## VERSION CONTROL

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## DOCUMENT CONTROL

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## CONTINUOUS IMPROVEMENT

NHMRC endeavours to provide the best training to the Australian medical and health research community through a continuous improvement practice. Your feedback and recommendations will be used to review and update the training materials in the future. Any feedback can be sent to the RGMS training team at rgmstraining@nhmrc.gov.au.
Contents

1. Introduction ........................................................................................................................................... 5
  1.1. Target Audience ............................................................................................................................. 5
  1.2. What is the Research Grants Management System? ................................................................. 5
  1.3. NHMRC Grants Lifecycle ............................................................................................................. 6
  1.4. RGMS Roles .................................................................................................................................. 6
  1.5. RGMS Training Program ............................................................................................................. 7
    1.5.1. User Guides .......................................................................................................................... 7
    1.5.2. eLearning .............................................................................................................................. 7
  2. Accessing RGMS ................................................................................................................................ 8
    2.1. Accessing the RGMS Login Page ............................................................................................... 8
    2.2. The RGMS Login Page ............................................................................................................ 9
    2.3. Setting up an account ................................................................................................................ 10
    2.4. Logging on .................................................................................................................................. 11
      2.4.1. RGMS Password Policy ...................................................................................................... 12
    2.5. Retrieving a Forgotten Username .............................................................................................. 13
    2.6. Resetting a Forgotten Password ................................................................................................. 15
    2.7. Maintaining Your Account Details ............................................................................................. 16
  3. Navigating RGMS ................................................................................................................................ 17
    3.1. RGMS Home Page Layout ......................................................................................................... 17
    3.2. Top Menu Bar ............................................................................................................................ 18
    3.3. Favourites ................................................................................................................................... 19
      3.3.1. Adding a page to your Favourites ...................................................................................... 19
      3.3.2. Deleting pages from your Favourites ................................................................................. 19
    3.4. RGMS Tabs ................................................................................................................................ 21
    3.5. Filtering ..................................................................................................................................... 22
      3.5.1. Saving Filters .................................................................................................................... 22
      3.5.2. Managing Filters ............................................................................................................... 23
    3.6. Mandatory Fields ...................................................................................................................... 23
    3.7. Enter Once Fields ..................................................................................................................... 23
    3.8. Look-up Fields .......................................................................................................................... 23
    3.9. Save, Save and Return and Return ............................................................................................. 25
    3.10. Export options .......................................................................................................................... 26
    3.11. The Options Menu ................................................................................................................... 26
  4. Profile and Curriculum Vitae (CV) ........................................................................................................ 27
    4.1. The Importance of Your Profile and CV .................................................................................... 27
    4.2. Accessing Your Profile and CV ................................................................................................. 28
    4.3. The Profile and CV Tabs ............................................................................................................ 29
      4.3.1. The Properties Tab and Drop Down Menu ....................................................................... 29
    4.4. Profile Menu Options ................................................................................................................ 30
      4.4.1. Panel Nominations and Invitations .................................................................................... 30
4.4.2. Peer Review Unavailability ................................................................. 30
4.5. Updating your CV Details .............................................................. 31
  4.5.1. Create a new Qualification, Award or Prize ............................... 31
  4.5.2. Auto-Populating Publications .................................................... 33
4.6. The Check List Tab ........................................................................ 36
4.7. The Process Tab ............................................................................ 36
4.8. Requesting a CV Snapshot ........................................................... 37
4.9. Managing Your Account and Personal Details .............................. 39
  4.9.1. Updating my email address and name ...................................... 40
  4.9.2. Changing Your Password ............................................................ 41
  4.9.3. Change My Secret Question & Answer ...................................... 42
5. Ongoing Support ........................................................................... 43
1. Introduction

This is the first in a series of Research Grants Management System (RGMS) user guides for members of the research community. The focus of this guide is to introduce NHMRC’s RGMS. This guide is a prerequisite for all other RGMS training. See the NHMRC website for a complete list of training resources.

NHMRC acknowledges that your responsibility is to undertake research that improves the way of life for all Australians. As a result we have created these guides to support you during the grant application and administration process. Our intention is to provide this guidance in a clear, concise and logical structure, so you can efficiently submit information in RGMS while continuing your primary focus, your research. Topics covered in this guide include:

- Accessing RGMS
- Navigating RGMS
- Accessing and updating your Profile and Curriculum Vitae
- Ongoing support available.

1.1. Target Audience

The information in this guide is aimed primarily at users who have access to RGMS and maintain profile and curriculum vitae.

NOTE FOR RAOs only

When sections of this guide are relevant to Research Administration Officers (RAOs) only, the topic is highlighted with an orange note appended at the beginning of the section.

1.2. What is the Research Grants Management System?

RGMS is a system that enables you to apply for, track and administer NHMRC grants online, as well as participate in peer review.

Researchers can also maintain a profile and curriculum vitae, which is used for application and other administrative purposes.
1.3. NHMRC Grants Lifecycle

The NHMRC grant lifecycle consists of four main phases (see Figure 1).

![NHMRC Grants Lifecycle Diagram]

**Figure 1 - NHMRC Grants Lifecycle**

**IMPORTANT NOTE**

While this diagram summarises the typical steps in the process, the unique requirements of each NHMRC funding scheme may introduce additional or fewer steps. Always refer to the scheme-specific [funding rules](#) for further information and clarification.

1.4. RGMS Roles

Members of the research and administrative support community may play a number of different roles in the granting cycle. Typical roles are illustrated below.

![RGMS Roles by Phase Diagram]

**Figure 2 – RGMS Roles by Phase**
1.5. **RGMS Training Program**

Training is structured around the four phases of the NHMRC grant lifecycle (see Figure 1). The training program illustrated in Figure 3 aims to provide the skills and knowledge needed to perform common tasks.

Target audiences for the program include:

- Applicants
- Assigners
- Assessors
- Grantees
- Research Administration Officers
- Finance Officers

All training material can be accessed from the [RGMS Training Program](#) web page.

![Figure 3 – RGMS Training Program for the research community](image)

1.5.1. **User Guides**

User guides are available as a written source of information about RGMS functionality. They provide a detailed reference to RGMS information and processes.

1.5.2. **eLearning**

eLearning modules are a practical way to become familiar with RGMS functionality. They contain interactive simulations that cover the key steps needed to complete common tasks.
2. Accessing RGMS

In this section, we will show you how to access RGMS along with the steps needed to manage your access credentials. Specific topics covered include:

- 2.1 Accessing the RGMS Login Page
- 2.2 The RGMS Login Page
- 2.3 Setting up an account
- 2.4 Logging on
- 2.5 Changing Your Password
- 2.6 Confirming a Forgotten Username
- 2.7 Resetting a Forgotten Password

2.1. Accessing the RGMS Login Page

To begin using RGMS you need to navigate to the RGMS login page via the internet. The best way to access RGMS is by using your internet browser to navigate to NHMRC website https://www.nhmrc.gov.au.

**IMPORTANT NOTE**

The browsers supported by RGMS are:

- Windows OS – Microsoft Internet Explorer 8.0, Firefox 19.0.2 and higher, Firefox ESR 17.0.4 and higher, Google Chrome 25.0.1364.172m and higher
- MAC OS – Safari 6.0.2 and higher, Firefox 19.0.2 and higher
- Linux OS – Firefox 19.0.2 and higher.

2. To access the RGMS login page select the **Login RGMS** button; this will open into the RGMS Login page.

![Figure 4 – NHMRC Website Grants RGMS Access](image)
3. Alternatively, access can also be gained under the **Grants** drop down menu and then selecting **Research Grants Management System (RGMS)**.

Figure 5 – The RGMS Login Page

### 2.2. The RGMS Login Page

The RGMS login page consists of five primary areas that provide you easy access to information about RGMS. These panels are regularly updated with relevant information. The five areas are:

1. **Links** – These are quick links to information about RGMS and applying for grants.
2. **Login Pane** – This is where you enter in your details to logon to RGMS, also you are able to, retrieve a forgotten username, reset a forgotten password, or submit a request for a new RGMS account.
3. **Information** – The information pane lists currently open rounds and the contact details for the Research Help Centre (RHC).
4. **RGMS Availability** – The RGMS Availability pane displays notices about any planned or unplanned outages of RGMS.
5. **Reference Pane** – The reference pane has additional information that you may need to refer to. For example browser compatibility and privacy information.

Figure 6 – Layout of the RGMS Login Page
### 2.3. Setting up an account

**IMPORTANT NOTE**

An account creation request can take up to one or two business days to process. When your request is approved, you will receive a confirmation email with your new logon details. Please phone NHMRC’s Research Help Centre if your request is urgent. For further information on how to contact the Research Help Centre refer to section 5 Ongoing Support.

Setting up an account with RGMS is an easy process via the RGMS login page. To request an RGMS account, complete the following steps:

1. Navigate to the RGMS login page, refer to section 2 Accessing RGMS for further information.

2. From the quick links below the login details select **New to RGMS? Submit a new user request here.**

![Figure 7 - Login Page-New Account](image)

3. Read the disclaimer and privacy notice, and select **Accept** to continue.

![Figure 8 Disclaimer and privacy note](image)
4. Complete your user profile, select **Next**.

![New User Request – User Profile](image1)

**Figure 9 – New User Request – User Profile**

5. Enter your password, secret question and answer, and your telephone secret code. Select **Finish** to submit the account creation.

![New User Request – Credential Profile](image2)

**Figure 10 – New User Request – Credential Profile**

2.4. Logging on
When you have received your confirmation email you can logon to RGMS for the first time with the username you received in the email and the password you had previously specified.

1. Navigate to the RGMS Login page, refer to Section 2 Accessing RGMS for further information.
2. Enter your username and password into the fields.

![Figure 11 – RGMS Login Fields](image)

3. Select **Sign In** button.

### 2.4.1. RGMS Password Policy

To provide a secure environment, a password policy applies to RGMS accounts:

- a minimum password length of thirteen (13) characters, or
- or a minimum password length of ten (10) characters, and contains at least three (3) of the following character sets:
  - lowercase characters (a-z)
  - uppercase characters (A-Z)
  - digits (0-9)
  - special characters

For example: aA@0zb123

It is recommended that you avoid combinations of characters that a person may be able to guess. For example, your pet or children’s names, or your date of birth. It is also beneficial to avoid consecutive letters or numbers, for example, “abc” or “123”.

2.5. Retrieving a Forgotten Username

If you have forgotten your username you are able to retrieve it from the RGMS login page by following the steps below.

**IMPORTANT NOTE**

You will not be able to complete this process if you have forgotten your secret question and answer.

If you have forgotten the answer to your secret question and answer you will need to contact the Research Help Centre for assistance. For further information on how to contact the Research Help Centre refer to section 5 ongoing Support.

1. Navigate to the RGMS login page. Refer to section 2 Accessing RGMS for further information.

2. Select the **Forgotten Username?** link.

3. Complete all the fields with your details and select **OK**.

4. Enter your answer to your secret verification question and select **OK**. If you have not yet set a secret question and answer for your RGMS account, please do so by calling the Research Help Centre via 1800 500 983 during business hours.
5. Your username will be displayed as demonstrated in Figure 13. Then select OK to return to the RGMS Logon page.

![Figure 14 – Forgotten Username – Request Completed](image)
2.6. Resetting a Forgotten Password

If you have forgotten your password you can follow the steps below to reset your password by selecting the Forgotten password? link on the RGMS login page.

**IMPORTANT NOTE**

You will not be able to complete this process if you have forgotten your secret question and answer.

If you have forgotten the answer to your secret question and answer you will need to contact the Research Help Centre for assistance. For further information on how to contact the Research Help Centre refer to section 5 Ongoing Support.

1. Navigate to the RGMS login page, refer to 2 Accessing RGMS for further information.
2. Select the Forgotten password? Link

   ![Figure 15 - Login Page-Forgotten password link](image)

3. Complete all the fields with your details and select OK.

   ![Figure 16 – Forgotten Password – User Details](image)

4. Enter your answer to your secret question and select OK.
5. Enter in and confirm a new password and select Submit.

![Image showing Forgotten Password - Secret Question]

**Figure 17 – Forgotten Password – Secret Question**

Your password has now been changed and you will be able to login to RGMS using the instructions in section 2 Accessing RGMS.

### 2.7. Maintaining Your Account Details

Once you have set up your account you have the ability to change your email address, rest your password and update your contact details.

Please refer to section 4.9 Managing Your Account and Personal Details.
3. Navigating RGMS

In this section we will demonstrate how to navigate within RGMS and introduce a few key principles that all users should be familiar with.

As part of this topic we will cover:

3.1 RGMS Home Page Layout
3.2 Main Menu Bar
3.3 Favourites
3.4 RGMS Tabs
3.5 Filtering
3.6 Mandatory Fields
3.7 Enter Once Fields
3.8 Look-up Fields
3.9 Save, Save and Return and Return
3.10 Export options
3.11 The Options Menu

IMPORTANT NOTE

Save your work often. RGMS will ‘time out’ after 30 minutes of inactivity and DOES NOT recognise typing as an activity. A time out will cause you to lose any unsaved data.

When entering data into text fields with large character limits, avoid a time out by completing a draft of your work in an offline document such as Word, from which you can copy and paste into the relevant RGMS fields

Please note that the character count used within RGMS differs from that used by Word and Adobe.

To check that your data fits within the RGMS character limit restrictions please use the following resource;


3.1. RGMS Home Page Layout

The RGMS Home Page consists of six components that you are likely to use:

1. Main Menu Bar
2. RGMS Tabs
3. Display Panel
4. Right Side Bar
5. Navigation Tips
6. Bottom Links

Figure 19 – RGMS Home Page Layout (Applicants View)

3.2. Main Menu Bar

The Main Menu bar is visible in every screen in RGMS and consists of seven menu options.

Figure 20 – Main Menu Bar

Those options are:

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Back</strong></td>
<td>You can select Back at any time to return to the previous page. Tip: It is recommended that you use this Back button rather than the back button in your browser.</td>
</tr>
<tr>
<td><strong>Recent Pages</strong></td>
<td>This drop down lists the last 20 pages that you have visited in your current session. This list is refreshed every time you log out.</td>
</tr>
<tr>
<td><strong>Main Menu</strong></td>
<td>Hover over the Home option to display the list of RGMS menu items.</td>
</tr>
<tr>
<td><strong>Favourites</strong></td>
<td>Hover over the Favourites option to display a list of your favourite pages. For information on customising this list, refer to section 3.3 Favourites.</td>
</tr>
</tbody>
</table>
| **Refresh** | Use this button to refresh the page you are currently on.  
**Note:** Make sure you save your information if you want retain the information you are entering. Unsaved information will be lost if you click this button. |
| **Home**   | You can select Home at any time to return to your RGMS Home Page. |
| **Logout** | You can select this at any time to logout of RGMS. It is important that you save before logging out to prevent losing any changes. |
3.2.1. Main Menu Button

The Main Menu button enables users to navigate more easily across all of the RGMS by providing a dropdown menu of the key areas within the RGMS.

There are several headings with subsequent links to the various sections in RGMS. These are:

- Personal
- Documentation
- My Home
- Grant Management
- Applications
- Assessments
- Other Administration
- Custom Objects

![Figure 21 - Main Menu dropdown](image)

3.3. Favourites

The Favourites feature is visible in every screen in RGMS and can be used to easily access pages that you use frequently.

3.3.1. Adding a page to your Favourites

1. Navigate to the page you would like to add as a favourite.
2. Hover over **Favourites**, then select **Add Current**.

![Figure 22 – Adding a page to your Favourites](image)

3.3.2. Deleting pages from your Favourites

1. Hover over **Favourites**, then select **Configure**.
Figure 23 – Favourites > Configure
2. Select the checkbox next to the page(s) you want to delete, then select **Remove**.

![Figure 24 – Removing a page from Favourites](image)

3. To confirm the removal of the page(s), select **Yes**.

![Figure 25 – Confirming Removal of a Page](image)

### 3.4. RGMS Tabs

The RGMS tabs provide access to all of the primary functions of RGMS, which are labelled and grouped by each of the primary roles.

<table>
<thead>
<tr>
<th>Home</th>
<th>My Profile &amp; CV / Account</th>
<th>Applicants</th>
<th>Referees</th>
<th>Assigners</th>
<th>Assessors/Panel Members</th>
<th>Grantees</th>
<th>RAO/Finance Officers</th>
</tr>
</thead>
</table>

![Figure 26 – RGMS Tabs](image)

The tabs are:

- Home
- My Profile and CV / Account
- Applicants
- Referees
- Assigners
- Assessors/Panel Members
- Grantees
- RAO/Finance Officers

**IMPORTANT NOTE**

Not all of these tabs may be visible to you. Which tabs are visible depends on your role and access level.
3.5. Filtering

Many pages have a filter at the top of the page. This is used to search and narrow the results.

**IMPORTANT NOTE**

When you are typing a search term into a field on a filter, insert an asterisk (*) at the beginning of the line. This acts as a wild card which effectively expands your results, for example *cancer will return results with either ‘throat cancer’ or ‘lung cancer’ in the title.

![Application Filter](image)

**Figure 27 – Application Filter**

To change the visibility of the filter select Expand Filter or Collapse Filter icon next to Filter to display or hide the filter.

To apply a filter, enter terms into the relevant field(s), then select Filter.

To remove any filters applied to the list, select Clear.

Alternatively, if available, you can show all information that you have access to by selecting Show All.

3.5.1. Saving Filters

You are able to save a filter by selecting Save Filter. Enter a filter name in the Filter Name field, and select Save and Return to save the filter for future use.

If you select the Default tick box, it will make your customised filter the default filter for that page.

![Saving a Filter](image)

**Figure 28 – Saving a Filter**
To apply a saved filter, use the **Filter** drop down menu in the top left of the screen.

**Figure 29 – Filter Drop Down Menu**

### 3.5.2. Managing Filters

You are able to manage saved filters in the **Manage Filters** option from the filters drop down menu. This allows you to rename or delete filters and select which filter is the default. Please remember to remove filters once you have finished with them to ensure you have full access to searchable data.

**Figure 30 – Manage Filters**

### 3.6. Mandatory Fields

As you navigate through these screens you will notice that there are mandatory fields marked with a white asterisk in red square 🔄. In order to continue through these sections you will need to complete all mandatory fields.

### 3.7. Enter Once Fields

Some of the fields in RGMS, for example in your Profile and CV, are marked with a green arrow 🔄. When this information is saved you are no longer able to edit the information.

### 3.8. Look-up Fields

Often you will find a look-up field. They are used to search against lists in RGMS and select a result.

**Figure 31 – Administering Institution Lookup Field**

You can type directly into the look up field to display any matching results.
**IMPORTANT NOTE**

When you are typing a search term into a field on a filter, insert an asterisk (*) at the beginning of the line. This acts as a wild card which effectively expands your results, for example ‘cancer’ will return results with either ‘throat cancer’ or ‘lung cancer’ in the title. A maximum of 10 results will display using this search method. Refine your search term to reduce the number of results.

![Image of Application List](application_list.png)

**Figure 32 – Searching directly in the Look Up field using the Wildcard (*) Feature**

Alternatively, select the Browse icon ![Browse Icon](browse_icon.png) to access the list, enter a search term, click on the Filter button and choose from the results by selecting the radio button ![Radio Button](radio_button.png) in the left column and select Add ![Add Button](add_button.png).

![Image of Administering Institutions](administering_institutions.png)

**Figure 33 – Administering Institutions Lookup Page**
3.9. **Save, Save and Return and Return**

When you are entering data in RGMS you will regularly have displayed at the top and bottom of the pane three buttons:

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>When you select <strong>Save</strong> all the work on the page will be saved, and you will remain on the current page. This enables you to continue editing, if you wish.</td>
</tr>
<tr>
<td><strong>Save and Return</strong></td>
<td>When you select <strong>Save and Return</strong> it saves the work and returns you to the parent page for the current page. (For example if you are on the CV page you will be returned to the Profile and CV Tab main page.) Depending on the task you are performing, you may still need to complete fields on other pages to finalise the task as a whole. Refer to the relevant instructions to confirm what steps are needed in each case.</td>
</tr>
<tr>
<td><strong>Return</strong></td>
<td>When you select <strong>Return</strong> it will discard all unsaved changes and return you to the parent page for the current page.</td>
</tr>
</tbody>
</table>

**IMPORTANT NOTE**

It is important to regularly save your work in RGMS as sessions automatically time out without saving after 30 minutes of inactivity. Even though you may be currently typing in a text field, this does not register as activity. You must select **Save**, **Save and Return**, **Return** or move between pages to reset the timer and keep your session active. If RGMS times out, any unsaved changes will be lost. To prevent this, regularly select **Save** to save the text you have entered.

![Figure 34 – Example of the Save, Save and Return and Return buttons](image-url)
3.10. Export options

The Export to Excel and Export to PowerPoint icons, which appear at the top right of some pages, can be used to export the data displayed to either Excel or PowerPoint. This feature is available for data displayed in all RAO Dashboard tabs, and on certain other pages throughout RGMS.

3.11. The Options Menu

The Options icon, which appears at the top right of some pages, also lists a range of other options available to the page. It may also be used to export the data displayed to either Excel or PowerPoint.

The configure option is how a data table is sorted but is not suggested for users to amend any of these configurations.

Figure 35 – Options Menu Example
4. Profile and Curriculum Vitae (CV)

The My Profile & CV / Account tab is used to store your personal/professional information, such as contact details and academic record.

This section of the user guide will cover:

4.1 The Importance of Your Profile and CV
4.2 Accessing Your Profile and CV
4.3 The Profile and CV Tabs
4.4 The Properties Tab and Drop Down Menu
4.5 Profile Menu Options
4.6 Updating your CV Details
4.7 The Check List Tab
4.8 The Process Tab
4.9 Requesting a CV Snapshot
4.10 Managing Your Account and Personal Details

4.1. The Importance of Your Profile and CV

**IMPORTANT NOTE**

It is important that your Profile and CV details are accurate and current before submitting an application.

Completion of the following core profile fields is a pre-requisite to creating an application or being added as a chief investigator:

- Pro-PD (Personal Details) page – Title and Preferred Phone No
- Pro-A (Address) page – Institution (Primary)
- Pro-RE (Research Interests) page – Broad Research Area, Research Keywords 1-5

NHMRC also relies on Profile and CV information to:

- Populate certain parts of the application form, which are considered in the assessment process (e.g. name, institution, publication history, etc.)
- Identify suitable experts for peer review (e.g. Assigners Academy, Grant Review Panel members and external assessors)
- Communicate with administering institutions, applicants, assessors and grantees.

**IMPORTANT NOTE**

It is important to regularly save your work; if you are timed out of the system (30 minutes) any work not saved will be lost.
4.2. Accessing Your Profile and CV

The first step to populate your Profile and CV is to access the My Profile and CV / Account tab.

3. From the RGMS home page, select the My Profile & CV / Account tab.

4. Select Edit my Profile and CV from under Quicklinks to Edit My Account.

![Figure 36 – Link to Edit my Profile and CV](image)

5. Select the Properties icon to open your profile and CV.

![Figure 37 – Accessing My Profile and CV](image)

**IMPORTANT NOTE FOR RA Os ONLY**

You may have more than just your Profile and CV listed here, to access your own Profile and CV click on the properties icon against your own name.

You are able to access other users’ Profile and CVs if they have given you access to it. For further information on how a researcher can grant you access to his/her profile and CV refer to the RGMS User Guide – Applying for Grants (Research Community).
4.3. The Profile and CV Tabs

Each Profile consists of the following elements:

- Properties tab and drop down Menu
- Check List tab
- Processes tab

These tabs will be covered briefly in the following pages.

![Properties Drop Down Menu](image1.png)

4.3.1. The Properties Tab and Drop Down Menu

The Properties tab is the default tab that is displayed when you access your Profile and CV. It has some useful information related to security and privacy.

You can access all your Profile and CV information by selecting the **Properties** drop down menu.

![Properties Drop Down Menu](image2.png)
4.4. Profile Menu Options

The profile menu options (beginning with “Pro”) are used to maintain your personal details, manage your peer review nominations and invitations, and change your peer review availability and your academic areas of expertise.

You can access these areas by selecting the relevant menu option in the Properties drop down menu.

![Properties drop down menu]

**Figure 40 – Profile Menu Options**

You are able to modify your details, through the following menu options:

- Pro-PD: Personal Details
- Pro-A: Address
- Pro-RE: Research Interests
- Pro-FR: Fields of Research

### 4.4.1. Panel Nominations and Invitations

NHMRC funding recipients are expected to support the peer review process by participating in the assessment of other applications. The **Pro-PN: Panel Nominations and Invitations** page allows you to self-nominate to be on a peer review panel (PRP).

Refer to the [RGMS User Guide – Assessment Processes (Research Community)](RGMS User Guide) for more detail.

### 4.4.2. Peer Review Unavailability

Due to working and personal commitments, you may be unavailable from time to time to assist with the grant peer review process. The **Pro-PU: Peer Review Unavailability** page allows you to notify us of any periods that you are unavailable to participate in this process.

Refer to the [RGMS User Guide – Assessment Processes (Research Community)](RGMS User Guide) for more detail.
4.5. Updating your CV Details

The CV menu options (prefixed with CV) are used to enter in your academic resume.

In the Properties drop down menu, you are able to access and update a wide range of CV information, including:

- Qualifications, Awards and Prizes
- Employment History
- Appointments
- Career Disruption
- Professional Memberships
- Conference Participation
- Community Engagement
- Patents
- Translation into Policy / Practice
- Contribution to NHMRC
- Editorial Responsibilities
- Supervision and Mentoring
- NHMRC Research Funding
- Other Research Funding
- Publication Uploads
- Publications
- Workload

![CV Menu Options](image)

**Figure 41 – CV Menu Options**

Information is entered in the CV via two different methods:

- Creating new records – This includes the creation of any record that allows multiple records to be created, for example a qualification or award.
- Completing forms – This includes any page that you need to open and complete the fields on the page.

The next two subjects (4.5.1 Create a New Qualification, Award or Prize and 4.5.2 Auto Populating Publications) provide examples of these methods. Using these methods you will be able to update all the information in your Profile and CV.

### 4.5.1. Create a new Qualification, Award or Prize

1. Navigate to the My Profile and CV page. For further information, refer to section 4.2 Accessing Your Profile and CV.
2. Select the Properties icon to access your My Profile and CV section.
3. Select the **Properties** drop down menu.

4. Select the **CV-QAP: Qualifications, Awards and Prizes** menu option from the list.

![Properties drop down menu](image)

**Figure 42 – Qualifications, Awards and Prizes menu option.**

5. To create a new record, select **New**.

**IMPORTANT NOTE**

To amend an existing record, select the properties icon or if available any of the hyperlinked fields.

To delete an existing record select the check box on the left hand side row of the record you wish to delete. Then select **Delete** and confirm the deletion again by selecting **Delete** to initialise the deletion process.

6. Select the type of qualification, award or prize from the **Type** drop down menu. The types you can choose from include:

- PhD
- Masters
- Graduate Diploma
- Graduate Certificate
- Distinction
- Degree
- Diploma
- Certificate
- Award
- Prize
- Other

7. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the **CV: Qualifications, Awards or Prizes** list page.
4.5.2. Auto-Populating Publications

To save you time, you can automatically upload publication lists to your CV. You can upload one or more publication files for eight different publication types:

- Journal Articles (Original Research)
- Accepted for Publication
- Journal Articles (Review)
- Books/Chapters
- Research Report – Commissioned by Government, Industry or Other
- Technical Report
- Text Book
- Editorials
- Letters to the Editor

You are able to upload one publication type at a time. The publication data needs to be stored in one of the following file types:

- **Tab Delimited File** – This is a file for you to populate your publication data in a template provided by NHMRC. The templates are available as you follow the steps below.
- **EndNote (XML Export)** – This is an exported file from your EndNote Library, not the library itself.

Follow the steps below if you would like to automatically populate your publications.

1. Navigate to the **My Profile and CV** page. For further information refer to section 4.2 Accessing Your Profile and CV. Select the **Properties** icon to access your My Profile and CV section.

2. **Select the Properties drop down menu**

3. Select the **CV-PU: Publication Uploads** menu option from the list.

![Figure 43 – Publication Uploads Menu Option](image)

**Figure 43 – Publication Uploads Menu Option**
4. Select **New** to create a new publication upload instance.

![Publication Uploads Screen](image)

**Figure 44 – Publication Uploads Screen**

**IMPORTANT NOTE**

In order to submit the publications you will need to prepare an upload file. This can be done by:

- EndNote XML Export
- Tab Delimited file using Upload Publications Templates (both in excel and xml formats)

The Hints & Instructions on the page provides helpful information on using these two processes.

The Upload Publication Templates are located on the NHMRC website on the [RGMS page](https://www.nzhrmc.gov.au).

![Hints & Instructions](image)

**Figure 45 – CV Tab – Upload Publication Hints and Instructions**
5. Select the **Upload Source** drop down menu.

6. Select the relevant file type from the list.

![Figure 46 – Upload Source Types](image)

7. Select the **Publication Type** drop down menu.

8. Select the relevant publication type from the list.

![Figure 47 – Publication Types](image)

9. Select **Browse** to search and select the publication data file on your local PC.

10. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the CV Publications Upload page.

This action will start a process to populate the information in your Publications page automatically for you.
4.6. The Check List Tab

To check that all mandatory information has been entered in your Profile and CV, select the Check List tab at the top of the screen and ensure that all relevant pages are marked with a green tick ✓. A red cross ✗ indicates that the corresponding page contains mandatory information that has not been completed.

**IMPORTANT NOTE**

The Check List is to be used as a guide only. If no information is required on that particular page, or that page is not required to be complete, disregard the red cross.

![Figure 48 – The Check List Tab](image)

4.7. The Process Tab

The Processes tab is used by RGMS Administrators only and can be disregarded.
4.8. Requesting a CV Snapshot

A **Snapshot Request** exports all the data in your CV into a single word document, for you to review as a whole and keep a copy for your records.

- A new snapshot cannot be requested until at least 2 days after a snapshot is generated.
- The job to generate CV snapshots is run overnight, and a limit is imposed on the number of snapshots created per night - to prevent interference with other system activities.
- Requests for snapshots are queued, based on creation date, and consequently, in periods where a large number of requests exist, your snapshot may not be available for a number of days.
- Upon completion the document will be emailed to the address specified in your RGMS profile. When the snapshot is completed it will be emailed to your preferred email address.

1. Navigate to your **My Profile and CV** page. For further information, refer to 4.2 Accessing your Profile and CV.
2. Select the **Properties** icon to access your My Profile and CV section.
3. Select the **Properties** drop down menu.
4. Select **Snapshot Request** menu option.

![Figure 49 – Snapshot Request Menu Option](image-url)
Hints and instructions for requesting the snapshot are displayed. It provides some information relevant to the following steps.

1. In the **Request a Snapshot** drop down menu, change the default answer to **Yes**. (If a snapshot has been requested within the last two days, this option will not be available).

   If a Blackout Period is in effect (i.e. snapshots are unavailable due to peak demand on the system), change the default answer to **Yes – after the blackout finishes on (date)**.

2. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the **Profile and CV** list page.

You will receive an email with your snapshot attached once the process has finished and your snapshot has been generated.
4.9. Managing Your Account and Personal Details

Within the **My Profile & CV/Account** tab you are also able to access all the functions to change/update your:

- Email address or name
- Existing password to login to RGMS
- Secret questions & answer

![Figure 52 - My Profile & CV/Account Tab-Quicklinks](image)

These details are managed by the RGMS Identity Manager section of the RGMS.

![Figure 53 - RGMS Identity Manager Main Page](image)
4.9.1. Updating my email address and name

Follow the steps below to update/amend your email address or name associated with your RGMS login account:

1. Navigate to the My Profile and CV page.
2. Select Update my email address and name within the Quicklinks list.

![Figure 54 - Update Email Address and Name Quicklink](image)

3. The RGMS Identify Manager will open at the Change My Account Details page in a new window.

![Figure 55 - Change My Account Details Page](image)

4. Edit the required fields and then select Submit.
4.9.2. Changing Your Password

To Change your Password you will need to login to RGMS.

1. Navigate to the My Profile/Account tab
2. Select the Change My Password link

3. The RGMS Identity System page will automatically open in a new window at the Change My Password page

4. Complete all the mandatory fields and select Submit.
4.9.3. Change My Secret Question & Answer

To Change your login Secret Questions & Answer you will need to login to RGMS.

1. Navigate to the My Profile/Account tab
2. Select the Change My Secret Question & Answer link

![Figure 58 - Change my secret password quicklink](image)

3. The RGMS Identity System page will automatically open in a new window at the Change My Secret Question & Answer page

![Figure 59 - My Secret Question & Answer Page](image)

4. Select a new secret Question from the dropdown and insert a new answer in the secret answer field, then select Submit.
5. Ongoing Support

NHMRC’s Research Help Centre (RHC) offers information and assistance to the research community in relation to a variety of activities, including:

- research funding opportunities;
- applying for grants, including opening and closing dates;
- administering grants;
- peer review policies and guidelines; and
- using NHMRC’s Research Grants Management System (RGMS).

You are able to contact the RHC from 9am to 5pm AEST/AEDT Monday to Friday, using the details below.

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:help@nhmrc.gov.au">help@nhmrc.gov.au</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>1800 500 983 (or +61 2 6217 9451 for international callers)</td>
</tr>
</tbody>
</table>