

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).

Placement Scheme mentoring arrangements
 Assessment criteria
 Work programme
Team
 Project team
 Budget
 Funding requested
 Co-funding
 Subcontracting
 Budget
 Other information
 IP management plan
 Profiling
 Conflicts of interest
 Special ethical and regulatory requirements

All Key researchers, Key individuals and Placements must be invited to enter diversity data. It is only mandatory to provide the team member's organisation, all other fields are optional.
 For more information on project team members, please refer to page 16 of the Call for Proposals.
 The table below outlines mandatory fields and requirements:

Role	Full Name	CV	FTE	Email Address	Invited to register for and/or enter ORCID IDs	Invited to register and enter Diversity data
*Key researcher	Mandatory	Yes	Mandatory	Mandatory	Yes	Yes
*Key individual	Mandatory	Yes	Mandatory	Mandatory	Yes	Yes
*Placement	Mandatory	Yes	Mandatory	Mandatory	Yes	Yes
Other	Optional	No	Mandatory	Not Required	No	No

+ Add person

Key individual
 Key researcher
 Other
 Placement

Organisation Role Include CV in print

ject is less than 0.5 please provide information about how the work programme will be achievable.

Key researcher Add more roles?

NEWUser@organisation.com

NEWUser@organisation.com (New person)

Name Organisation Role Include CV in print

Key researcher Add more roles?

NEWUser@organisation.com

Invite person to join team

Name Organisation Role Include CV in print IS 1 ORCID

Key researcher Add more roles?

NEWUser@organisation.com

Add person to team

Name Organisation Role Include CV in print IS 1 ORCID

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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.

+ Add person

Name	Organisation	Role	Include CV in print	IS 1	ORCID
Pending invitations:					
Email	Invited date	Year	Role(s)		
NEWUser@organisation.com	24 September 2019	1	Key researcher		

If the total FTE of the project is less than 0.5 please provide information about how the work programme will be achievable.

Pending invitations:

Email	Invited date	Year	Role(s)				
NEWUser@organisation.com	24 September 2019	1	Key researcher	Enter First Name	Enter Last Name	Create	Cancel

+ Add person

Name	Organisation	Role	Include CV in print	IS 1	ORCID
New User		Key researcher	<input type="checkbox"/>	0.00	Not invited

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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.

The screenshots illustrate the following steps:

- Step 8:** A table with columns: Name, Organisation, Role, Include CV in print, IS 1, ORCID. A 'Person's details' link is next to the 'New User' entry.
- Step 9:** The 'Person lookup' form with fields for Title, First name, Last name, Position, Department, Orcid ID, Contact phone, Mobile phone, Contact fax, Contact email, Website url, Expertise, Postal address, Physical address, Qualifications, Resident status, Scopus ID, and Organisation. A 'Lookup' button is at the bottom.
- Step 11:** The 'Organisation lookup' search form with fields for Organisation name and City, and a 'Search' button.
- Step 12.1:** A table of 'Organisations already in your application' with columns for Organisation and City, and 'Use'/'Edit' buttons for each entry.
- Step 12.2:** A secondary 'Organisation lookup' form with fields for Organisation name, Organisation type, Telephone, Address details (Line1-3, Suburb, City, State), Country, Postcode, and GST number. A 'Save & Use' button is at the bottom.

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

Team members do not have to accept 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.

The screenshot shows the 'Add person' form in the MBIE IMS. At the top, there is a '+ Add person' button. Below it is a table with columns: Name, Organisation, Role, Include CV in print, IS 1, and ORCID. A row for 'New User' is shown with Role 'Key researcher', 'Include CV in print' unchecked, 'IS 1' as 0.00, and 'ORCID' as 'Not invited'. A 'Delete' button is on the right.

The form fields are as follows:

- Person ***: Fields for First name (New), Last name (User), Organisation, and Role(s) (Key researcher). A 'Person's details' link is on the right.
- Contact email ***: Field with 'NEWUser@organisation.com'. A red circle '15' highlights the 'Invite for ORCID Integration' button.
- CVs ***: 'Upload CV' section with a 'Choose File' button (No file chosen) and an 'Include CV in print' checkbox. A red circle '16' highlights the 'Choose File' button.
- FTE contribution by Impact Statement**: A table with columns 'Impact statement' and 'FTE proportion'.

Impact statement	FTE proportion
IS 1	0
Total:	0

 A red circle '17' highlights the 'FTE proportion' input field.

At the bottom, there are 'Save' and 'Cancel' buttons. A red circle '18' highlights the 'Save' button.

How to GUIDES

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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.

The screenshots illustrate the following steps:

1. Clicking the **+ Add person** button.
2. Selecting **Other** in the role dropdown.
3. Entering the email address `NEWUser@organisation.com`.
4. Selecting the email address from the dropdown.
5. Entering the organisation name `NEWUsers Organisation`.
6. Selecting the organisation from the dropdown.
7. Clicking **Add person to team**.
8. Filling out the **Person's details** form, including:
 - First name: NEW
 - Last name: User
 - Organisation: NEWUsers Organisation
 - Role: Other
 - Contact email: *
 - FTE contribution by Impact Statement table:

Impact statement	IS	FTE proportion
IS 1	IS	0
Total:		0