ARMATURE's accreditation management solution lets you track all of the people, programs, and organizations you manage—and run them through your processes as they work to meet the standards you've set. Data collection and data management come together in a powerful system that's purpose-built for accreditation.

Experience quality management done right with configurable tools that your staff and volunteers will love using!

CORE FEATURES*

Organization & People Management

Keep tabs on the individuals, organizations, and groups that matter to you—and capture your entire relationship history in one place.

- **Organization Management**: Keep a record of every organization that you accredit or have a relationship with, including key contacts, accreditation history, custom fields, and much more.
- **People Management**: Keep a record of every individual in your accreditation network, including contact information, surveyor information, and committee membership.
- **Program Management**: If you have multiple accreditation programs, track each one individually for an organization. Maintain separate contact information and accreditation history for each program.
- **Committee Management**: Set up committees and record membership.
- **Key Contacts**: Track every individual associated with your customers and member organizations.
- **Triggered Notifications**: Send and receive notifications as needed when activities take place in our system (e.g. assessment completions).
- **Notes & Custom Fields**: Record additional custom information and notes for each entity in CRM.
- **Self-Service Portal**: Provide each accreditee an easy-to-use portal to track where they are in your accreditation processes, and create a single space that houses evidence of compliance.
- **Structure & Relationships**: Each organization in CRM can be broken down into multiple locations, facilities, subsidiaries, divisions, and more. You can even track vendor relationships.

Process Configuration

Configure ARMATURE's accreditation and certification processes to match your existing way of doing things—so you can get the job done without having to reinvent the wheel.

- **Process Templates**: Turn your accreditation processes into “process templates” that can be used to manage the activities of each organization or program in CRM.
- **Extensive Configuration Options**: Make certain stages optional, control who can comment or upload files, define the duration of each stage, add your own custom fields, and much more.
- **Email Templates**: Provide team members with email templates built directly into any process stage.
- **Reference Documentation**: Provide team members with procedure manuals, best practices, and other reference material: it's all integrated directly into the accreditation process.
**Process Management**

Run the organization and programs you accredit through processes that you define and build to keep them on track.

- **Accredit & Certify Organizations, Programs & People**: Run organizations, programs, and people through the processes you create and keep tabs on where they are, what's due when, and what's coming up next.
- **Accreditation History**: Record the key dates in the history of an organization's accreditation and see their current status at a glance.
- **Document Management**: Upload documents to each stage in a process and manage all uploaded documents in custom folders you create—all documents are stored in the cloud.
- **Email Tracking**: Use existing templates or create emails on the fly. All emails are sent out and recorded by ARMATURE as part of each organization's process.
- **Task Assignment**: Easily assign tasks to users.
- **Task & Process Dashboards**: View the accreditation tasks that are assigned to you and your team, including when they were assigned and when they're due. For each process, view which organizations are participating and the current status.
- **Comment Stream**: For each stage in a process, record comments as a matter of record between you and other users.

**Standards Library**

Create and manage standards, codes, and policies—and link them to assessment results and non-conformances.

- **Standards Catalogs**: Manage an unlimited number of custom standards sets, including multiple hierarchies of standards and substandards.
- **Standards Integrity**: Update standards without disrupting active assessments.
- **Assessment Integration**: Link standards to assessments and even individual assessment questions.
- **Version Management**: Create multiple versions of standards and set which versions are in effect and when.

**Question Configuration**

Along with standards, questions are the building blocks of assessments. Our system makes it easy for you to configure and manage questions.

- **Multiple Question Types**: Text, number, decimal, confirmation, date, and special document and table question types.
- **Table Questions**: Save hours of work by creating tables of questions in bulk.
- **Document Questions**: Require users to submit documents as part of an assessment.
- **Selection Questions**: Dropdown, horizontal & vertical checkboxes, horizontal & vertical radio buttons, single & multi-select list boxes.
- **“Please Specify” Option**: All questions can be set to prompt users for additional information.
- **Dynamically Add Responses**: Allow users to dynamically add rows to question responses.
- **Configure Question Permissions**: Control which questions can be commented on, uploaded to, and more.

**Question Library & Question Tools**

Create questions as part of an assessment or store an unlimited number of predefined assessment questions.

- **Question Content**: A robust content editor lets you format question text, include images, links, and more.
- **Integration with Standards**: Link each question to specific standards in your Standards Library.
- **Help, Instructions & Guidance**: Provide custom help and guidance for each question.
- **Question Organization**: Sort questions into folders.
- **Custom Data Keys**: Link question responses to your own internal reference keys.
Assessment Setup

Once your standards and assessment questions are in place, you can build reusable templates for conducting the assessment. Create a simple survey in minutes or construct complex assessments using the same robust toolset.

- **Assessment Creation**: Design assessments to meet your needs: group questions and standards into sections and pages and reorder them as required.
- **Powerful WYSIWIG Editor**: Text is easy to format using our intuitive editor. You can even incorporate images and video directly in standards and assessments.
- **Branching Logic**: Use our powerful Variables-Conditions-Rules engine to create highly specific question branching and skip logic.
- **Integration with Questions Library**: Build assessments from predefined questions.
- **Integration with Standards**: Link assessment templates to your standards libraries.
- **Document Tagging**: Create custom tags to organize the documents that are uploaded during an assessment.
- **Submission Notification Emails**: Specify recipients of email notifications when assessments are submitted.

Assessment Scheduling

Our accreditation management solution supports both internal and external assessments and makes it easy for you to assign assessments to individual users, teams, or organizations.

- **Audit Types**: Schedule both internal and external audits.
- **Team Building & Management**: Set up predefined teams of auditors for use on assessments, or assign assessments to individual users. Take into account availability, languages spoken, and skills when building a team.
- **Schedule Management**: Deploy assessments for specific dates and control the dates for each organization separately. Cancel and reschedule assessments as needed.
- **Schedule Assessments in Bulk**: Deploy assessments to specific organizations. Schedule one or more organizations at a time.
- **Assignment Notification Emails**: Team members receive auto-alerts when they are added to an assignment.

Assessment Portal

Once an assessment is created and scheduled, assessors can login and get the tools they need to perform self-assessments and onsite audits.

- **Auditor Dashboard**: Shows assessment statuses and assessment tasks.
- **Offline Access**: Download a local copy of an assessment that can be completed without Internet access. Offline assessments can be completed right in your browser; no other software required.
- **Print Completed Assessments**: Print completed assessments for use as leave-behinds or to fulfill mandated rules for hard copy retention.
- **Submission Options**: Generate reports confirming submissions of assessment results and control multiple parameters around which assessments can be submitted.
- **Export Assessments to PDF and Word**: Both blank and completed assessments can be exported and are suitable for printing.

Completing Assessments

Our system is designed to help you conduct assessments & record results efficiently and effectively.

- **Comment Stream**: Allow users to communicate and collaborate on each assessment question.
- **Dynamic Completion**: Save progress on an assessment so it doesn’t have to be completed in a single session.
- **Upload & Associate Documents**: Upload an unlimited number of documents and tie them to assessment responses. Tag documents as they’re uploaded for easy categorization.
Issues and Non-conformances

Identify non-conformance and other issues found during an assessment, track follow-up tasks, and produce leave-behind reports.

- **Issue Tracking**: Record and classify all issues found during an audit or assessment. Track severity, status, recorded and due dates, cite standards and other references, and upload documentation as evidence.
- **Resolution**: Document the resolution of all issues, including resolution date and evidence of resolution or corrective action.
- **Analysis**: Record detailed analyses of issues for commentary and follow-up.
- **Evidence Documentation**: Upload documentation to serve as evidence for issues and issue resolution, including pictures and videos.
- **Issue Report**: Generate reports of all issues found during an audit or assessment. Reports are ready for printing or download.
- **Task Tracking**: Record and track tasks that need to be performed to resolve an issue, including managing assignments and resolution of tasks.

* Some core features may require additional customizations performed by the ARMATURE development team to meet your exact needs. Typical customizations include custom questions, logic, pre-population, advanced formatting, and integration.

CUSTOMIZATION OPTIONS

Custom and configurable features require setup by ARMATURE’s development team.

Custom Automation

Let our system handle your day-to-day tasks.

- **Document Generation**: Generate custom, data-driven documents from visit reports to accreditation letters.
- **Admin Dashboard**: See which assessments are active, which organizations need action, and what auditors are up to.
- **Calculated Fields**: Include calculated fields directly on assessments.

Custom Data Services & Reporting

Harness—and leverage—the power of data.

- **Data Conversion**: Perform data hygiene services to get your information ready.
- **Data Imports**: Import your data into our system.
- **Data Visualization**: We’ll create best-of-breed dashboards for you that give critical, actionable information on the status of your team’s assessments.
- **Reports**: Create custom reports to meet your needs, including non-conformance, certificates, leave-behinds, and more.

SUPPORT & DEVELOPMENT

Licensing

Flexible setups to fit your budget and hosting needs.

- **Perpetual**: Includes updates for 12 months.
- **Subscription**: Includes updates for the duration of the subscription.
Deployment & Integration Options

Everything you need to get your accreditation management system up and running.

✔️ Hosted
✔️ On-Site
✔️ Integrate with Your Existing Platform: We can integrate with dozens of third party platforms, including: NetForum, Microsoft Dynamics CRM, QuickBooks, SalesForce, custom-built software, and other common association management systems.

Customer Support

Get help when you need it.

✔️ Email: Email support is available 24/7.
✔️ Phone: Phone support is available during regular business hours, for an additional cost.

Product Training

Our software is easy to use, and we can assist you in setting it up in line with our best practices.

✔️ On-Site
✔️ Remote

Product Training

Integrate with your organization’s SSO or use ARMATURE’s secure authentication platform. Manage your users and permissions to fit your needs. Admins, auditors, teams, organizations: it’s all there and fully customizable.

✔️ Security Roles: Define roles around users and organizations by making use of more than a hundred individual permissions.
✔️ Organization & System Roles: Independently define roles for your users and for the users of the organizations you assess.
✔️ SSO Integration: Integrate ARMATURE’s security platform with multiple types of SSOs, including SAML.

info@armaturecorp.com
1.866.471.5911
www.armaturecorp.com