RMS Client Guide

General Functionality

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<table>
<thead>
<tr>
<th>Topic</th>
<th>Slides</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Overview</td>
<td>3-5</td>
</tr>
<tr>
<td>Profile</td>
<td>6-7</td>
</tr>
<tr>
<td>Master Audit Program Page</td>
<td>8-9</td>
</tr>
<tr>
<td>Site Audit Program Page</td>
<td>10-11</td>
</tr>
<tr>
<td>Access Quote/Addendum</td>
<td>12-13</td>
</tr>
<tr>
<td>Password Help</td>
<td>14-16</td>
</tr>
<tr>
<td>Technical Support</td>
<td>17-18</td>
</tr>
</tbody>
</table>
Dashboard Overview
Dashboard Overview

Dashboard
Click Dashboard during anytime in RMS to bring you back to your main dashboard.

Audit Program
Click Audit Program to access your audit details:
• Master Audit Program (MAP) – Takes you to the main audit page. Click on the 5 digit number to access the MAP
• Audit List – Brings up a list of all future and past audits. Click on any of the 5 digit numbers to access the audit

Help
The Help Tab holds guidelines and documents to assist clients through the audit. There is also a list of all RMS help guides and Registrar contacts.

Request for Quote
Click Request for Quote if you would like to apply for additional certifications

Log Out
Log out of RMS by clicking on the down arrow and click log out.
Dashboard Overview

**Profile**
Review Profile details by clicking on the blue arrows or the company name. Your main PRI Registrar contacts are also listed under Profile. To access their email addresses, click on their names.

**Certifications**
Review Certification details by clicking on the blue arrows or the standard name.

**Quote Requests**
Any new quote requests from you will be listed here.

**My Tasks**
Any opened tasks that require action on your part will be listed under My Tasks. Once completed, they will be removed from the list and moved to Recent Closed Task List.

**Task Colors**
- Red – Past Due
- Yellow – Due in 3 days or less
- Green – Due in 5+ days

**Example**
- **Test Company**
  - 161 Thorn Hill Road, Warrendale OR 15885 USA
  - Phone: 724-772-1818
- EJ Keggeris, Sales Specialist (Phone: 7247724694)
- Dina Root, Client Manager (Phone: 7247723682)
Profile
Profile

Review Profile details. If any details need change, please contact your Account Specialist.

Locations
All locations will be listed under the Locations Tab. If you have multiple users, you can also view their access on this tab.

Certification
Each certification cycle will be listed under the Certification Tab. Click on the 5 digit number to access the Master Audit Program Page.
Master Audit Program
Master Audit Program Page

- **Certification** – Applicable standard
  - **Type** – Type of contract cycle
  - **Structure** – Certification Structure

- **Main location address and phone number**

- **View Pricing**
  - Click view pricing at any time to review your current contract

- **Contacts**
  - **Primary Contact** designated in the profile
  - **Audit Team** Lead auditor will be listed here

- **Program Schedule**
  - Click on the company name to access the 3 year audit cycle on the Site Audit Program (SAP) Page

- **MAP Details**
  - Any company details that are found on this page can be updated by contacting your Sales Engineer or Account Specialist.

- **PRI Contacts**
  - Your direct PRI Registrar contacts
Site Audit Program
Contacts
Additional contacts like Secondary Contact or OASIS Admin can be viewed on the Location tab under the Profile and on the SAP page.

Audits
The SAP shows a list of the 3-year contract cycle. Each audit can be accessed by clicking on the name of the audit.

Dates
Target dates are established based on the desired timeframe and cert expiration date.

SAP Details
Any company details that are found on this page can be updated by contacting your Sales Engineer or Account Specialist.
Access Quote/Addendum
Once a quote or addendum is accepted in RMS, you can click on View Pricing on the MAP page to access it. This will bring you to the most recent quote applicable to the contract cycle.
Password Help
Login and Password Reset

**RMS Login Page**
Click on the link to go to the RMS Login Page
[https://rms.priregistrars.org](https://rms.priregistrars.org)

**Forgot Password**
Click on the Forgot Password link.
*If you have previously completed an application as a Guest, click here to set up a password.*
Enter your email ID to retrieve the password.

Enter your email address, your last name, and click on the Retrieve Password button.

A link will be sent to your email to reset your RMS password.
Technical Support
• For technical support or questions about RMS
  – Contact the support helpdesk
  – Hours:  8:00 AM – 5:00 PM ET   M-F
  – Calls / emails returned within 4 business hours

rmssupport@p-r-i.org
724-772-8679