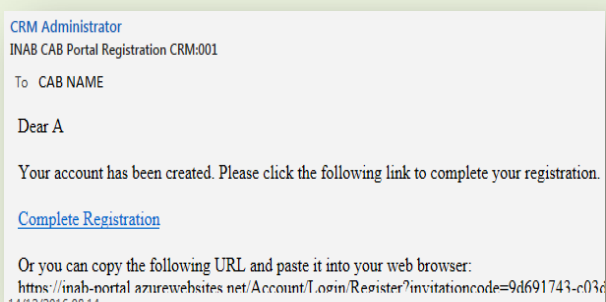
1. Full registration of all CABs into the system by February 2017.
2. Gradual registration of assessors – as confirmed on visits.
3. From Jan 17 – All annual management fees for CABs processed through the system.
4. From Jan 17, a select number of CAB's accreditations were maintained in the system, visits, nonconformities, and other stages of the accreditation process put through the new system with the support of our assessors and CABs.
5. Schedule of accreditation – transfer of all scopes to be in the system by June 2017.
6. From April 17 – all CAB's visits will be managed through the CRM.

HOW DO CABS AND ASSESSORS REGISTER FOR THE INAB CRM SYSTEM?

Applicant and accredited CABS

All existing CABS should now have been invited to register for the new system.

An email was sent from Jonathan Carson from INAB, to our current primary contact on file. The email included a URL link to set up your password. The subject includes “INAB CAB Portal Registration”.



Registration email example

Assessors

Assessors are being invited to register for the system, as they are confirmed on visits.

Assessors will be sent an email to register on the portal via a URL link from INAB and invited to set a password.

Currently we have a number of assessors that are actively participating in the management of their visits right through to claiming their fees and expenses through the portal of the CRM.

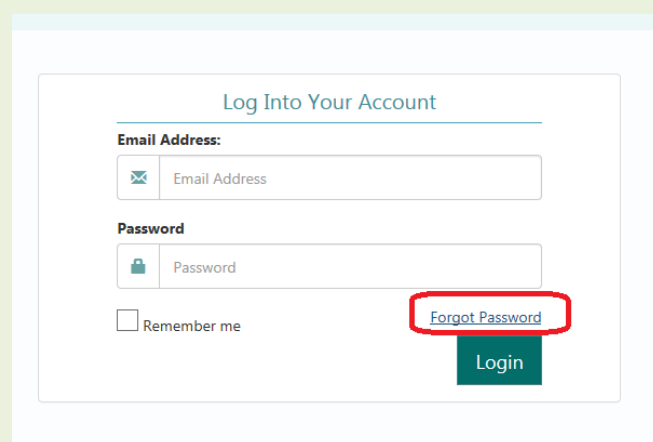
HOW DO I ACCESS THE LOGIN PAGE FOR THE PORTAL AFTER I REGISTER?

A link to the CRM portal for CABS and assessors is available on the [INAB website](#), located in the left bottom corner of the homepage.

Once you have been registered as a user, you can log in to the CRM portal link.

FORGOT YOUR PASSWORD?

If you forget your password, click on the ‘Forgot Password’ link on the login page.



You will then be asked to enter your email for a password reset – **please ensure this email is the one you registered with**, or you will not receive any password reset.

WHERE CAN I ACCESS SUPPORT DOCUMENTATION FOR USING THE SYSTEM?

Support documents are available on the library of the portal, and are also available on the [INAB website](#).

SUPPORT DOCUMENTS	Links
CAB	CAB Portal User Guide
Assessor	Assessor Portal User Guide
P9/P10 Classifications changes and revisions guidance to support template completion.	Available on the CAB Document Library

HOW DOES MY SCHEDULE OF ACCREDITATION (SCOPE) GET INTO THE CRM?

Existing CABs should have received a unique excel template to transfer their current scope and return to INAB.

All your scopes are presented in accordance with the INAB document P9 'Classification System for Testing and Calibration' or P10 'Classifications Systems for Inspections' which have been **revised** to remove matrix details and where possible to describe the competence required for the activity.

Where will I get the scope template?

Your scope template will be sent to you via email from INAB, with a guidance document on how to complete.

What do you need to do?

1. Complete your Excel template(s) and enter your **current** accredited scope, which will be **verified at your next visit**.
2. Ensure that you have the correct version of Excel (Microsoft Office 2013 and Microsoft Office 2010 are supported) to complete your scope.
3. Follow the guideline documents enclosed with your template
4. Return completed template to scopetemplate@inab.ie

This process is purely to get your existing scopes into the new system.

Once your scope is in the system, any further applications for accreditation / extensions to scope, edits to your existing scope, suspensions of scope can be made via the portal.

MY FIRST PLANNED VISIT IN THE CRM

from April 2017, any visits being planned by INAB will be managed through the CRM system. With this in mind, what can you expect?

CAB

Once the team and date are agreed, primary and deputy contacts will receive an email confirming your

next visit date. Event details can be viewed in your portal on the EVENT TAB.

- Log in and click to **acknowledge the team** for this event.
- You can **upload the relevant documentation** for this visit in the portal
- You can see the visit plan and the logistics details in the event created in INAB.
- Event statuses – what do they mean?

At different stages information will be available.

Here are the following event statuses:

Status	Explanation
Team Confirmed	You can view the assessment team and acknowledge them. You can upload documents for the assessors.
Plan Confirmed	In addition to the team being displayed the event logistics and which scope elements are assigned to assessors are also shown.
Addressing NC's	Each Assessor will upload their NC's and you will be able to work through batches of NC's
Ready for Decision	The event is ready to form part of a decision to the board.
Closed	Decision has been made. All information is ready only.

- On the visit –the assessment team will record their nonconformities "NCs" in a unique excel template and upload them into the CRM. You will add your proposed corrective action in this template.
- After the visit – the assessor will confirm what was witnessed / not witnessed at the actual visit;
- You will be able to manage your corrective actions from the portal – you can upload supporting documents also.
- **All NCs within a batch** need to be responded to before you should submit to INAB. Even if there is only 1 NC and you have responded, ensure that you also click on the SUBMIT TO INAB button, so this will be available to the team to review.
- The system will send you reminders i.e. PS10 documents due, deadline dates for NC review etc.,

ASSESSOR

- Once the team and dates are agreed with you, you will be notified via email of the visit and will be asked to login to confirm.
- You will be sent the assessor agreement which will outline the details of the visit.
- Access the application relevant to your event in the portal.
- Review the documentation uploaded by the CAB in the portal.
- Review the visit plan and record scope elements to witness.
- For the visit – download the nonconformity template (NC template) to enter NCs.
- Upload the completed template into portal
- Review corrective actions submitted by CAB through portal and respond.
- Upload relevant reports post visit in portal.
- Submit expense and fee claims through portal.

SUPPORT

Registration

Invitations are valid for 30 days – please ensure that you activate on receipt. Out of date registrations should be referred to jonathan.carson@inab.ie.

Login

Please review the login section in your guideline. Issues that arise with log in should be directed to jonathan.carson@inab.ie.

Schedule of Scope Template (CABs)

Note that if you are completing your unique excel template you should follow the [Guide](#). Any issues should be relayed back to scopetemplate@inab.ie. To support you with the changes to the P9 and P10 classifications, the new classifications and guidance to those changes are available on the [CAB portal library](#).

Maintenance of your Accreditation/Visits

CABs

If you have any questions with using the CRM, as a first you should consult the [user guide](#).

Any issues with maintaining your accreditation, or your visit on CRM, should be directed to your assessment manager.

Management of Accreditation Visits and Pre and Post activities

Assessors as a first should consult the [user guide](#) for the assessor portal. Any issues with managing your visit or pre and post activities for a visit should be relayed to your assessment manager.

What Details Should I Provide

Please include the relevant information to help us deal with your query. Include a print screen, attach the document(s) and as much information as will support INAB/ IT in its review of your query.

6 Month Review

INAB intends to do a review of the system in 6 months with our users, once we have all users actively managing their accreditation process in the CRM.

In the meantime if you wish to submit any suggestions for improvements these will be welcome via our feedback section on the portal and will be part of the review.

INAB has been steadily rolling out access to users and templates to ensure smooth management and co-ordination. With any new system, this allows us manage any changes required or address any new issues or bugs.

We would like to thank all the CABs and assessors for their patience and support as we embark on this extensive changeover in systems.

INAB will have a CRM helpdesk at our Client Forum on 6th June, set up from 9am – 1pm near the information desk. You can drop in when you arrive, and speak to the CRM core team and IT support. Bring any items you would like to review... and most important your username and password!!

Further details on the Client Forum on Page 6.

NEWS AT INAB

INAB WELCOMES NEW STAFF

INAB is delighted to welcome our newest members to the team. There are two new administrative staff, and one new assessment manager.

JONATHAN CARSON, Executive Officer <i>Joined INAB in March 2016.</i>	JANE GLASS, Clerical Officer <i>Joined INAB in March 2017.</i>	PADRAIG KEANE, Assessment Manager <i>Joined INAB in March 2017.</i>
		

STRUCTURE CHANGES IN INAB

- 1) Marie O’Mahony full time quality manager
- 2) New scheme managers – Brid Burke, laboratories; James Stapleton, certification; Pat O’Brien, inspection.
- 3) INAB assessment managers will act as lead assessor throughout 2017.

HAVE YOU CONFIRMED YOUR ATTENDANCE AT THE CLIENT FORUM?

INAB CLIENT FORUM - DUBLIN CASTLE



Celebrating World Accreditation Day

Tuesday, June 6th 2017, Dublin Castle – Conference Centre 10am – 4.00pm

INAB is delighted to extend an invitation to our applicant and accredited members to attend our client forum in Dublin Castle.

The client forum will be a platform to present the new INAB business processes and structure, the recently launched CRM, and INAB requirements. This forum is being run to mark [World Accreditation day](#).

Invitations are one invitee per organisation (or reg no). However, you may transfer your invite to another member of your organisation, if you are unable to attend, or if you consider it more appropriate.

Please confirm your attendance by emailing jane.glass@inab.ie.

Clients were invited to provide inputs to the agenda by completing our [online survey](#) which closed on 8th May.