

Research Management System

Requesting and Maintaining an RMS User Account

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Introduction

The Research Management System (RMS) is a web-based application developed by the ARC and now used by multiple agencies to manage their Grant Programs. Each agency can utilise functions such as: submissions, assignment and assessment, rejoinders, announcement, grant offers/acceptance, and post-award activities such as grant variations and project reporting.,

More detailed information on the agencies utilising RMS is available on the <u>Research Grant Services</u> page of the ARC Website.

RMS Access

The web address to access RMS is dependent on the agency or program that you are needing to interact with.

- ARC (NCGP) RMS instance https://rms.arc.gov.au
- DESE (NCRIS) RMS instance https://dese.researchgrants.gov.au
- ONI (NISDRG) RMS instance https://rmsoni.researchgrants.gov.au
- Defence (NISDRG) RMS Instance https://defence.researchgrants.gov.au

NOTE: you only need one account to access RMS, regardless of agency or program you are accessing, however you will require specific roles for each version/instance of RMS.

Key Points

- RMS is compatible with the latest versions of Google Chrome and Microsoft Edge. The
 Australian Research Council (ARC) cannot guarantee compatibility with other browsers or
 older versions of Google Chrome or Microsoft Edge.
- Your email address that you registered with is used to log in to RMS.
- Your password must be a minimum length of 10 characters and must contain at least three of the following categories:
 - lowercase alphabetic characters (a-z)
 - uppercase alphabetic characters (A-Z)
 - numeric characters (0-9)
 - special characters (!@#\$%&/=?.,:;\-)
- You must can only reset your password once every 24 hours. If you cannot remember your new password, you will have to wait 24 hours before trying again. However, RMS Support can override this if required.
- You must change your RMS password every 90 days. If you do not change your password within the 90 days, RMS will lock your account. Your account can be unlocked by requesting a Password Reset from any RMS Login Page or by contacting RMS Support. You do not need a new account when you change employment. Under Personal Details, you can change the

Administration Organisation for your account or update your email address at any time. Alternatively, you can ask <u>RMS Support</u> to update your account.

- All navigation in RMS originates from the RMS main menu page, known as the 'Action Centre'.
- Please note that all screenshots provided within this document have been obtained through the ARC instance of RMS and therefore differences may be evident between instances.

PART 1 – Requesting a New RMS account

NOTE: If you have ever been a participant on an ARC research application or acted as an assessor for the ARC, you will already have an RMS account. Please note your account may be inactive if you have not accessed it recently. If unsure, please contact <u>RMS Support</u>.

In addition, you do not need a new account when you change employment—See section $\underline{2.1.1}$ to transfer your account.

1.2 Submitting new account request

- Navigate to the relevant RMS instance Login page using the links as listed above:
- Click on Request New Account

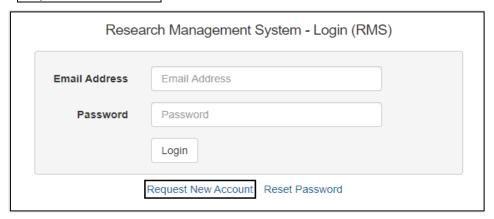


Figure 1.0 - RMS Login page

• The *Register New User* screen has two sections, Personal Details and Current Employment details (which are separated by a Recaptcha verification).

Personal details:

- Title
- First Name
- Second Name (not mandatory)
- Family Name
- Gender
- Date of Birth (not mandatory)
- Email
- Confirm email
- Organisation (Admin Organisation/Research Office/Lead Agent): This refers to the
 organisation that will administer your account. If one of the listed organisations employs
 you, or you are affiliated with it, select it to administer your RMS account.
 - ➤ If you are not affiliated with an available organisation within the list, please select the Australian Research Council to administer your account. You can update the Administration Organisation later if required. Alternatively, contact RMS Support for advice.

Note: Research office staff at the administering Organisation can view your details and are required to review all account requests.

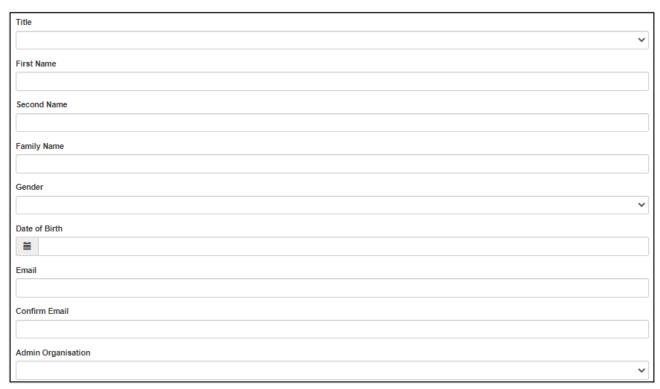


Figure 1.1 - New user account details - Personal

Recaptcha

- You will need to verify the Recaptcha before you can submit
- You should complete all details first before verifying, or the verification may expire.

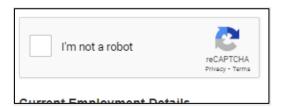


Figure 1.2 - New user account details – Recaptcha

Current Employment details:

- If you are currently unemployed, check the Unemployed box as this will disable the employment fields.
- Description (e.g. Director, Lecturer, Research Fellow etc)
- Department
- Contract Type: Contract or Permanent
- Employment Type: Full time or Part time (For Contract and Employment type, select the most applicable)
- Start Date

- End Date (leave this blank for current ongoing employment, or enter a future date for fixed term contracts)
- Organisation:

Enter your employers name in the available field, click search and select your organisation from the search results. You can also search for it by using the organisation's ABN or entering part of the name (ABN search is more reliable). If your organisation is not listed in RMS, click the here link (see Figure 1.4) in the pop-up message to add the name of your organisation, or contact RMS Support and ask for it to be added to RMS.

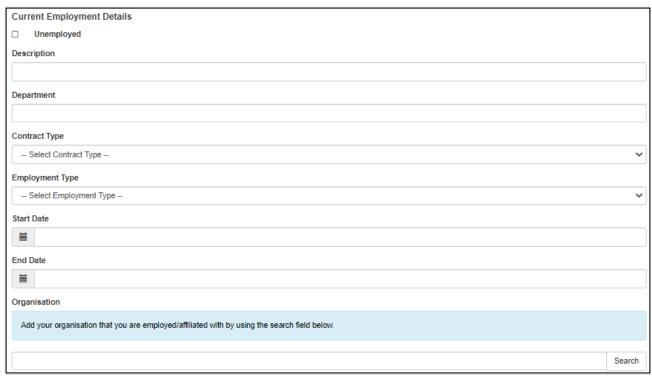


Figure 1.3 - New user account details - Current Employment Details

If your organisation is not available using the above search field, click here to add the name of your organisation that you are employed/affiliated with.

Figure 1.4 - Request to add organisation - Current Employment Details (continued)

- Once details are complete and you have verified using the Recaptcha Click Register
- A notification screen will appear advising that your request has been successfully submitted.

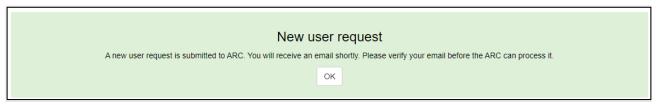


Figure 1.5 - Confirmation that request is successful

1.2 Verify your email address

 After you have Registered, RMS will send you an automatic email with a link to verify your email address: Click here to validate your email address

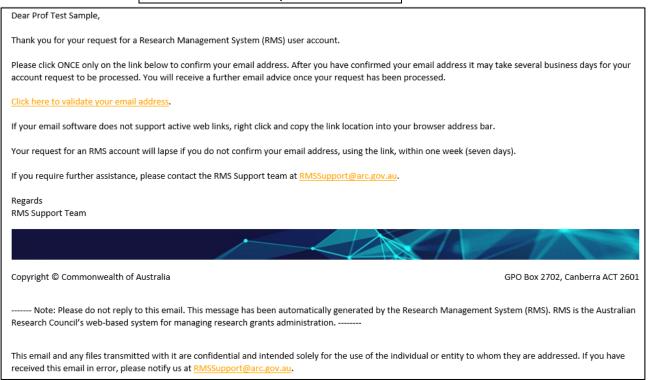


Figure 1.6 - Validation email for new account requests

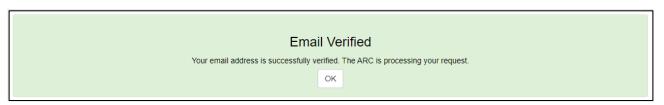


Figure 1.7 - Confirmation of email verification

 Following email verification, if you requested via ARC-RMS and selected a research organisation to administer your account, the request will first go to that organisation's research office to endorse. If the research office endorses your request, it will then come to the RMS Support team for final approval. Requests from other RMS Agents come direct to the ARC for approval.

NOTE: Your account does not exist until the ARC has approved it. You cannot log on or request a password before your account is approved.

It may take several business days for the Research Office and/or the RMS Support Team to process and approve the account request.

1.3 Approval or rejection of your account request

- If the ARC approves your account request, RMS will send a second automatic email with a link to set your password:
- To setup your initial login details in RMS, click here.

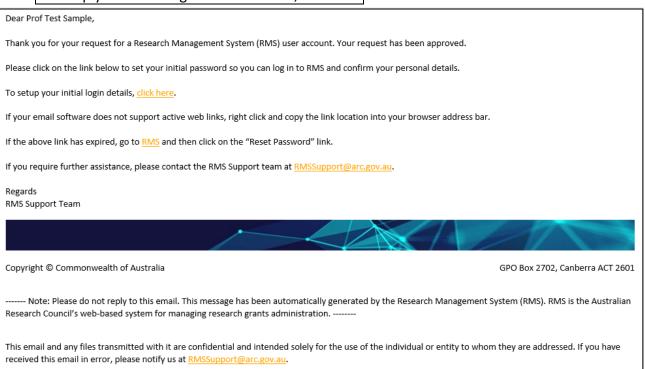


Figure 1.8 - Example of account approval email

Please note the password requirements when creating your new password.

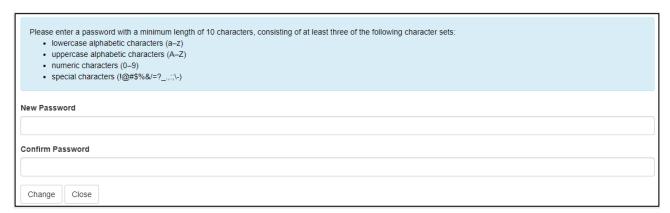


Figure 1.9 - Set Password Screen

If either the research office or the ARC rejects your account request, RMS will send an automatic email with a reason for the rejection. The most common rejection reason is a pre-existing account. If required, contact RMS Support for assistance to update and access your existing account. You do not need a new account when you change employment or to access a different agency.

Note: Once you have set your initial password, it is important to log onto RMS and complete your Person Profile, especially if you are applying for grant funding. See Part 2.

PART 2 Completing / Maintaining Your Person Profile

All users should periodically check their profile and update/add information where applicable.

The information contained in your RMS profile is used not only for statistical reporting but also to:

- populate personal, employment and qualifications information into applications,
- determine eligibility (if you are an applicant); and
- match your expertise to applications if you are an assessor.

Note: Not all fields are mandatory in the client profile, but some will become mandatory if you apply for a grant as they are used populate the grant application and to determine eligibility.

2.1 Personal Details

First, select Personal Details from the Person Profile menu



Figure 2.0 - Person Profile options

The information you entered at registration is here and can be updated if necessary.

Additional Fields to complete:

Phone Number

Alternate Phone Number

Country of Birth – start typing country name then select from the displayed list.



Figure 2.1 – Personal details

ORCID Id: For Information on connecting your ORCID Id please see the separate guide: *Research Outputs in RMS—Instructions for adding Research Outputs to your RMS Profile* available on the RMS Information page of the ARC Website.

The following fields collect additional demographics required for reporting purposes and information that may be used to verify that you meet the specific eligibility requirements of the grant program you are applying for.

- Gender select from the list.
- Indigenous Status (mandatory) select from the list
- Citizenship (mandatory) multiple entries are allowed. Start typing the country and select from the options provided, then click the "Add" button.



Figure 2.2- Set Citizenship Countries

• If you are not an Australian citizen, please complete the residency questions. If you answer Yes to Permanent Resident, the following three fields are disabled.

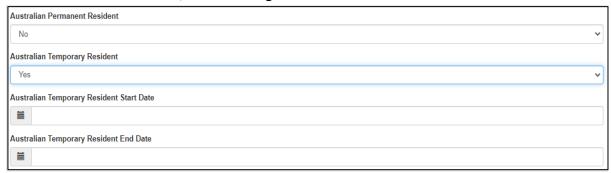


Figure 2.3- Residency Status

The final set of questions collects information regarding personal interest activities, conflicts of interest, and an acknowledgment that the personal information listed in your profile may be disclosed for the purposes of grant administration or legislative purposes.

Are you currently receiving any financial support (cash or in-kind) for research related activities from a country other than Australia?

Are you currently, or have you previously been, associated or affiliated with a talent recruitment program from a country other than Australia?

Are you currently associated or affiliated with a government, political party, government owned enterprise, military or police organisation in a country other than Australia?

For these three questions:

- Multiple entries are allowed.
- If you select Yes, you will be prompted to search/select and add the country, then provide details.
- Start typing the country and select from the options provided, then click the "Add" button. This will prompt you to add the name of the organisation providing the funding and provide a summary of the type of financial support received.
- Add additional countries as needed.

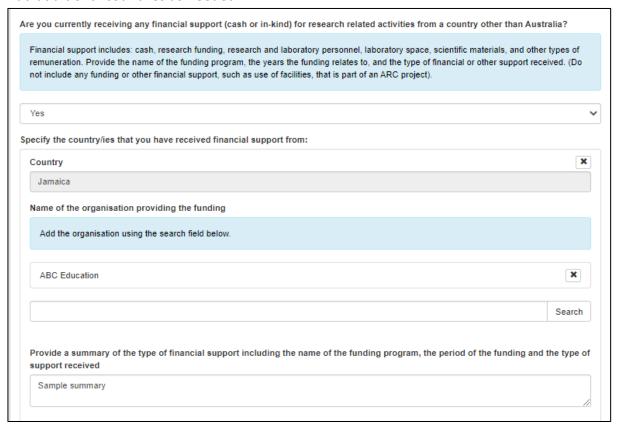


Figure 2.4 - Foreign financial Support example

Finally, complete the declaration.

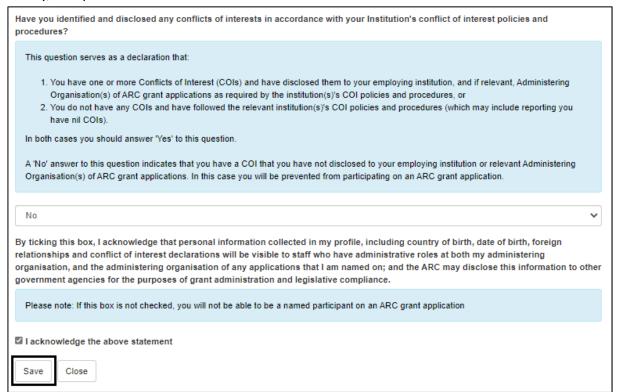


Figure 2.5 - Declaration

Save and close.

2.1.1 Transferring your RMS account to a different Organisation

- You can transfer administration of your RMS account to a new Organisation by clicking on Personal Details under the Person Profile section of the Action Centre.
- Under the Organisation section (Admin Organisation/Research Office/Lead Agent) of the
 Personal Details page, select a new Organisation to administer your account from the list.



Figure 2.6 – Transfer of Administering Organisation

• Once the new Organisation is selected, click Save at the top or bottom of the page. The account will automatically transfer to the new organisation.

Note: If updating your Admin Organisation, you should also update your email address

2.2 Expertise and Fields of Research

- Your Expertise text and Fields of Research (FoR) codes are used to match assessors to applications and are also included in the application for research grants.
- Select Expertise and Fields of Research from the Person Profile Menu



Figure 2.7 - Person Profile Expertise and Fields of Research

Complete the details by entering your Expertise text and FoR Codes.



Figure 2.8 - Expertise and Fields of Research

- Your expertise text should NOT be a list of academic positions held.
- Align your expertise text with the following points:
 - ✓ My major area of research expertise is in x, y, z...
 - ✓ I also have experience in research a, b, c...
 - ✓ I would also be able to assess in the areas of......
- FoR Codes: select between six and ten FoR codes

Note: 2008 FoR codes will continue to be utilised in applications and assessments until 2021. Please ensure that both 2008 and 2020 FoR codes are available within your profile.

- Use the FOR Codes search to find the codes closest to your area of expertise.
- Start typing the text or the FoR code, select from the options that match your search, then click the "Add" button. Repeat to add more codes.

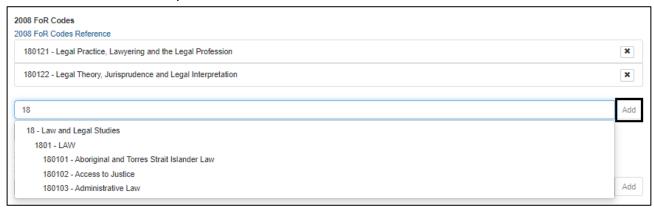


Figure 2.9 - Adding Fields of Research

Convert to 2020 FoR codes

- If you add 2008 FoR codes, they can be converted to 2020 FoRs using this option.
 - This screen shows you the mapping of 2008 FoRs to 2020 FoRs and you can either select to confirm only the direct one to one mappings or confirm all suggested mapping, adding them to your profile. Alternatively, you can select then confirm or remove codes one at a time.

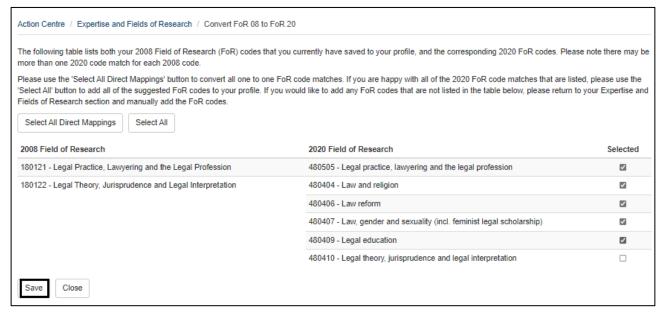


Figure 2.10 - Convert to 2020 Fields of Research

Click on Save after updating your details.

2.3 Qualifications

- Click on the Qualifications link from the Person Profile menu.
- To add qualifications, click on Add Qualification.



Figure 2.11 Adding a qualification

- Enter in your qualification details using the following fields:
 - Conferral Date
 - Australian Qualifications Framework Level (Further information about Australian Qualifications Framework levels is available at www.agf.edu.au)
 - Degree/Award Title
 - Discipline/Field
 - Awarding Organisation
 - Country of Award
 - Click on Save after updating your details.
 - To add more qualifications, click on the Close to return to the Manage Qualifications page, then click the Add Qualifications link.



Figure 2.12 Entering in your qualifications

 The Manage Qualifications page lists each Qualification entry, and you can edit or delete as required.



Figure 2.13 - Managing and viewing your qualifications

2.4 Employment History

- Click on the Employment link from the Action Centre.
- To add employment records, click on Add Employment.



Figure 2.14 - Managing your employment history

- Enter in your employment details using the following fields:
 - Description
 - Department
 - Contract Type
 - Employment Type
 - Start Date
 - End Date (leave blank if employment is current/ongoing)
 - Organisation: Enter your employers name in the available field, click search and select your organisation from the search results. You can also search for it by using the organisation's ABN or entering part of the name (ABN search is more reliable). If your organisation is not listed in RMS, click the here link (see Figure 1.4) in the pop-up message to add the name of your organisation, or contact RMS Support and ask for it to be added to RMS.

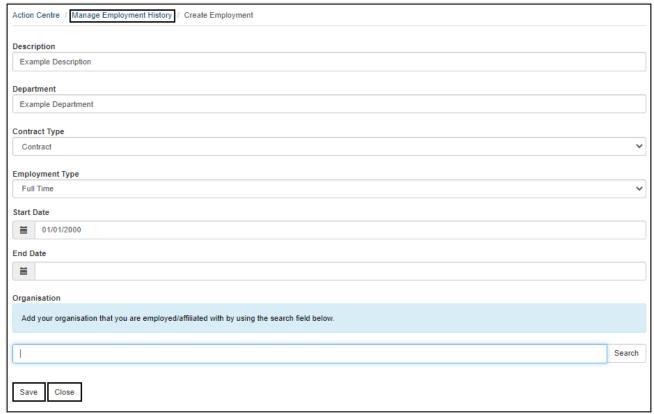


Figure 2.15 - Entering employment history

- Click on Save after updating your details.
- To add additional employment history, click Close to return to the Manage Employment History page, then click the Add Employment link.
- The Manage Employment History page lists each employment entry, and you can edit or delete as required.



Figure 2.16 - Managing and viewing your employment history

2.5 Assessor Availability

• Click on the Availability link of the Person Profile section of the Action Centre.



Figure 2.17 – Select Unavailability from Person Profile menu

To add new periods of unavailability click Add New Item.

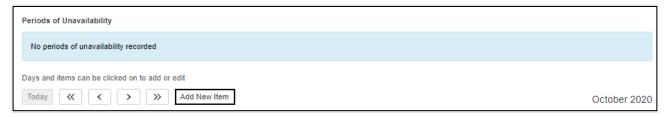


Figure 2.18 - Add New Item

Complete the details in the pop-up window – note that all fields are mandatory.

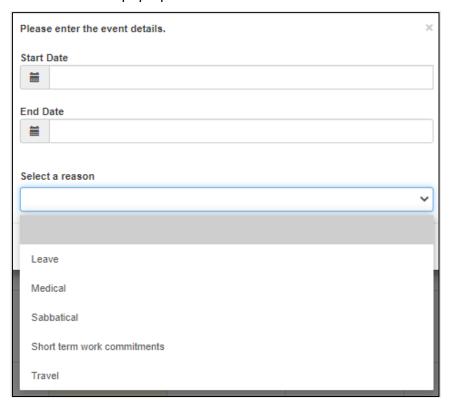


Figure 2.19 - Enter details of unavailability

• Once you have entered all the details, you will be able to see the period of unavailability listed against your profile.



Figure 2.20 - Viewing entered Unavailability

2.6 Current ARC Projects

This section displays information on any current ARC projects that you are a participant on. This is populated from within RMS and you cannot update this page.

2.7 Research Outputs

Please see the separate guide: *Research Outputs in RMS—Instructions for adding Research Outputs to your RMS Profile* available on the <u>RMS Information</u> page of the ARC Website.

PART 3 – Login, Navigation and Troubleshooting

3.1 Login to RMS

- To login to RMS navigate to the relevant RMS Login page using the links as listed in the <u>Key</u>
 Points section of this document.
- Enter the email address associated with your RMS account and your password. Click Login.

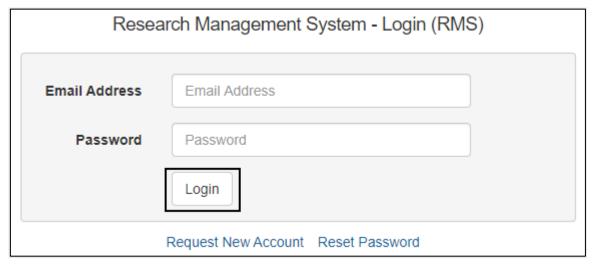


Figure 3.0 – RMS Login Page

3.2 Requesting a Password Reset

• To reset your password, navigate to the relevant RMS instance Login page using the links as listed in the Key Points section of this document. Click on Reset Password.

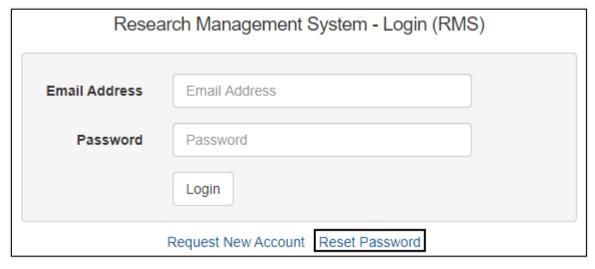


Figure 3.1 – Reset Password from Login Page

Enter the email address associated with your RMS account and click Request.



Figure 3.2 - Password reset - email address

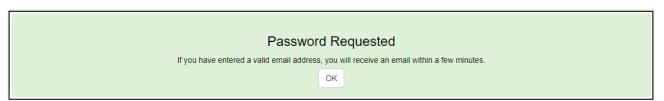


Figure 3.4 - Password reset - request confirmation

- If you cannot remember the email address associated with your RMS account, or you no longer have access to that email address, please contact RMS Support.
- RMS will send an automated email containing a link Click here to reset your password which will open the password reset page.

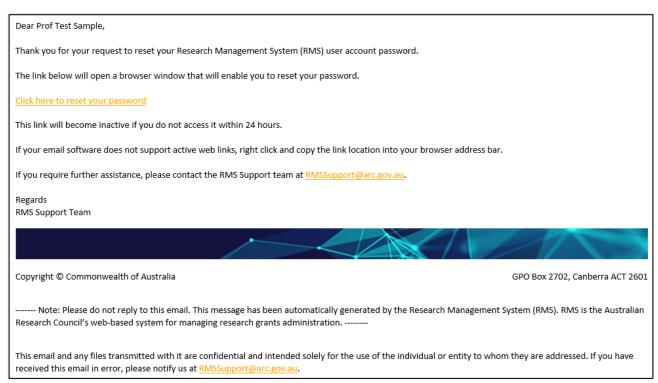


Figure 3.5 - Example of Password reset automated email

- A password must not be one of your last 8 passwords and must be a minimum length of 10 characters and must contain at least three of the following character sets:
 - lowercase alphabetic characters (a-z)
 - uppercase alphabetic characters (A-Z)
 - numeric characters (0-9)
 - special characters (!@#\$%&/=?_.,:;\-)

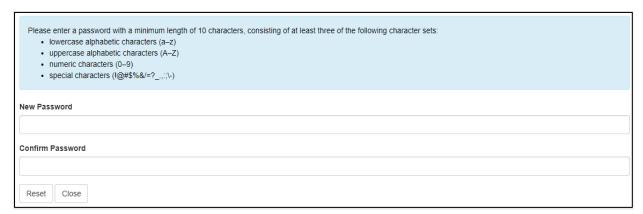


Figure 3.6 - Password Reset Page

Note: You can also change your password while logged into RMS by clicking on your name in the top right corner of RMS screen and selecting Change Password.

• Enter in your new password, and then click the Change Password. Note that when updating your password from within your profile, the RMS will log you out and you will be prompted to enter your new password to access your account.

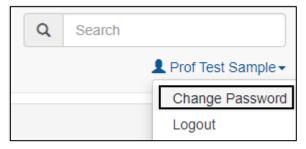


Figure 3.7 - Change Password Option

You can now login to RMS with your new password.

IMPORTANT NOTE:

You can only reset your password once every 24 hours. If you cannot remember the new password, you will have to wait 24 hours before trying again. However, <u>RMS Support</u> can override this if required

You must change your RMS Password every 90 days. If you do not change your password within the 90 days, RMS will lock your account.

Updating your password in one RMS instance will automatically update your password for all RMS instances.

3.3 Unlocking your account

- RMS will lock your account if you enter the incorrect password 5 times, or you have not updated your password for 90 days.
- You can unlock your account by requesting a Password Reset from the RMS Login Page (Section 2.2) or by contacting RMS Support



Figure 3.8 – Account Locked notification

3.3.1 Password troubleshooting

- A password must be a minimum length of **10** characters and **must** contain at least three of the following character sets:
 - lowercase alphabetic characters (a-z)
 - uppercase alphabetic characters (A-Z)
 - numeric characters (0-9)
 - special characters (!@#\$%&/=?_.,:;\-)
- Please ensure that you are using the latest version of either Google Chrome or Microsoft Edge. Other browsers may have compatibility issues.

It may also be worthwhile clearing any saved passwords in your browser that may be auto filling the login details.

3.4 RMS navigation

 On login you will see the main page called the Action Centre. The Action Centre will look different depending on the agency or program you have logged into, and what roles you have attached to your profile.

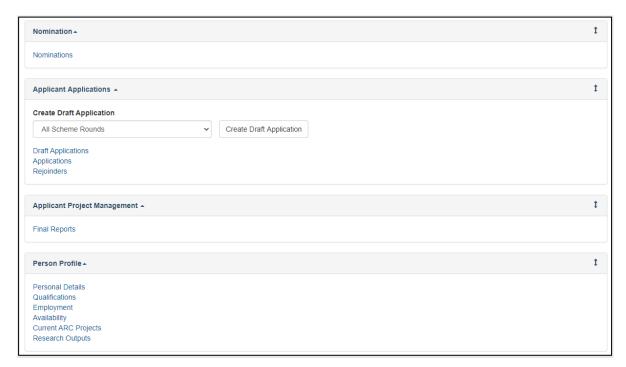


Figure 3.9 – Typical Action Centre for ARC-RMS

- You can navigate to the required functions via the Action Centre.
- You can tell where you are by the navigation path, also known as breadcrumbs, as shown in Figure 2.10. Navigate back to the Action Centre by clicking on the Action Centre link within the navigation path.

Action Centre / Manage Qualifications / Create Qualification

Figure 3.10 - Navigation Path – navigate back by the page links