

How to GUIDES

Adding team members in the Team section in our 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).*

• 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 **Organisation** **Role** **Include CV in print**

Key researcher

Other

Placement

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

How to GUIDES

Adding team members in the Team section in our Investment Management System (IMS)

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

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 | 6.1 | Add Uninvite Re-invite |

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 | <input type="text" value="Enter First Name"/> | <input type="text" value="Enter Last Name"/> Create Cancel Uninvite Re-invite |

6.2

+ Add person

| Name | Organisation | Role | Include CV in print | IS 1 | ORCID |
|-------------------|--------------|----------------|--------------------------|------|-------------|
| 7 New User | | Key researcher | <input type="checkbox"/> | 0.00 | Not invited |

Delete ▲ ▼

How to GUIDES

Adding team members in the Team section in our 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.

The screenshots illustrate the following steps:

- Step 8:** A table lists a 'New User' with role 'Key researcher'. A link for 'Person's details' is highlighted.
- Step 9:** The 'Person lookup' form is shown with fields for 'First name', 'Last name', 'Organisation', 'Title', 'Position', 'Contact phone', 'Contact email', 'Postal address', 'Physical address', 'Qualifications', 'Resident status', and 'Scopus ID'. A 'Lookup' button is highlighted.
- Step 10:** The 'Organisation lookup' search results are shown, listing organisations like 'Australian Nuclear Science and Technology Organisi: Sydney', 'Joe Bloggs Organisation', 'SKA (Square Kilometre Array) Organisation', 'The SKA Organisation', and 'Total Healthcare Organisation'. 'Use' and 'Edit' buttons are visible next to each entry.
- Step 11:** The 'Organisation lookup' form for adding a new organisation is shown, with fields for 'Organisation name', 'Organisation type', 'Telephone', 'Address details', 'Suburb', 'City', 'State', 'Country', 'Postcode', and 'GST number'. A 'Search' button is highlighted.
- Step 12.1:** The 'Use' button is highlighted on the search results table.
- Step 12.2:** The 'Add' button is highlighted on the search results table.
- Step 13:** The 'Person lookup' form is shown with a 'Save' button highlighted.
- Step 14:** The 'Person lookup' form is shown with a 'Save' button highlighted.

How to GUIDES

Adding team members in the Team section in our 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 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 IMS. At the top, there 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', IS 1 '0.00', and ORCID 'Not invited'. Below the table are form fields for 'Person *' (First name, Last name, Organisation, Role(s)), 'Contact email *' (with an 'Invite for ORCID Integration' button), 'CVs *' (with an 'Upload CV' button and 'Include CV in print' checkbox), and 'FTE contribution by Impact Statement' (with 'Impact statement' and 'FTE proportion' fields). Numbered callouts 15 through 18 point to the 'Invite for ORCID Integration' button, the 'Choose File' button, the 'FTE proportion' field, and the 'Save' button respectively.

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.

1 + Add person

| Key individual | Add person to team | Role | Include CV in print |
|----------------|--------------------|------|---------------------|
| Key researcher | | | |
| Other | | | |
| Placement | | | |

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

3 Other

| | | | |
|---------------------------------------|--|--|--|
| NEWUser@organisation.com | | | |
| NEWUser@organisation.com (New person) | | | |

4

| Name | Organisation | Role | Include CV in print |
|--------------------------|--------------|------|---------------------|
| NEWUser@organisation.com | | | |

5 Organisation

Searching...
NEWUser@organisation.com

6

| Name | Organisation | Role | Include CV in print | ORCID |
|--------------------------|-----------------------|------|---------------------|-------|
| NEWUser@organisation.com | NEWUsers Organisation | | | |

7 Add person to team

8 Person's details

| Name | Organisation | Role | Include CV in print | IS 1 | ORCID |
|----------|-----------------------|----------------|-------------------------------------|------|-----------------|
| NEW User | NEWUsers Organisation | Key individual | <input checked="" type="checkbox"/> | 0.50 | Invitation sent |
| NEW User | NEWUsers Organisation | Other | <input type="checkbox"/> | 0.00 | Not invited |

8 Person's details

NEW User

First name: NEW, Last name: User, Organisation: NEWUsers Organisation, Role(s): Other

Contact email: *

FTE contribution by Impact Statement

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

8 Save Cancel