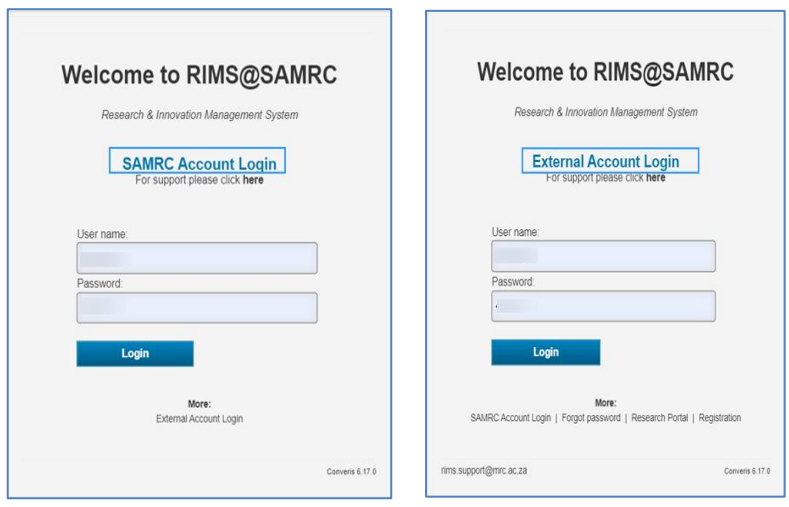
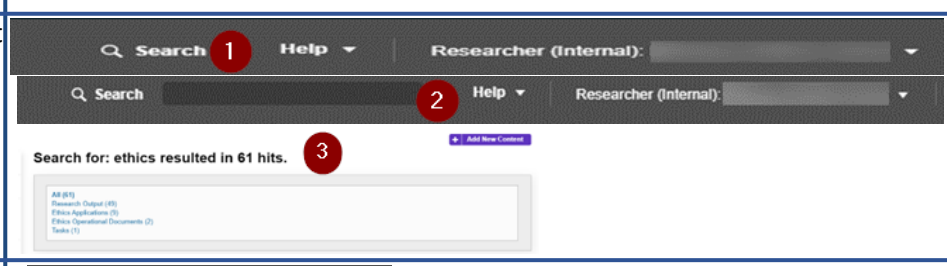
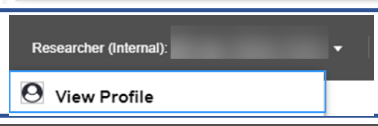
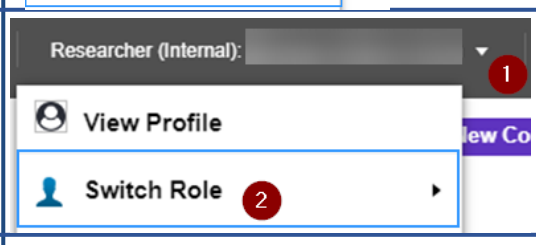
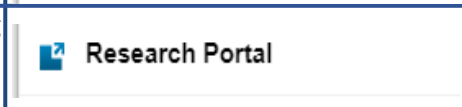
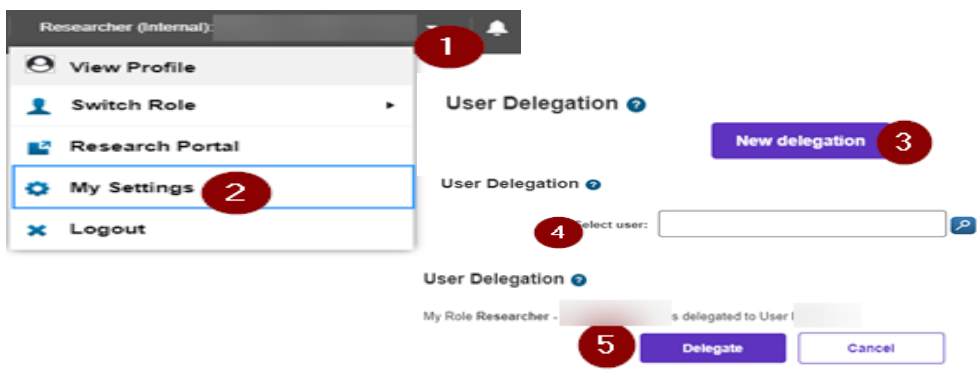
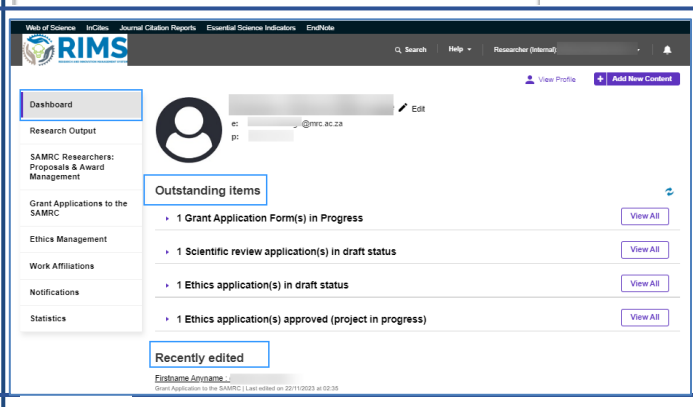
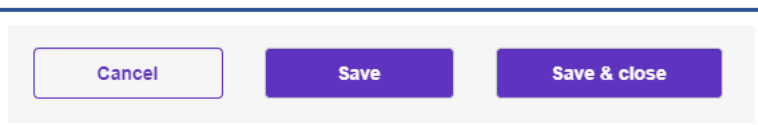
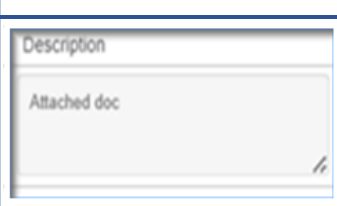
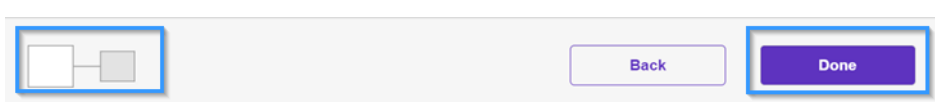
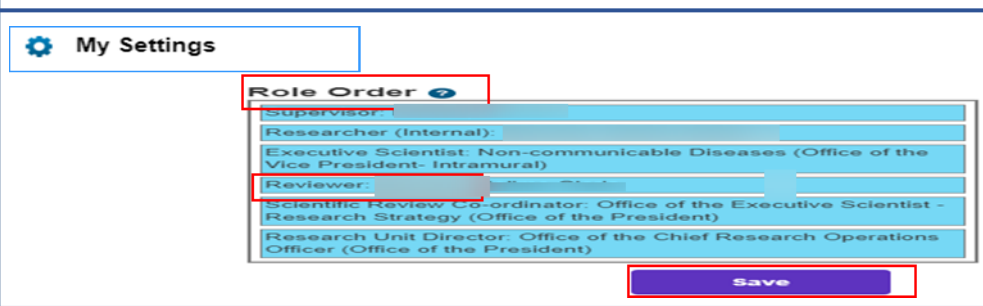
RIMS Basic Navigation

1	To access the RIMS system, follow the steps below. RIMS Production environment: https://rims.samrc.ac.za **SAMRC Member login:** • **Username:** SSO user Id • **Password:** Related password **Non-SAMRC Member login** • **Username:** Provided by RIMS Support • **Password:** Provided by RIMS support and click "Login"	
2	The **"Header Search"** provides a convenient and efficient way to search for and access information within the system.	
3	The **"View Profile"** feature allows users to access and view their details.	
4	To switch to a different role: 1. Use the dropdown arrow, 2. Select "Switch Role" 3. Select the appropriate role	
5	The **"Research Portal"** is the external facing part of the RIMS system with information that is accessible externally.	
6	To delegate a role: 1. Log in to your RIMS account 2. Go to "My Settings" 3. Choose "New delegation" 4. Use the search icon to find and select the person you want to delegate to 5. Confirm the delegation. Please note that only the Researcher role can be delegated.	
7	By selecting "Logout," you will be signed out of the system.	
8	Once logged in the system, this is the landing page. On the left, is the **"Left Navigation"** with various modules. In the middle is the **"Dashboard"** reflecting **"Outstanding items"** as a list of items that require attention/action. The **"Recently edited"** will show a list of items, documents or any other content that have been updated most recently.	
9	The field should enable the user to add or search for items within RIMS.	
10	Expanding the field should activate one or more of the following options. **Search existing, View A-Z list, View tree structure, Add new.**	
11	The field should enable the user to insert a date.	
12	Fields with an asterisk are mandatory and the system should enforce completion upon save if field has not been completed.	
13	Fields with the tick box below should enable the user to click and activate a tick.	
14	Fields with a dropdown should give a user more options when the dropdown is expanded.	
15	Links with the "bin" deletion sign mean that an existing link can be deleted, and another one may be added using the "plus sign".	
16	**Save** means you are saving the form in the same workflow step/status it is on. **Save as** means you wish to move the form to another step, and/or exit out of the form.	
17	If a text box has diagonal lines on the bottom right-hand corner, it is possible to enlarge the amount of text visible under the Description column by dragging the small diagonal lines in the bottom right-hand corner of the relevant block.	
18	The two squares at the bottom depict that you are in a secondary/linked form, and you can save changes on the related from by clicking "done" or click "back to return to the main form without saving.	
19	To set a role as the default role when accessing the system. Click on "My settings" Select "Role Order" Hold and drag the desired role to the top Click "Save"	

If you require assistance or additional support, please send an email to rims.support@mrc.ac.za