

RMA eMentor/eStatement Studies

This document is to be used for supporting eMentor and eStatement Studies Subscribers on accessing the new online platform, containing Frequently Asked Questions. Subscribers will be able to begin accessing the new platform on December 6, 2022.

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Question	Answer
GENERAL QUESTIONS	
<p>What is the difference between the eMentor Subscription, and the eStatement Studies Subscription?</p>	<p>These are two of RMA's most commonly purchased and accessed online resources.</p> <p>eMentor is a credit and lending resource offering access to industry research reports and resources, best practices in commercial lending, call preparation questions, and eCases in addition to also providing access to eStatement Studies. This subscription is purchased on an institutional level and provides key resources for credit analysts, underwriters, lenders/relationship managers, and other credit and lending professionals. It is accessible by using https://ementor.rmahq.org</p> <p>eStatement Studies is primarily a quantitative resource, presenting more than 600-industry benchmarking data reports that include balance-sheet and income statement line items, and 22-classical financial ratios. eStatement Studies can be purchased by users as a single license, multi-seat license, or on an institutional level. This resource is used by banking and small business lending professionals, as well as CPAs, lawyers, business valuers, and a variety of other industries. It is accessible by using https://estatementstudies.rmahq.org</p>
<p>How do I learn more about eMentor, and/or purchase eMentor for my institution?</p>	<p>We ask that you reach out to one of our RMA Relationship Managers for more details on eMentor, and pricing.</p>
<p>How do I learn more about eStatement Studies, and/or purchase eStatement Studies?</p>	<p>You can learn more by clicking here, and selecting 'Buy Now' to view pricing, and make a purchase directly online.</p>
<p>How do I make changes to my subscription (i.e. primary contact, number of licensed users, etc)?</p>	<p>For eMentor subscription changes, please reach out to your RMA Relationship Manager or ementor@rmahq.org.</p> <p>For eStatement Studies subscription changes, please contact Customer Care, customers@rmahq.org.</p>
<p>What are the major differences between the old side (RMAU) and the new eMentor/eStatement Studies site?</p>	<p>The most noticeable change will be in the overall look and feel of the site, as well as login for users changing to Single Sign On (SSO). ALL RMA courses, diagnostics and certificates now reside in RMA Ignite – it is a separate application with the same SSO login. While the new site will navigate and function in the same manner as RMAU, users will have a more user-friendly experience with additional features such universal search, the option to favorite pages, and updated Commercial Lending Best Practices.</p>

Question	Answer
When will the old RMA University (RMAU) site be deactivated?	All existing users should have their new SSO profiles created no later than December 31, 2022. RMA will no longer support RMAU thereafter.
I am interested in RMA Membership. Who should I contact?	<p>RMA offers memberships on an Institutional, and Individual basis. To see the benefits of each, and which membership is best for you, click here.</p> <p>If you have any additional questions, you can reach out to an RMA Relationship Manager, or for general inquiries email member@rmahq.org</p>
What other products and services does RMA offer?	To learn more about RMA events, products, and services, please visit www.rmahq.org , or reach out to an RMA Relationship Manager .
How do I get my institution to be included in the Statement Studies?	Annual Statement Studies is compiled from RMA Member Institution borrowers' financial statements. If your Institution is interested in participating in the annual Submission Campaign, you can view last years details here , or you can contact one of our Product Managers by sending your inquiry to studies@rmahq.org .

Question	Answer
TECHNICAL QUESTIONS	
<p>My RMAU login credentials don't work. How do I log in?</p>	<p>RMA is moving to a Single Sign-On (SSO) experience that will use your RMAHQ.ORG login information to access the platform instead of your old RMAU credentials. The good news is this means just one login for accessing RMA services going forward!</p> <p>Once you have an established eStatement Studies subscription, and have created an RMAHQ profile, you can access it with this URL: https://eStatementStudies.rmahq.org</p>
<p>What does 'Single Sign On' (or SSO) mean?</p>	<p>Single Sign-on (SSO) occurs when a user logs in to one application (i.e. RMA HQ) and is then signed in to other applications automatically, regardless of the platform (i.e. eMentor, eStatement Studies, RMA Ignite), technology, or domain the user is using. The user signs in only one time, hence the name of the feature (Single Sign-on). Users will have ONE Username and ONE password to access any subscription. Users will continue to be prohibited from sharing login credentials, per our EULA.</p>
<p>What happens the first time I try to login to eMentor, or eStatement Studies?</p>	<p>First, you will land on our new landing page for login. To login, select 'Subscribe/Login.' If you have an existing RMA HQ user profile, the system should recognize you and you will bypass entering any login credentials, navigating you to the home page of eStatement Studies.</p> <p>If you have not registered an RMA HQ user profile, you will need to complete this step, by selecting 'First -time User.' Complete the registration prompts, and complete your user set-up.</p> <p>PRO TIP: The system will recognize your membership status and company, based on your professional email address. Once on this step be sure to select the correct company. If you need assistance with this, you can reach to our Member Team, memberapp@rmahq.org</p>

Question	Answer
<p>I don't have an rmahq.org account. How do I create one?</p>	<p>If you have not registered an RMA HQ user profile, you will need to complete this step, by selecting 'First -time User.' Complete the registration prompts, and complete your user set-up.</p> <p>PRO TIP: The system will recognize your membership status and company, based on your professional email address. Once on this step be sure to select the correct company. If you need assistance with this, you can reach to our Member Team, memberapp@rmahq.org</p>
<p>Do I have to create an rmahq.org account in order to browse eMentor or eStatement Studies?</p>	<p>With the new platform, it is required to create an RMA HQ profile, yes. You will not be able to access your products without completing this step.</p>
<p>I have not received my User Invitation to create a User Profile. What should I do?</p>	<p>Individuals whose institutions are eMentor subscribers can automatically get access by self-registering here. Admins no longer need to individually register new users.</p> <p>If you have an eStatement Studies subscription, we first recommend checking your junk/spam folder for the email from noreply@rmahq.org. If you cannot retrieve the email, you may use the instructions detailed above for creating your RMAHQ profile.</p>
<p>The RMA Site is not recognizing my email address so that I can create an RMA HQ user profile, and password. Who should I contact?</p>	<p>If you are having trouble creating an RMA HQ profile, you should send an email to memberapp@rmahq.org.</p>
<p>I have a SSO Login, but when I login I receive the following message, "You do not have access to the content. Please contact an RMA Admin for details.' Can you help?</p>	<p>For eMentor: This message could be appearing for several different reasons:</p> <ol style="list-style-type: none"> 1) Your institution may not be a current eMentor subscriber. Reach out to your Relationship Manager (contact information can be found here) or eMentor@rmahq.org to verify your institution is a subscriber. 2) Your RMA Associate account may be associated with the incorrect institution. For example, the subscription is under "Bank ABC, USA" but you registered as an employee of the international holding company, "Bank

Question	Answer
	<p>ABC AG." You can see what account you are associated with at RMAHQ.org under your account details, or reach out to members@rmahq.org.</p> <p>For eStatement Studies: This message could be appearing for several different reasons:</p> <ol style="list-style-type: none">1) Be sure that your subscriptions are paid to date. Typical terms are 12-months. You can view balances on www.rmahq.org, or contact Customer Care, (800)677-7621, or customers@rmqh.org.2) Reach out to your Institution Administrator, as they may need to Assign you access to the subscription content, or they can verify if there have been any recent changes to your subscription.3) If you are accessing your subscription via Auto Login, we may simply need to update the IP Addresses associated with your account. You should submit these changes to eStatementStudies@rmahq.org.

Question	Answer
eStatement Studies – Institution Administrators	
<p>What is an Institution Administrator, and what is their role?</p>	<p>Institution Administrators are ONLY authorized for multi-user subscriptions (i.e. subscriptions with more than 1 user). This authorization allows the Institution Administrator to manage the subscription user – Add New Users, Assign/Unassign subscription access.</p>
<p>Will there be any Institution Administrators training?</p>	<p>While there is no formal training, detailed instructions will be included in the Institution Administrators initial welcome email, and we will have a recorded tutorial available soon.</p>
<p>How does an Institution Admin begin to 'Add' new users to the subscription?</p>	<p>Once the Admin is logged into the subscription, Admin can click 'Hi, Your Name' and select 'Admin.' This will allow the Admin to easily move from the Admin Site and User Site.</p> <p>Once in the Admin site, select for the 'Users' menu, and then 'Invite New Users.' Here, the Admin can begin entering the professional email addresses of each of the contact users, using a semi-colon (;) to separate each contact email. When ready, click 'Send Email(s).' This will automatically send the contacts an email with instructions on how to register their RMAHQ profile, and create a password.</p> <p>Upon the Users initial login, they will need to Accept the EULA. Once this is accepted, the User will have automatically been Assigned a one User License to access the eStatement Studies subscription. This auto assign function is only allotted to the number of users on your subscription. If you add more users than your subscription allows, you have 1 of 2 options:</p> <ol style="list-style-type: none"> 1) 'Unassign' one of the existing users (see instructions below) 2) Contact Customer Care to increase the number of licenses on your subscription

How does an Institution Administrator grant (or 'Assign') or remove (or 'Unassign') access to the eStatement Studies?

Once an Institution Administrator has sent the 'Invite New User' email, upon the Users initial login, they will be automatically assigned a user license.

However, the Admin can manually do this if there are necessary changes throughout the life of the subscription. To do so, Admin can navigate to the 'Products' menu and select 'Assignable Products.' Here Admin can click 'ASSIGN' by the users name. in the *Action* column:

Assign = grants eStatement Studies access to a user
Unassign = removes eStatement Studies access from a user

Once a user has been 'Assigned' access, this triggers the system to send a notification to the user notifying them of the product assignment.

You can verify product assignment because the 'Date Assigned,' and 'Assigned By' column will auto-fill.

Assignable Products for RMA

User Name or Email

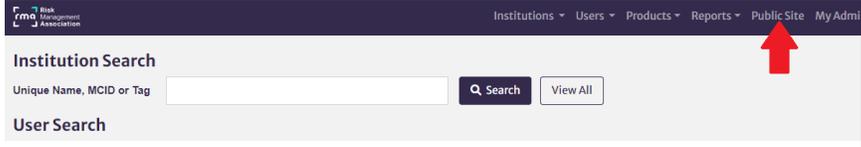
Include Inactive

There are **4 seats** available for this product.

An email will be sent to each user when they are assigned a product. If multiple products are assigned to a user during the same day, an email will only be sent to each user for the first assignment.

↓ 119 users matching the search criteria.

Action	User Name	Email	Date Assigned	Assigned By
Unassign	Amajid	hamajid@rmahq.org	10/20/2022	Shea Scarpa
Assign	Baier	jbaier@rmahq.org		
Assign	Belkoski	sbelkoski@rmahq.org		
Assign	Beasley	dbeasley@rmahq.org		

Question	Answer
<p>Do Institution Administrators still have a separate login for admin-type tasks?</p>	<p>No! There is a single sign-on. Once you're logged into eStatement Studies, an Institution Administrator can navigate from the Public user site, to the Administrator site by clicking on 'Hi, Your Name!' in the top right corner, and select 'Admin.' Very easy!</p>  <p>For an Admin to navigate back to the Public user site, select 'Public Site:'</p> 
<p>What type of reporting is available to Institution Administrators?</p>	<p>Currently, there is only a user view available. However, coming soon Admins will be able to generate usage reports.</p>

Question	Answer
eStatement Studies – Auto Login Subscribers	
<p>How will my access change due to the new SSO method?</p>	<p>For eStatement Studies subscribers using the Auto Login method (or, IP Address), the only change is to the URL! The new URL that auto login subscribers should use is https://eStatementStudies.rmahq.org/IPLogin</p> <p>You should share this new URL with your IT Staff to have updated on your intranet, or list of online resources.</p>
<p>Is there still an Institution Administrator for Auto Login accounts?</p>	<p>Yes! Each Admin is required to create an RMAHQ profile (see instructions above). If this is not completed, we can not link IP Address(es). So it is important to have this completed in a timely manner. If the Admin contact needs to be changed, please contact eStatementStudies@rmahq.org immediately.</p> <p>Remember, there is NO Need to create individual users for this type of subscription. The only contact/user that is required to register should be the Institution Administrator.</p>
<p>My institution/university has access via the Auto Login, but I cannot get into the site. What should I do?</p>	<ol style="list-style-type: none"> 1) Be sure that you are using the new auto login URL: https://eStatementStudies.rmahq.org/IPLogin 2) It is likely that the IP Address for your institution/company/university has changed and RMA needs to update the account. You can send changes to eStatementStudies@rmahq.org 3) If changes to the primary contact (or Institution Admin) have changed, please reach out to eStatementStudies@rmahq.org 4) Lastly, we do suggest using Google Chrome as the primary browser for this site.