

How to complete your excel Scope Template for the INAB CRM?

CRM 6

1. Purpose

The purpose of this procedure is to support INAB Clients transfer their current word scope to the INAB CRM system via a unique excel Scope Template.

2. Scope

This document applies to our current clients with word scopes or applications in the system.

3. Background

INAB are currently rolling out our new INAB Client Relationship Management system. The first phase of go live has been completed and all clients have been invited to review and complete their profiles in the system. The next phase is to get all scopes into the INAB CRM.

How will this system help you?

- You will be able to manage your accreditation from application through to ongoing maintenance, including editing your existing scope online, apply for extensions to scope etc.
- See scheduled visits, teams, and access and upload all relevant documents associated with that visit
- Manage your own profile, update contacts, address and contact information.

BEFORE YOU COMMENCE

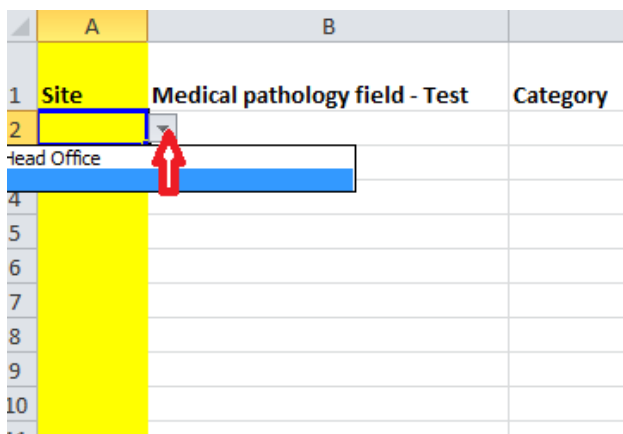
- *Check that your excel version is supported (Microsoft Office 2013 or Microsoft Office 2010) If you are using an older version of Excel, you will not see the drop down menus. You will need to access the later excel version to complete.*
- *Only use the template(s) that you have received, do not attempt to amend, reformat, alter in any way.*
- *Read this guideline and the “things to note” section*
- *Have access to your latest scope on www.inab.ie*

4. How to complete your excel Template(s)?

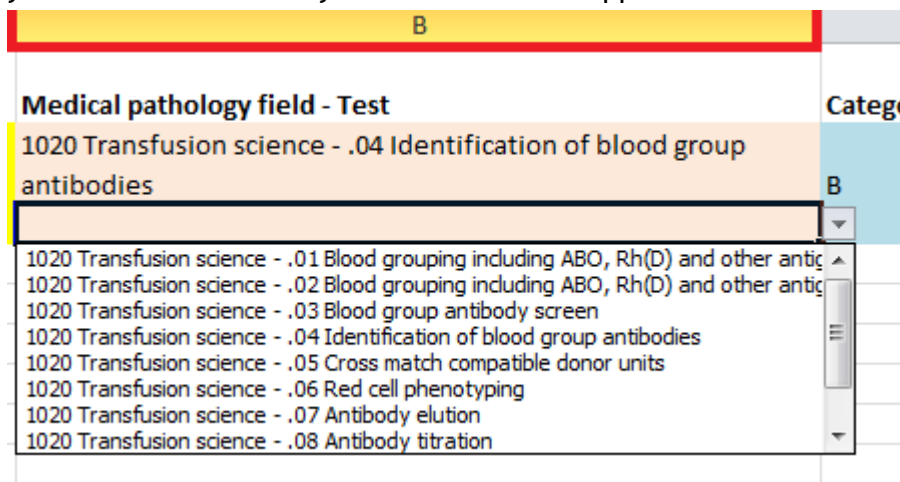
Column A, B and C in the template - are drop down menus

Click into Column A

- **Choose the relevant site**
 What is a Site? *A site is a location under the control of the CAB where conformity assessment activity covered by the scope of accreditation is performed e.g. Head Office.*



- **Click into Column B -**
 In the example below, the CAB will choose from the **Medical Pathology Field Test**, a drop down menu is available with the relevant options to your standard. Choose your test and it will appear in the cell.



- **Column C, choose the relevant category A,B,C,or D.**
 where applicable
- **Column(s) D, E, F etc.**
 The remaining columns are free text.

5. What are the flexible scopes and footnote references used by INAB?

INAB will provide detail on scopes of accreditation through footnote references. The following explains the footnote references (without variation) displayed on INAB scopes:

- **For laboratories with a flexible scope**, the following footnotes apply:
 - ¹ Range of measurement may be extended
 - ² Parameters may be added
 - ³ Test matrices may be added
 - ⁴ Equipment/kit
- **For medical testing laboratories**, the following footnotes apply:
 - ^a The hospital blood bank has been assessed and is competent to comply with Articles 14 and 15 of the EU Directive 2002/98/EC (S.I. 360/2005 and S.I. 547/2006)
 - ^b Point of care testing, ISO 22870
- **For CABs accredited for the purposes of notification** (Notified bodies), the following footnote applies:
 - ^A The CAB is accredited for the purposes of notification under [Directive/Regulation detail] and as recorded on the EU NANDO database. For further information on the notified body status contact the notifying authority [NA detail].
- For CABs with specific detail to record as footnotes, the format of [I, II, III, etc] shall apply. This information can be forwarded to your INAB officer in (word, excel) and will be added to the footnotes in the INAB Scope in the CRM.

How do I indicate my Flexible Scope on the template?

On the relevant Flexible scope - insert the appropriate NUMBER ^{1, 2, 3, 4}; This should be inserted beside the Test/Assay in Column D e.g Pregnancy Test^{1 2}

How do I insert the^{1, 2, 3, 4}?

These are known as Superscripts. It is essential that where you insert these superscripts that they are inserted as Symbols; otherwise they will not transfer into the CRM system.

NB Any Superscript, subscript, Greek text etc must be inserted as symbols; otherwise the text will not transfer (see next section for instructions).

A **subscript** or **superscript** is a number, figure, symbol, or indicator that is smaller than their normal line of type and is set slightly below or above it. Subscripts appear at or below the baseline, while superscripts are above.

6. How to insert a Symbol into Excel Template?

When you are adding in a flexible scope or indicating a footnote you will need to know how to insert a symbol. This will also be necessary for any other text that requires to be shown in superscript or subscript, Greek text etc.

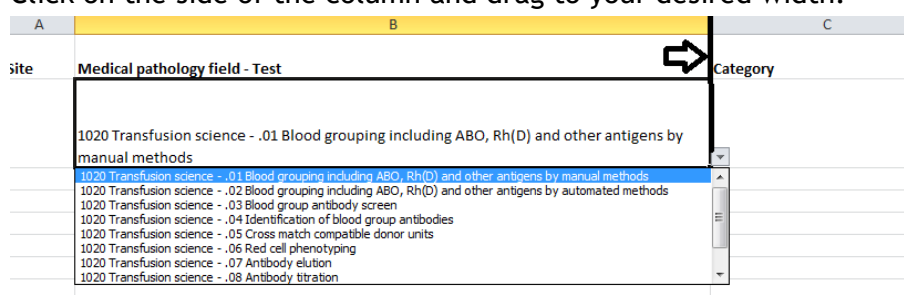
- Place cursor in the appropriate cell where you wish the Symbol to be placed
- Choose insert from the ribbon
- Click on the Symbol Ω from the ribbon
- Choose the relevant Symbol you require e.g superscript^{1, 2, 3, 4}; for flexible scopes
- Press Insert

The screenshot illustrates the steps to insert a superscript symbol in Excel. It shows the 'Insert' ribbon, the 'Symbol' icon, the Symbol dialog box with the superscript symbol selected, and the final result in the spreadsheet where the symbol is placed next to the text 'Example Test ²' in cell D2.

7. Things to note when completing the template

- a) Leave no empty rows
- b) Ensure that you have the correct version of Excel (supported Microsoft Office 2013 or Microsoft Office 2010)
- c) **You can make the columns wider** - this will assist in seeing the content of the drop down menus much easier.

Click on the side of the column and drag to your desired width.



- d) If **copying and pasting** within a drop down menu, ensure that you choose from the drop down menu first and drag down. Do not type text into drop down fields.
- e) **Subscripts, Superscript, Greek text etc must be inserted as symbols**; otherwise the text will not transfer to the INAB CRM. See section 6 pg 4 for instructions.
- f) To **wrap text**, align to top of cell etc., choose the applicable cells, rather than the column or worksheet.
- g) Click “alt and enter” to create a new line **within** a cell
- h) To freeze panes; enable editing and select the columns to freeze.

- i) When you drag cells with numerical content, ensure you tick “copy cells” to ensure the numbering is not manipulated. E.g if you want to drag “1020 Transfusion and science....” When you drag the cell down, you will need to click copy cells (see screen shot below to do this)to ensure you have 1020 copied in the number of cells you need it. If you do not do this, excel will automatically change the numerical sequence to 1021, 1022, 1023...

Site	Medical pathology field - Test	Category	Test/assay
Head Office	1020 Transfusion science - .04 Identification of blood group antibodies	A	
Head Office	1020 Transfusion science - .01 Blood grouping including ABO, Rh(D) and other antigens by manual methods		
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If you would like to print a hard copy of your excel template, you will need to set the orientation to Landscape and choose *fit columns to 1 page*, in the print options.

Template(s) should be returned to jonathan.carson@inab.ie.

