

# TotalCompliance® Feature List

## Policy & Procedures Management

*All features below, unless indicated by an asterisk(\*), are included as part of the license fee.*

### Website Features

- ✓ Separate code base and database for each site
- ✓ SSL security
- ✓ Unlimited, one-on-one training with ComplianceBridge personnel
- ✓ On-line & phone support M-F 7am-11pm PST
- ✓ Extended-hours and 24 x 7 support coverage\*

### Application Wide Features

- ✓ On-line Training, videos, and help
- ✓ Custom branding of your website
- ✓ Audit Log - with exporting, filtering, and archiving
- ✓ Automated import of user and group membership information
- ✓ LDAP/AD real-time authentication\*
- ✓ SAML/SSO real-time authentication\*
- ✓ Customer-settable enforced password standards
- ✓ Access limited by user privileges (roles)
- ✓ Unlimited number of documents
- ✓ Unlimited concurrent users
- ✓ Unlimited user-defined data-fields for use in documents, emails, and reports\*
- ✓ Editable email templates

### Document Creation

- ✓ Create/distribute any electronic file including videos and pictures
- ✓ Categorize documents
- ✓ Import any electronic file or document
- ✓ Multiple, lockable sections
- ✓ Create and use template documents
- ✓ Lock documents and sections within a document
- ✓ Archive documents to History
- ✓ Automatic (& override) version control
- ✓ Built-in HTML Editor
- ✓ Create/publish compliance documents (electronic signature required)

- ✓ Create/publish reference documents
- ✓ Create/publish template documents
- ✓ Create/publish stand-alone tests and questionnaires

## Publishing

- ✓ Automate reminders, notifications and escalation
- ✓ Connect documents (link) to one another
- ✓ Publish in the future capability
- ✓ Send Instant Text-messages to groups' members
- ✓ Include dynamic user data in emails & texting
- ✓ Use 21CFRpart11 authentication for electronic signature\*
- ✓ Use Alternate email addresses for publishing anonymously or as another user
- ✓ Specify required attachments to be returned
- ✓ Provide certificates of completion, recognition
- ✓ Automate re-publishing

## Advisory/Approval

- ✓ Seek approval/rejection and comments on a document
- ✓ Automate document review/approval process
- ✓ Pre-define advisory groups of users
- ✓ Allow documents to be directly edited by Advisors prior to publishing

## Testing

- ✓ Add survey, test, or questionnaire
- ✓ Publish stand-alone test or questionnaire with or without electronic signature
- ✓ Multiple-choice or fill-in tests and questionnaires
- ✓ Automatic test/questionnaire scoring

## Metrics/Statistics

- ✓ Irrefutable Acknowledgement
- ✓ Drill-down to subordinate groups and individual users to view compliance
- ✓ Quickly see who has/has not opened a document
- ✓ View test and questionnaire results
- ✓ View summary of test scores and answers
- ✓ Drill into test summary to see who and how many answered for each question
- ✓ View a user's specific test and questionnaires
- ✓ Quickly see who has/has not acknowledged a document
- ✓ View submitted attachments and comments

## Reporting

- ✓ Standard reports
- ✓ Simple Queries
- ✓ Custom report generation
- ✓ Custom query generation
- ✓ Export report and query data to Excel®
- ✓ Schedule and send reports automatically
- ✓ Print reports

## End-Users

- ✓ Search document content -- including pdf and Word® docs
- ✓ Preview (print) documents
- ✓ Manage "Favorite" documents
- ✓ Filter documents: One-click filtering of Unopened, Read, and Acknowledged documents
- ✓ Manage personal settings and preferences
- ✓ Display application in local language -- selected by each End-User\*

\*Additional fee required