Te Pūnaha Hihiko: The Vision Mātauranga Capability Fund

How to GUIDES

Adding team members in the Team section in MBIE’s Investment Management System (IMS)

Adding Individuals with the role Key researcher, Key individual and/or Placement

Assign a role to each team member. Choose from:
> Key researcher
> Key individual
> Placement
> Other.

At least **one** team member must be assigned to the **role of Key researcher**.

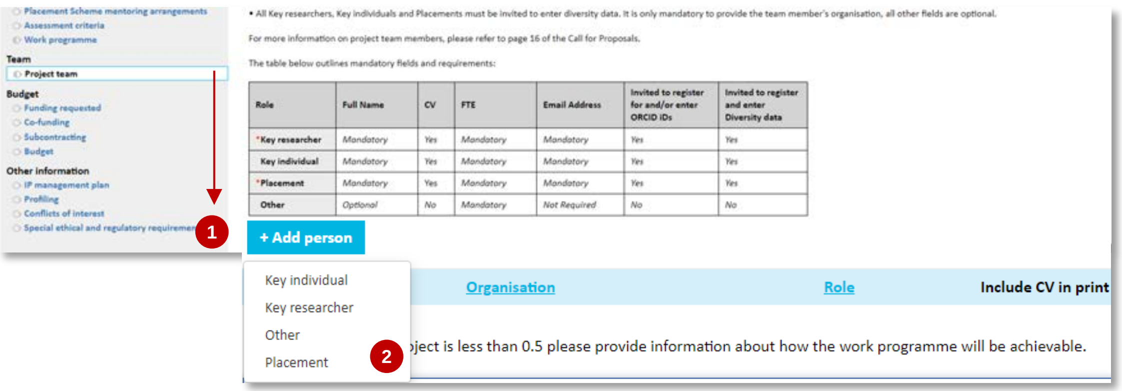
If applying for a *Placement scheme*, at **least one** team member must be assigned to the **role of Placement**.

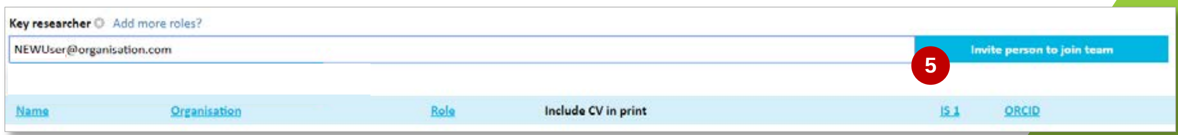
Assign the **Other** role to team members if a CV and/or ORCID registration is not appropriate or required.

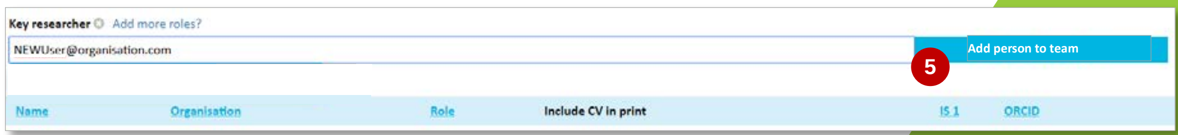
Enter each team member into the **Team** section individually.

In the **Team** > **Project team** section:

1. Click **+Add person**.
2. Select their role in the drop-down box.
3. Enter their email address.
4. Select the email address in the dropdown.
5. Click either:
   > **Invite person to join team** *(displays if they exist in IMS)*
   OR
   > **Add person to team** *(displays if they are new to IMS)*.







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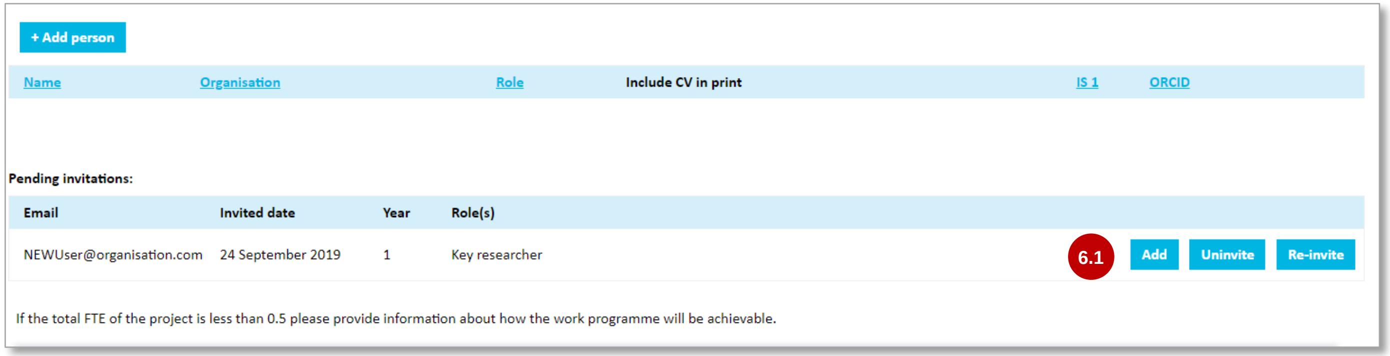
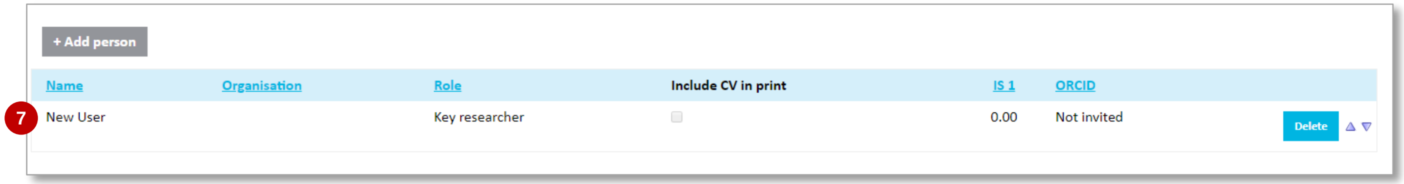
6. If you clicked **Invite person to join team** complete the following.
   If you clicked **Add person to team** go to step 7.
   6.1. Click **Add** next to their name.
   6.2. Enter their first name, last name and click **Create**.

   A system generated email will automatically be sent to the team member inviting them to register:
   > for IMS, and
   > their diversity information.

   Team members do not have to accept their diversity or IMS registration invitations for you to submit your funding application. Their acceptance will not affect the assessment of your application.

7. Click their name.



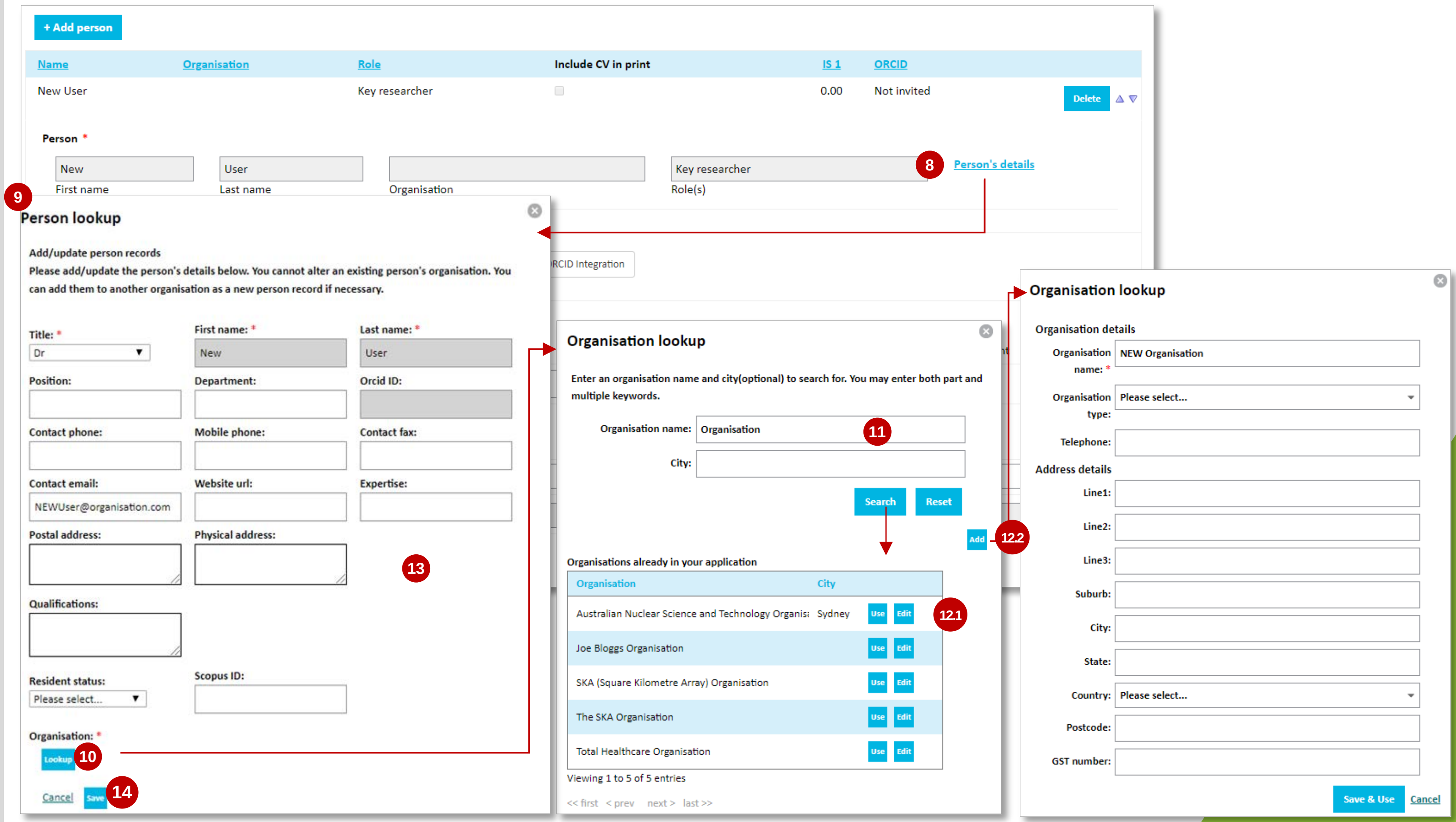


How to GUIDES

Adding team members in the Team section in MBIE's Investment Management System (IMS)

Adding Individuals with the role Key researcher, Key individual and/or Placement

8. Click **Person's details**. A **Person lookup** screen displays.
9. Complete the **Person lookup** screen with their details.
10. Under **Organisation**, click the **Lookup** button. An **Organisation lookup** screen displays.
11. Enter their organisation and click **Search**.
12. Scroll through the list of search results. If their organisation is:
    - 12.1. in the list, click the adjacent **Use** button. You will return to the **Person lookup** screen.
    - 12.2. not in the list, click **Add**. A secondary **Organisation lookup** screen displays. Enter the details of their organisation. When complete click **Save & Use** and you will return to the **Person lookup** screen.
13. Check all details on the **Person lookup** screen.
14. When complete, click **Save** to return to the **Team member** section.



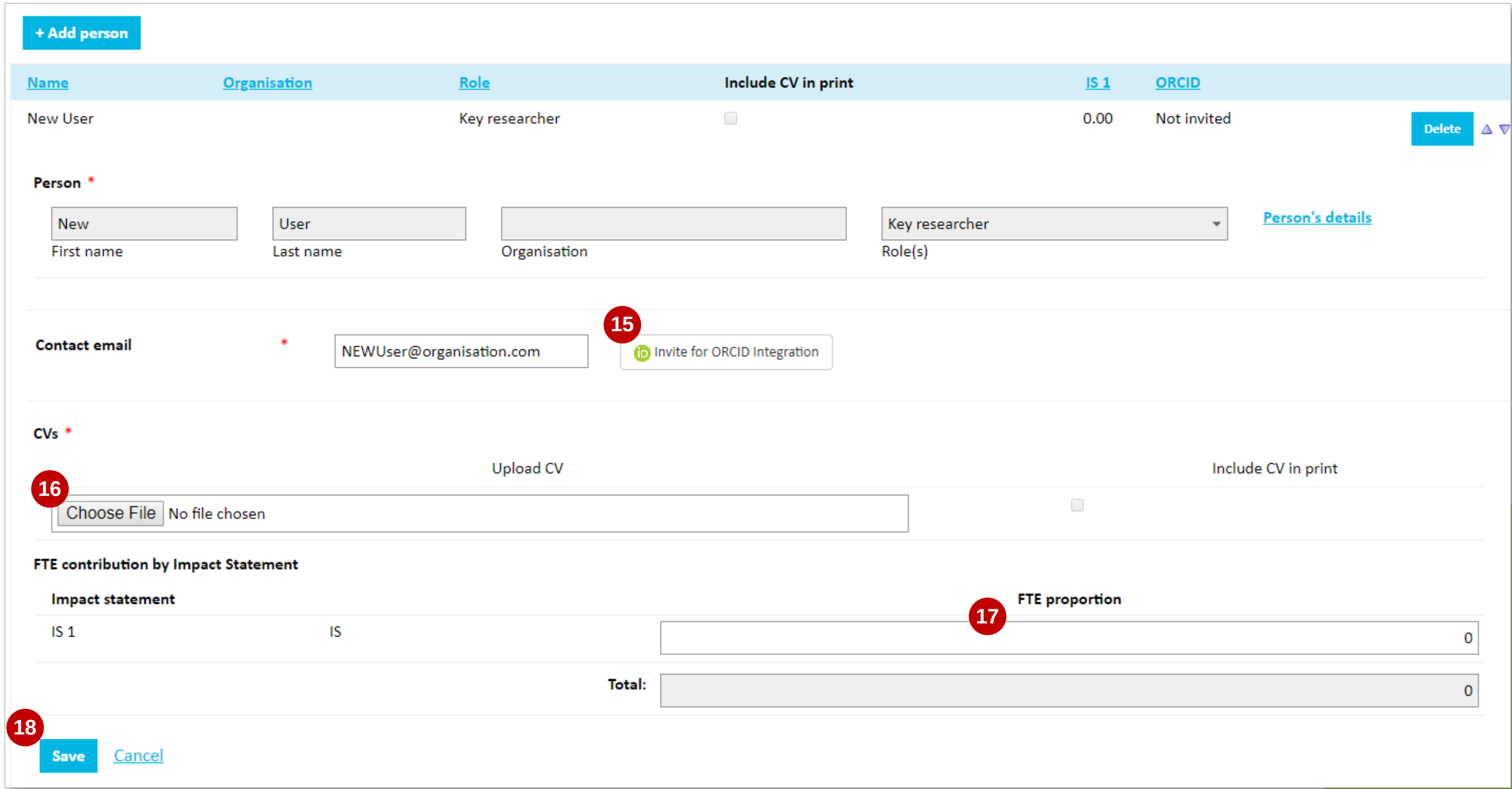
Adding team members in the Team section in MBIE's Investment Management System (IMS)

Adding Individuals with the role Key researcher, Key individual and/or Placement

15. Click **Invite for ORCID integration**.

    Team members do not have to accept their their ORCID registration invitations for you to submit your funding application. Their acceptance will not affect the assessment of your application.

16. Click **Choose** file, locate and upload their CV.
17. In the **FTE Proportion** field, overtype the default with their FTE.
18. When complete, click **Save**.
19. Repeat for all other team members in the role of Key researcher, Key individual and Placement following the on-screen prompts.



How to GUIDES

Adding team members in the Team section in MBIE's Investment Management System (IMS)

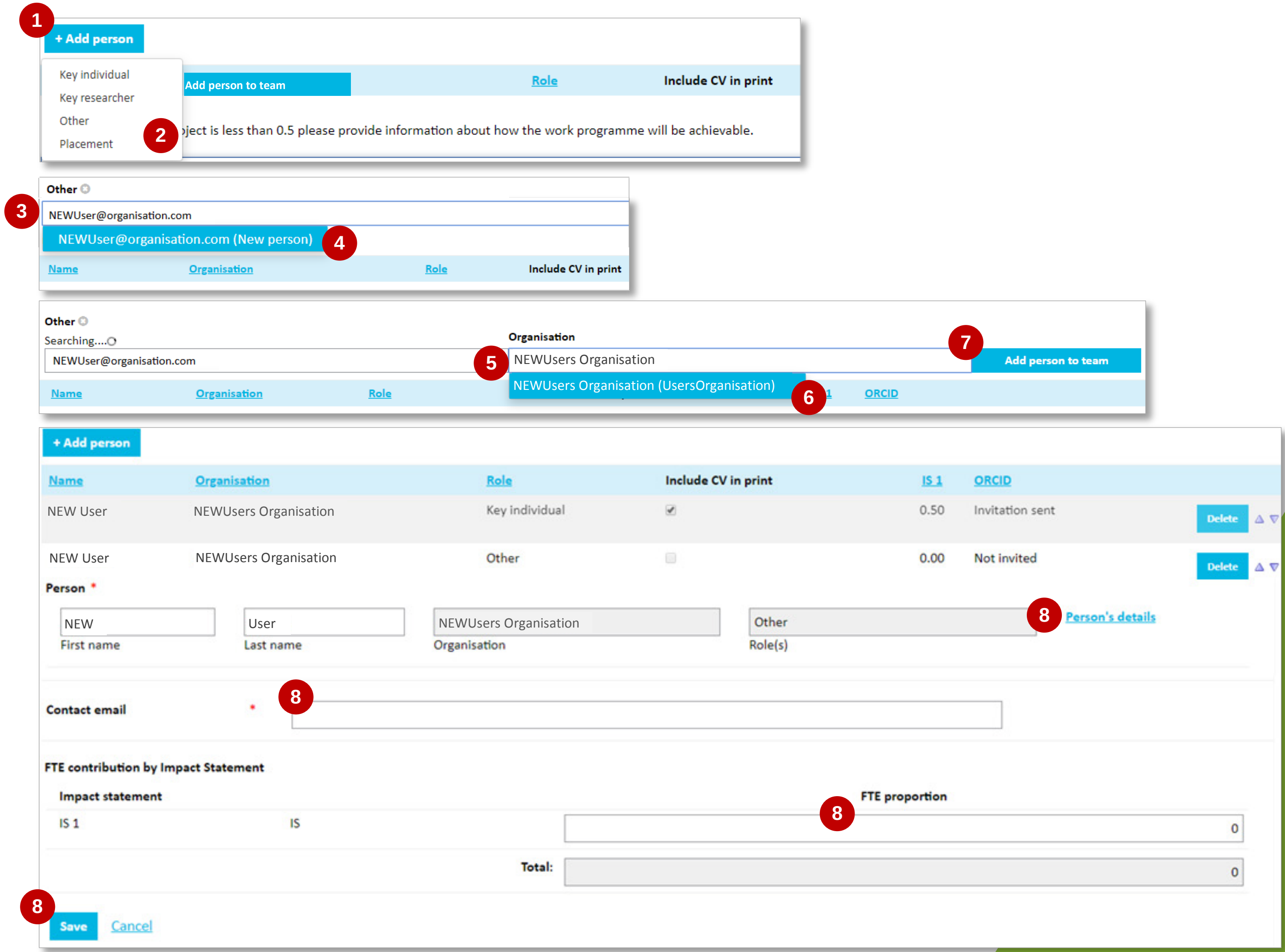
Adding Individuals with the role Other

Assign the **Other** role to team members if a CV and/or ORCID registration is not appropriate or required.

Enter each team member into the **Team** section individually.

In the **Team** > **Project team** section:

1. Click **+Add person**.
2. Select **Other** in the drop-down box.
3. Enter their email address.
4. Select the email address in the dropdown.
5. Enter their organisation.
6. Select their organisation from the drop down.
7. Click **Add person to team**.
8. Enter their details. When complete click **Save**.
9. Repeat for all other team members in the role of Other following the on-screen prompts.



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