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1. Introduction

IMPORTANT NOTE:
The material in this Quick Reference Guide (QRG) is intended to complement other QRGs for Academy members and the RGMS User Guide – Assigner Processes, available on the Assigners Academy page of the NHMRC Website.

This Quick Reference Guide refers to processes involving assessors based at overseas institutions. Please note that there are some differences in the processes of inviting and securing assessments from Overseas External Assessors (OSEAs). For further instructions see Quick Reference Guide Part 4 – Inviting Overseas External Assessors.

Further information and assistance with Assigner processes is available from the Assigners Academy team via email or from NHMRC’s Research Help Centre (RHC) by phone between 9am and 5pm AEST/AEDT Monday to Friday.

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:academy@nhmrc.gov.au">academy@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>
2. Getting Started

2.1. Accessing Your Assigned Applications

From the RGMS Home Page, select the Assigners tab.

Open the Assignments – Assigners and Applications page by selecting any one of the last three Quicklinks for Assigners.

Set the filters as shown:
- Declaration Complete – All
- CoI - All
- Assigned – Yes
- Active Applications – Yes
- Assigner Suitability – All

Select Filter.

What it looks like:

[Diagram showing how to navigate to the Assigners and Applications page and set filters]
2.2. Viewing General Application Information

How to Navigate
Click on either the Properties icon or the hyperlink in the Application column for the application you wish to open.

What it looks like
The columns on the centre-right provide a status summary of all your assigned applications.

The Assigner Application: General - Properties page will open.
On the Assigner Application: General – Properties page you can select one of two tabs that contain background detail on the application and research team:

- **Application** tab – General application/team information and a link to the Assessor Snapshot report.
- **CI Publications** tab – All publications in the last five years recorded in RGMS by each CI on the application.
  - **NOTE:** This list will not take into account Career Disruptions. To view Career Disruptions, you will need to access the Assessor Snapshot report in the Application tab.

Select either tab to display details.

You can also view a summary of all Assigner actions and results to date for this application.
2.3. Downloading Application Documents

This process provides you with a zip file containing the full documentation for every application assigned to you. You can use this documentation to help you identify suitable External Assessors.

**IMPORTANT NOTE:**
Mac users may experience difficulties opening zip files. Apple’s default Archive Utility program is known to have compatibility issues with password protected zip files. An alternative zip expander, such as Stuffit Expander, is recommended.

### How to Navigate

- From the **RGMS Home Page**, select the **Assigners** tab.
- Under the **Quicklinks for Assigners** heading, select the **Review application documents** quicklink.

### What it looks like

The **Download Documents List** page will open. Disregard the filter section. Select **New Download Documents**.

The **Create Download Documents** page will open.
Enter the following information into the fields:

- **Round** field – enter the Round name, e.g. 2018_Project Grant_funding_commencing_2019
- **Document Type** dropdown menu – select Application Documents – Assigner.
- Select Save.

The **Download Documents: download - Properties** page will open.

Hover over the **Properties** dropdown menu and select Documents - Assigner.

The **Download Documents: download - Properties** page changes to reveal additional fields. In the **Details** section, populate the fields as follows:

- **Name** field – Start typing your last name and select your name from the options that appear
- **Download Purpose** dropdown menu – Select Allocate Assessors
- **Password** field – create and enter any password you wish under 20 characters in length.
- **Generate Zip File** dropdown menu – Select Yes

When finished, select Save. **Wait one minute then refresh the page** (F5 on a PC/Command+R on a Mac).
After refreshing the page, a hyperlink will appear in the URL field. **Wait one minute before clicking the link** to allow time for the zip file to assemble.

After selecting the hyperlink, follow the prompts. Use the Save As option to download the zip file to your computer. You have 120 hours (five days) to do this before the link is made inactive.

Once the zip file downloads to your computer, open it and extract all folders. You will need the password you created earlier in this process to extract the files.
2.4. Identifying Potential External Assessors

How to Navigate

Access the Assigner Application: General - Properties page using the instructions in Section 2.1. This page offers two search options:

- Candidates Based on Keyword Matches
- Keyword Search

What it looks like

Candidates Based on Keyword Matches

Select this tab to match keywords common to both the application and RGMS account holders. Change the number in the Minimum matches with Application field to increase or refine the number of results returned by the search.

Press Filter to view your results.

You can choose potential External Assessors from the outcome of this search.
How to Navigate

By clicking on the Plus icon next to a name, you can drill down into the External Assessor’s profile to examine exactly which keywords match, as well as any matches with Broad Research Area/Field of Research.

![Image of the user interface showing how to navigate and what it looks like]

What it looks like

Keyword Search

Select this tab to compare RGMS account holder keywords to a custom list of keywords you create.

![Image of the user interface showing the Keyword Search tab and how it works]
The **Keyword Search** tab contains two independent search filters. Search results can be expanded or narrowed by using the filters separately or together.

- **Keyword Name Contains** (a) is a free-text lookup field that allows you to search against a single keyword.
- The **Combine Partial and Full Keyword Matches Using** (b) and **Keywords** (c) fields can be used with or without the **Keyword Name Contains** field to perform complex searches by combining strings of keywords.

These three filters allow you to perform complex searches by combining strings of keywords. For example, the search below filters for researchers who have the keywords ‘gene’ (a) and (b) ‘RNA binding proteins’ or ‘RNA processing’ and ‘genetic engineering’ (c) listed in their RGMS profile.

You can narrow results further by entering search criteria in the following fields:

- **Broad Research Area**
- **Field of Research**
- **State**.

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**How to Navigate**

**What it looks like**
2.5. Final Steps

2.5.1. Verifying Eligibility

**How to Navigate**

Access the Assigner Application: General - Properties page using the instructions in Section 2.1.

To verify that identified potential External Assessors are eligible to provide an assessment, select the *Ineligible Candidates* tab.

Enter the potential External Assessor’s name in the *Name* field and select *Filter*, or scroll through the alphabetical list of ineligible candidates.

A researcher whose name appears on the list must NOT be invited to assess this application.

**What it looks like**

![Diagram of Assigner Application: General - Properties page]

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2.5.2. Assigning a Potential External Assessor to an Application

**IMPORTANT NOTE:**
You may assign any number of External Assessors to an application, but there can only be two active (pending/accepted) invitations per application at any given time.

To initiate the process of assigning an External Assessor to an application, navigate to the Assigner Application: General - Properties page using the instructions in Section 2.1. Hover over the *Properties* tab and select *Assignments*.

The Assigner Application: Assignments Properties page will open.
At the bottom of the screen, click the New button.

The Assigner Application: Create Assignment page will open.

If the potential External Assessor is based at an Australian institution, start typing their last name in the Candidate With RGMS Profile field and select their name from the options that appear. If they do not have an RGMS account, see the next box.

If the potential External Assessor is based at an overseas institution (or is based in Australia but does not have an RGMS account), enter their name into the Candidate Without RGMS Profile field.

Select Save or Save and Return. The potential External Assessor will appear on the Assigner Application: Assignments Properties page and will have a grey arrow against their name. They can now be invited to review the application.