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For assistance with ISO or AS audits, please see the applicable RMS Guide
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 auditors through the audit. There is also a list of all RMS help guides and Registrar contacts.

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

**View Profile**
Review your profile details by clicking View Profile

**Calendar**
To view/add personal time to your calendar click Add Event to Calendar

**Audit Programs**
To access the list of all your assigned clients click View Audit Programs

**Audits**
To access the list of all your assigned past and future audits click View Client Audits

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

**Task Colors**
Red – Past Due
Yellow – Due in 3 days or less
Green – Due in 5+ days
Profile Information
Your contact information is visible in your profile. If it needs updated at any time, please contact the office.

Certification & IAF Codes
Each of the IAF codes and certifications you are approved to audit to will be listed here. If you are interested in adding more please contact the Technical Department.
• The auditor calendar is an essential tool used by PRI Scheduling when scheduling audits, so it is crucial to keep your calendar up-to-date.
• When you are assigned an audit, it will automatically appear on your calendar; no need to manually add it.
• You can manually add time to your calendar when you are not available.
Calendar

Add Event
Each line item will need completed. Once you have filled in all the information, click Save.

After clicking Save, your calendar will update with the dates you have now blocked off and an audit will not be able to be scheduled over these dates.

Note: If you need to remove blocked dates, click on the red H and change the type of activity to Open. The dates will then show up as a white O.
Master Audit Program (MAP)
Master Audit Program Filter

**Search Criteria**
You can filter your clients by any of the criteria shown in the filter box. Once criteria is entered, clicked apply.

Click here to expand the filter search area.

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### Filters

<table>
<thead>
<tr>
<th>Filters</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td></td>
<td>Client Manager</td>
<td>Select</td>
<td></td>
</tr>
<tr>
<td>Cert Number</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standards</td>
<td>AS 9100</td>
<td>AS 9110</td>
<td>AS 9120</td>
<td>ISO 9001</td>
</tr>
<tr>
<td>Application Type</td>
<td>New</td>
<td>Recert</td>
<td>Transfer</td>
<td>Cert Structure</td>
</tr>
</tbody>
</table>

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Click on the 5-digit cert number to access the client account.
Master Audit Program

Main location address and phone number

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

Contacts
Primary Contact
This is the main contact that should be contacted concerning the audit

PRI Contacts
The PRI Registrar contacts responsible for this client/audit

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

You can download your list of audits by clicking spreadsheet or csv

Click here to expand the filter search area

Search Criteria
You can filter your audits by any of the criteria shown in the filter box. Once criteria is entered, click apply

By default, this page is sorted by audit ID # but you can click the blue arrows to sort by another category

Click on the 5-digit audit number for direct access to the audit
Accessing Prior Audits
During an audit, you may have to review prior audits or review an entire previous audit cycle.

To access a prior audit in the current cycle, you will need to be on the Site Audit Program (SAP) page. If you are within an audit, you can use the links at the top of the page.
From the SAP page, you can open any of the previous audits by clicking on the blue name.
Accessing Prior Audits

To access a previous audit cycle, you can click on the company name in the top left-hand corner of any page.
Accessing Prior Audits

Once in the client profile, click Certifications. All prior audits and other certifications will be listed here in chronological order (oldest at the top).

Click on the desired standard, then the 5-digit cert number to access the prior certification cycle.
Click on the company name to access the prior 3-year audit cycle on the Site Audit Program (SAP) Page.

<table>
<thead>
<tr>
<th>Test Company</th>
<th>Primary Site</th>
<th>Phone: 123-456-7890</th>
</tr>
</thead>
<tbody>
<tr>
<td>123 Main Street, Anytown, PA 12345, United States</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Primary Products and Processes**
Test Company creates airplane parts for consumer use.

**Scope of Certification**
Manufacturing and distribution of components for Commercial and Government use.

**ITAR/EAR Restriction**
Not Required

**IAF/NACE Codes**
17 Basic metals and fabricated metal products

**Program Schedule**

<table>
<thead>
<tr>
<th>Test Company</th>
<th>Primary Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>123 Main Street, Anytown, PA 12345, United States</td>
<td>Jane Client</td>
</tr>
</tbody>
</table>

**Contact Information**

- **Primary Contact**
  - Jane Client
  - Quality Manager
  - Phone: 123-456-7890 x123
  - jclient@p-r-i.org

- **Audit Team**
  - Joe Auditor
  - Lead Auditor

- **PRI Contacts**
  - EJ Kegerreis
  - Sales Specialist
  - Dina Rigot
  - Client Manager
Accessing Team Auditor
Contact Info
When you need to access a team auditor’s contact information, you can do so by going into the audit that you are assigned to with the team auditor and click on their name.
This will bring you to their profile page where you can find their email address and phone number(s).
Password Help
Login and Password Reset

RMS Login Page
Click on the link to go to the RMS Login Page
https://rms.priregistrar.org

Forgot Password
Click on the Forgot Password link.
Enter your email ID to retrieve the password.

- Email ID
- Last Name

**Retrieve 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

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