



Australian Government

National Health and Medical Research Council

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Research Grants Management System (RGMS)
2018 Assigner Processes Quick Reference Guide
Part 2. Selecting Potential External Assessors

2018 ASSIGNER PROCESSES QUICK REFERENCE GUIDE

PART 2. SELECTING POTENTIAL EXTERNAL ASSESSORS

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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.

Email	academy@nhmrc.gov.au
Phone	1800 500 983 (or +61 2 6217 9451 for international callers)

2. Getting Started

2.1. Accessing Your Assigned Applications

How to Navigate

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*.

What it looks like

The screenshot shows the RGMS interface. The top navigation bar includes 'Main Menu', 'Favourites', and 'Assigners' (highlighted with a red box). Below this is the 'Overview: Assigners' section with a 'Quicklinks for Assigners' menu. The 'Managing assessor responses' sub-menu is highlighted with a red box. The 'Assignments - Assigners and Applications' page is shown below, with a filter section. The filter section includes fields for Round, Assigner, Application, and Assessment Type. The filter settings are: Declaration Complete? All, Col All, Assigned Yes, Active Applications Yes, and Assgner Suitability All. A red box highlights the filter settings and the 'Filter' button. A text box on the right provides instructions on how to set the filters.

Set the filters as shown:

- Declaration Complete – *All*
- Col - *All*
- Assigned – *Yes*
- Active Applications – *Yes*
- Assgner Suitability – *All*

Select *Filter*.

2.2. Viewing General Application Information

How to Navigate

What it looks like

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

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

The screenshot shows the 'Assigner Application List' interface. On the left, there are filter controls for Round, Assigner, Application, Assessment Type, Declaration Complete?, Col, Assigned, Active Applications, and Assigner Suitability. On the right, there are summary counts for Invitations, Resend, Accepted, Completed, Declined, Overdue, and Cancelled. The main table has columns for Application, Title, Application Team, and a summary of status counts. A red box highlights the 'Application' column, and another red box highlights the summary columns.

Application	Title	Application Team	Invitations	Resend	Accepted	Completed	Declined	Overdue	Cancelled
APP1 CIA -	3	0	2	2	1	0	0
APP1 CIA -	2	0	2	2	0	0	0
APP1 CIA -	2	1	2	2	0	0	0
APP1 CIA -	5	2	2	2	2	0	1
APP1 CIA -	5	1	2	2	2	0	1

The *Assigner Application: General - Properties* page will open.

How to Navigate

What it looks like

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.

The screenshot shows the 'Assigner Application: APP112 | CIA - [redacted] - General - Properties' page. The 'Application' and 'CI Publications' tabs are highlighted with a red box. A summary table on the right is also highlighted with a red box.

Invitations	4
Resend	3
Accepted	1
Completed	1
Declined	2
Overdue	0
Cancelled	0

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.

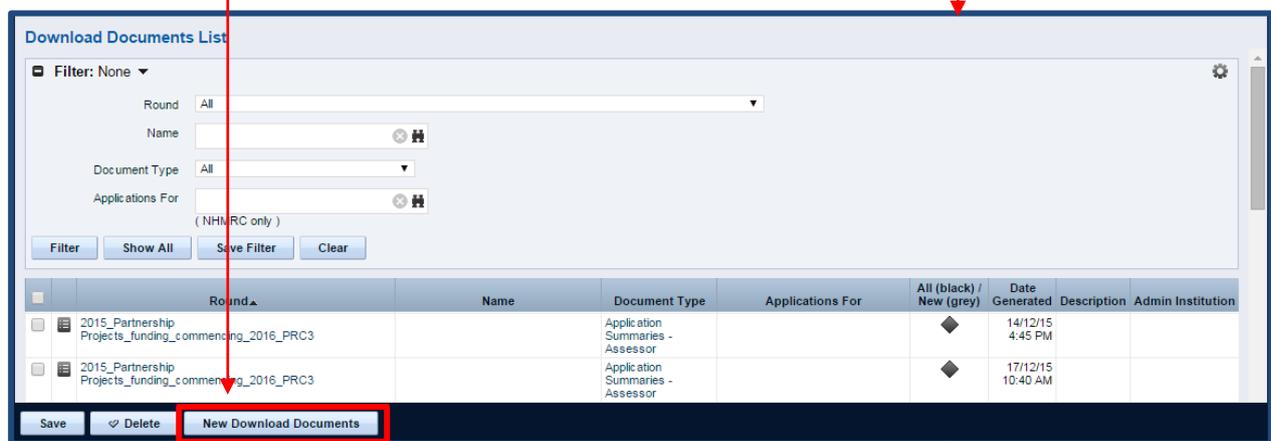
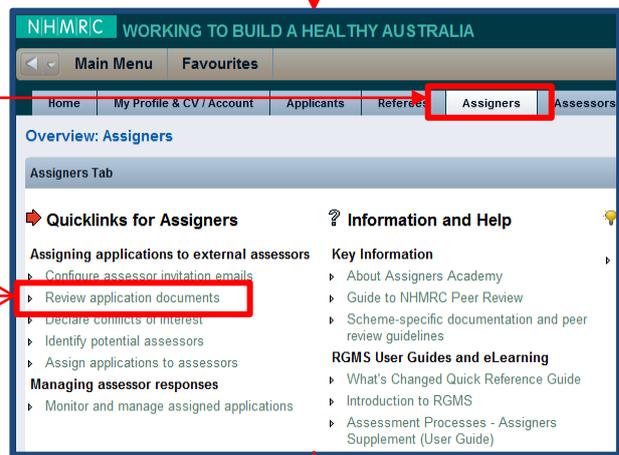
How to Navigate

What it looks like

From the *RGMS Home Page*, select the *Assigners* tab.

Under the *Quicklinks for Assigners* heading, select the *Review application documents* quicklink.

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.

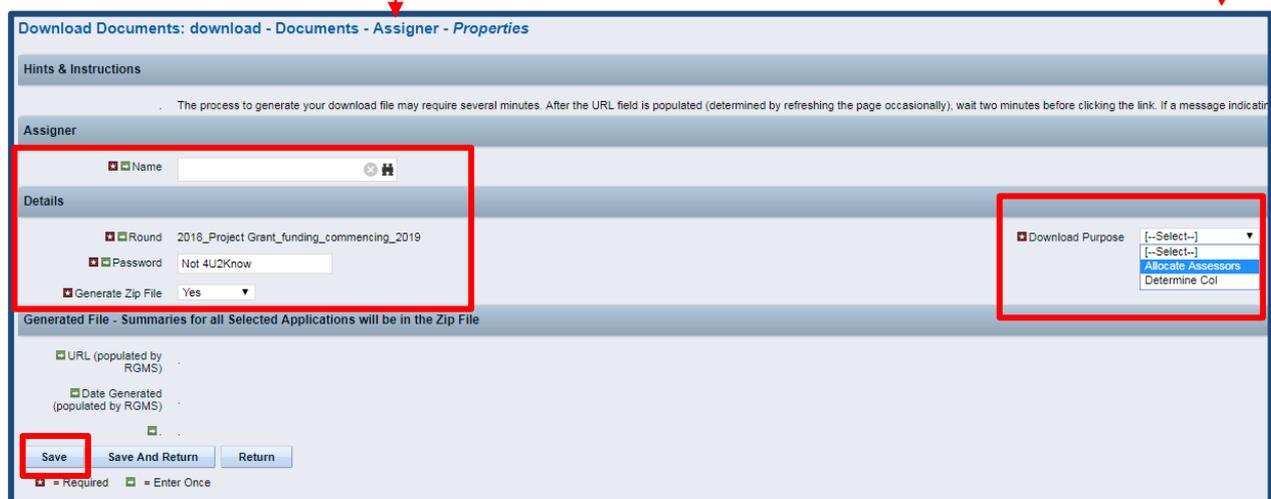
Hover over the *Properties* dropdown menu and select *Documents - Assigner*.



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).



How to Navigate

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.

What it looks like

The screenshot displays a web application interface. At the top, there is a password field labeled "Password" with the value "Not4U2Know". Below it is a "Generate Zip File" dropdown menu set to "Yes". A message states: "Generated File - Summaries for all Selected Applications will be in the Zip File". A red box highlights the "URL (populated by RGMS)" field, which contains the link: "https://www.rgms.nhmrc.gov.au/download/GMS-0772/summaries/..._GMS-0772_assign.zip". Below the URL, the "Date Generated (populated by RGMS)" is shown as "21/09/2016 15:08". There are three buttons: "Save", "Save And Return", and "Return". A legend indicates that a red square means "Required" and a green square means "Enter Once". At the bottom, a dialog box asks: "Do you want to open or save testassigner03_GMS-0827_assign.zip (273 KB) from rgmstest.nhmrc.gov.au?". The dialog has "Open", "Save", and "Save and open" options. A red box highlights the "Save as" option in the dialog.

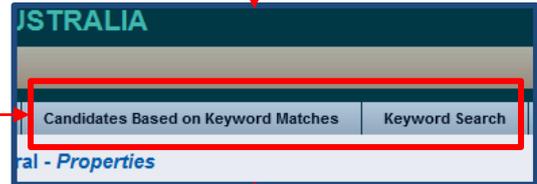
2.4. Identifying Potential External Assessors

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

What it looks like

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.

Assigner Application: APP11 | CIA - Professor - General - Candidates Based on Keyword Matches

Candidates Based on Matching Keywords with Application

Minimum Matches With Application: 3

Filter Save Filter Clear

Name	Institution / Keyword	Broad Research Area / Field of Research
+ [Name]	[Institution]	Basic Science
+ [Name]	[Institution]	Basic Science
+ [Name]	anxiety attention cognitive processes	Health Services Basic Science Clinical Medicine and Science
+ [Name]		COGNITIVE SCIENCE (Computer Perception, Memory and Attention) [current]
+ [Name]		OTHER MEDICAL AND HEALTH SCIENCES (Medical and Health Sciences not elsewhere classified) [current]
+ [Name]		OTHER PSYCHOLOGY AND COGNITIVE SCIENCES (Psychology and Cognitive Sciences not elsewhere classified) [current]
+ [Name]		Basic Science
+ [Name]		Health Services
+ [Name]		Basic Science
+ [Name]		Clinical Medicine and Science
+ [Name]		Clinical Medicine and Science
+ [Name]		Basic Science

+ = Required

Keyword Search

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

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Main Menu Favourites

Properties Application CI Publications Ineligible Candidates Candidates Based on Keyword Matches **Keyword Search** [Candidates Approaching Quota] [Processes]

Assigner Application: APP11 | CIA - Professor - General - Keyword Search

Assigners - Keyword Portlet Instructions

- You must enter a value in either the "Keyword Name Contains" filter field, or the field directly below it (ie the top left full keyword filter field)
- If you choose to use the "Keyword Name Contains" field, the portlet will return rows for people whose keywords/phrases contain your search criterion anywhere in the name. All other keyword fields are lookups and hence contain full keywords/phrases
- entering cancer (and leaving all other fields empty) will match keywords/phrases: acquired cancer, cancer, cancer care, etc.
- The six keyword lookup fields are to be treated as three rows of two fields. The portlet will match either value in a given row
- if the first row contains abortion in the left field and acidosis in the right (and all other filter fields are empty) people who have abortion and/or acidosis will be returned
- if multiple keyword filter rows contain values, the portlet will only return rows that satisfy the criteria in every row
- if the first row contains abortion in the left field and the second row has adrenaline in the left field (and all other fields are empty), only people who have both abortion and adrenaline will be returned
- if the first row contains abortion in the left field and acidosis in the right, and the second row has adrenaline in the left field (and all other fields are empty), rows will be returned for people who have adrenaline and also have either acidosis or abortion in their keyword list
- if you enter a partial keyword phrase and select one or more full keywords, you can choose how you want the results of the partial keyword match combined with the results of the full keyword criteria
- if you enter cancer as a partial keyword, abortion in the first row and adrenaline in the second, two sets of intermediate results will be built - one for rows that match cancer, and the other for rows that match both abortion and adrenaline. Then, choosing to combine the intermediate results will:
 - "and", will only return rows that are in both result sets (ie intersection)
 - "or", will return rows that are in either result set (ie union)
- Entering values in the other filter fields will restrict the rows returned from full and partial keyword matches (ie these criteria are anded with the keyword predicates)

Candidate Identification Based on Keywords

Keyword Name Contains: gene (eg cancer [do not include ''])

Keywords (RNA binding proteins) and (genetic engineering) and ()

Broad Research Area: Basic Science

Field of Research: GENETICS

Combine Partial and Full Keyword Matches Using: and (and - results contain partial and/or full name matches)

or () or () or ()

State: All (note a significant number of profiles do not contain a state value)

Name	Keyword 1	Keyword 2	Keyword 3	Keyword 4	Keyword 5	Keyword 6	Keyword 7	Keyword 8	Keyword 9	Keyword 10	Field of Research	Subcategory	Current?	Broad Research Area
[Name] (Associate Professor)	RNA	therapeutics	gene expression	genetic engineering	protein synthesis	protein engineering	post-transcriptional	RNA binding proteins	mitochondria	RNA metabolism	BIOCHEMISTRY AND CELL BIOLOGY	Synthetic Biology		Basic Science
[Name]	RNA	therapeutics	gene	genetic	protein	protein	post-	RNA binding	mitochondria	RNA	GENETICS	Gene Expression (incl. Microarray and other)	✓	Basic Science

How to Navigate

What it looks like

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*.

Candidate Identification Based on Keywords

Keyword Name Contains: gene (eg cancer [do not include *]). (a)

Combine Partial and Full Keyword Matches Using: and (and/or - results contain partial and/or full name matches) (b)

Keywords (c): RNA binding proteins, genetic engineering, RNA processing

Broad Research Area: All

Field of Research: [Empty]

State: All (note: a significant number of profiles do not contain a state value)

Name	Keyword 1	Keyword 2	Keyword 3	Keyword 4	Keyword 5	Keyword 6	Keyword 7	Keyword 8	Keyword 9	Keyword 10	Field of Research	Subcategory	Current?	Broad Research Area
[Redacted]	RNA	therapeutics	gene expression	genetic engineering	protein synthesis	protein engineering	post-transcriptional	RNA binding proteins	mitochondria	RNA metabolism	BIOCHEMISTRY AND CELL BIOLOGY	Synthetic Biology	✓	Basic Science
[Redacted]	RNA	therapeutics	gene expression	genetic engineering	protein synthesis	protein engineering	post-transcriptional	RNA binding proteins	mitochondria	RNA metabolism	GENETICS	Gene Expression (incl. Microarray and other genome-wide approaches)	✓	Basic Science
[Redacted]	RNA	therapeutics	gene expression	genetic engineering	protein synthesis	protein engineering	post-transcriptional	RNA binding proteins	mitochondria	RNA metabolism	MEDICAL BIOTECHNOLOGY	Medical Molecular Engineering of Nucleic Acids and Proteins	✓	Basic Science
[Redacted]	molecular biology	binding protein	protein engineering	gene regulation	gene therapy	genetic engineering	RNA binding proteins				MEDICAL BIOTECHNOLOGY	Medical Molecular Engineering of Nucleic Acids and Proteins	✓	Basic Science
[Redacted]	molecular genetics	genetic engineering	gene regulation	molecular biology	RNA binding proteins	RNA binding proteins	gene regulation	neuroscience			IMMUNOLOGY	Autoimmunity	✗	Basic Science
[Redacted]	molecular genetics	genetic engineering	gene regulation	molecular biology	RNA binding proteins	RNA binding proteins	gene regulation	neuroscience			GENETICS	Gene Expression (incl. Microarray and other genome-wide approaches)	✗	Basic Science
[Redacted]	molecular genetics	genetic engineering	gene regulation	molecular biology	RNA binding proteins	RNA binding proteins	gene regulation	neuroscience			IMMUNOLOGY	Immunogenetics (incl. Genetic Immunology)	✓	Basic Science

2.5. Final Steps

2.5.1. Verifying Eligibility

How to Navigate

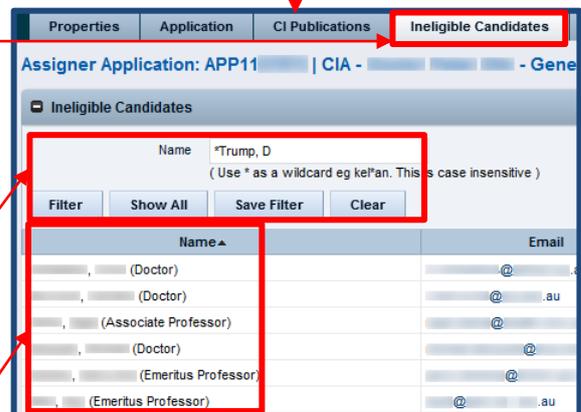
Access the *Assigner Application: General - Properties* page using the instructions in [Section 2.1](#).

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



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.



How to Navigate

What it looks like

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.

