PRMS Editing or updating an auditor’s details

1. From the cases tab, find the auditor group.

2. From the auditor group select the auditor you wish to amend from the right hand side column. The right hand side column shows 10 cases at a time. Use ‘next’ and ‘previous’ to navigate.

3. Click on the name of the auditor. This opens a case page specific to that auditor.

4. Click on the tasks tab (left hand side of the page).

5. Select ‘add’ and this will bring up a pop-up window with two drop downs visible and:

   a. leave the first drop down (update auditor)
   b. put the auditor name into the second drop down
   c. push the OK (bottom left hand side of the pop-up window).

6. This brings you to a largely white screen. Look to the top right hand side of the screen and push the add button (or cancel if you have made an error).

7. This will take you back to the auditor group case. Close this case (top right hand side of the page).

8. Go to the in-basket from the work tab of the PRMS.

9. Open the update auditor case.

10. Change the properties fields to update the auditor’s details.

11. When finished, push ‘Update Auditor’ (top right hand side of the page).

12. Note that if you are wishing to make the auditor inactive, then just push the ‘Inactivate Auditor’ button (top right hand side of the page).

Other helpful info:

- You can sort the list of auditors by date modified or by their first and last name, choosing either ascending or descending, by using the options at the top of the case list.

- Use this task to up-date details such as name changes, qualification changes, recording performance review and updating witnessed audit dates.

- If you have an inactive auditor and wish to make them active again, use can use this task as the inactive auditor will still show on your auditor register list from the auditor group page.