

PRMS – general helpful tips for DAAs

Navigating

Use the scroll bars to navigate across and up the pages as some content can be ‘cut off’ dependent on the settings on your computer screen.

Do not use the browser buttons (back and forward buttons on the top left hand side of the screen that shows the webpage info).

Locked out

If you have a bright red padlock next to a case, you are the person that has locked it. Go into that file and choose edit then close and then it will unlock that file for yourself or others. If the padlock is dull red it is locked by someone else that has access to the case you have – this is likely to be someone else in your DAA that uses the PRMS. If you try to open the case it will tell you the user name of the person who has it locked.

Always close out of each screen by either completing a process (where it takes you out of the screen) or use the top right hand button “close”. This will prevent locking the file.

If you have locked a file, when you go into the case it will ask you if you wish to edit – choose edit and then either close the case or proceed.

Finding fields

Where there are small arrow buttons to the side of a title or heading these open or expand to show other fields.

Searching

If using the Cases search side of the PRMS, you can use a wildcard % to assist in searching. If you put the % either side of the word or phrase the search will look for that word or phrase anywhere within the field you are looking for. The search function is case sensitive.

Most people find it easiest to search either by Legal Entity Name, Regulatory Instrument Name or Premises Name.

Messages

If you get a screen saying widgets initialising – push ‘OK’ and wait for the PRMS to finish populating the data on the screen.

You will get a warning screen when trying to close out of a case in the cases search side of the screen asking you if you want to save your changes, proceed through this step as you can’t edit or save on this side of the PRMS. This is a known issue which can’t be changed.

Comments

To review other people’s comments you can view these through the comments button (top left hand side of most screens) or through the history tab (left hand side of the page). If using the history option, change the view from view “all” to view “comments”.

Errors

If an error occurs, this should show on the in-basket screen. Go back into the case and look in the history tab to see what data was not completed and is preventing the case from being progressed to the next step (It will be a field you haven’t completed correctly). If you look at the history it will explain which field is the problem.

Overview of the PRMS as it relates to DAAs

