NIHR
Research Management System Help
V1.3
Contents
(Note: the contents below are hyperlinked to the associated help section for easy navigation)

1. Process overview.......................................................................................................................... 4
2. What is the Research Management System.................................................................................. 5
3. How to register................................................................................................................................ 6
   3.1 Register as a new user .................................................................................................................. 6
3.2 Access the RMS ............................................................................................................................. 7
   3.1 Forgotten password ..................................................................................................................... 8
   3.1 Account lock out .......................................................................................................................... 8
4. The RMS Home page ...................................................................................................................... 9
5. Manage My Details ......................................................................................................................... 10
   5.1 Basic Information ....................................................................................................................... 10
   5.1.1 ORCID iD Wizard ................................................................................................................... 11
5.2 Update Research Outputs ............................................................................................................ 12
   5.2.1 ORCID Import of Research Outputs ....................................................................................... 12
6. The Research Outputs can now be selected in applications see section 7.4.................. 12
   5.2.2 Europe PMC import of Research Outputs ............................................................................. 13
   5.2.3 Manual Addition of Research Outputs .................................................................................... 13
3. The Research Outputs can now be selected in applications see section 7.4.................. 14
5.3 Update CV ..................................................................................................................................... 14
   5.3.1 Add Degree or Professional Qualification ............................................................................... 15
   5.3.2 Add Employment Record ....................................................................................................... 15
   5.3.3 Add Research Grant ............................................................................................................... 15
   5.3.4 New Application ..................................................................................................................... 16
5.4 Change Email .............................................................................................................................. 16
5.5 Change Password ......................................................................................................................... 16
6. How to confirm participation in a grant application and confirm the application as a participant ................................................................................................................................. 17
7. How to complete an online application .......................................................................................... 19
   7.1 Completing an online application .............................................................................................. 19
7.2 Managing an application ................................................................................................................ 20
7.3 Monitoring the status of an application ....................................................................................... 21
7.4 Selecting relevant publications and grants .................................................................................. 21
7.5 Electronic Signatures (Full applications only) ............................................................................. 22
7.6 Application submission ................................................................................................................ 23
8. How to complete an online review .................................................................................................. 24
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.1</td>
<td>Bypassing invitations</td>
<td>24</td>
</tr>
<tr>
<td>8.2</td>
<td>Responding to an invitation</td>
<td>24</td>
</tr>
<tr>
<td>8.3</td>
<td>Completing a review</td>
<td>25</td>
</tr>
<tr>
<td>9.</td>
<td>Panel meetings</td>
<td>27</td>
</tr>
<tr>
<td>10.</td>
<td>How to complete a progress report for an active grant</td>
<td>28</td>
</tr>
<tr>
<td>11.</td>
<td>Contact us</td>
<td>29</td>
</tr>
</tbody>
</table>
The above diagram describes the process, in a simplified format, for grants managed via the Research Management System (RMS).
2. What is the Research Management System

The Research Management System is a web based program management system that enables you to apply for, track and administer research grants online, as well as participate in reviews and download panel meeting documents. Researchers can also maintain a profile and curriculum vitae, which are used for applications and other administrative purposes.

*Note: Internet Explorer versions 8 and lower are no longer supported by the RMS.*
### 3. How to register

#### 3.1 Register as a new user

1. **Click** *Register* against the *CCF home page*.

2. **Enter your** organisational email address and **confirm**. Your email address will become your sign in user name. Please use your institute (not personal) email address for this. 
   *Note: If you are creating an account as a Public reviewer or Public co-applicant, you may use your personal email address to register. As a public reviewer or public co-applicant you must ensure to enter your organisation as PPI Representative.*

3. **Enter your** details. *Note: * enhances a mandatory field which must be completed. Please also ensure the Consent question is answered.

4. Ensure the Consent question entitled ‘Communication Preferences’ (situated at the bottom of the page) is answered.
5. Confirm the **Terms and Conditions** before submitting.

An email containing a link to create your password to subsequently gain access to the system will be sent to the previously entered email address once your registration details have been approved by a grant administrator. Please allow two working days for registration to be completed.

### 3.2 Access the RMS

1. Enter your **email** and **password** before clicking the **Login** button.

   If you are accessing the system for the first time, the Basic Information page will display. Once the relevant fields have been completed, press the **Save** button.

2. The account homepage will now display indicating access to the system.
3.1 Forgotten password

From the CCF home page click the Forgotten Password? Hyperlink.

Enter the email address with which you registered and click Submit.

An email containing instructions for resetting your password will be sent to the registered email address.

3.1 Account lock out

Persistent use (>3 attempts) of an incorrect password will lock your account; this is to protect you from attempts to access your data by a third party. If this happens you can request a new password via the forgotten password function.
4. The RMS Home page

<table>
<thead>
<tr>
<th>Menu option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Over view</td>
</tr>
<tr>
<td>My Applications</td>
<td>Displays in progress and submitted grant applications</td>
</tr>
<tr>
<td>My Co-applications</td>
<td>Displays Active/Complete/Closed grants where the user is a co-applicant</td>
</tr>
<tr>
<td>My Grants</td>
<td>Displays Active/Complete/Closed grants</td>
</tr>
<tr>
<td>My Review Responses</td>
<td>Displays reviews which can be responded to</td>
</tr>
<tr>
<td>My Reviews</td>
<td>Displays reviews</td>
</tr>
<tr>
<td>My Tasks</td>
<td>Displays tasks</td>
</tr>
<tr>
<td>Manage My Details</td>
<td>Displays user details</td>
</tr>
<tr>
<td>Contact Us</td>
<td>Contact an RMS administrator</td>
</tr>
<tr>
<td>Logout</td>
<td>Log out of the RMS</td>
</tr>
</tbody>
</table>
5. Manage My Details

Select Manage My Details from the left hand menu:

5.1 Basic Information

- **Note:** Public reviewers should enter PPI Representative in the Organisation field and Public Reviewer in the positions field.
- **Note:** Public co-applicants should also enter PPI Representative in the Organisation field.
NIHR System help

This page should be used to keep contact information up to date.

5.1.1 ORCID iD Wizard

The ORCID iD is a mandatory field for Lead Applicants which will addition to your contact record by either creating a new ORCID account or signing in to an existing ORCID account. Once linked research outputs can be pulled in against your contact record for selection against grant applications.

1. Click the ‘Add ORCID or register with ORCID’ hyperlink

![ORCID form]

2. Register for a new account and select ‘Authorise’

![ORCID sign in window]
3. Or if you already have a registration, sign in with your ORCID account and select ‘Authorise’.

5.2 Update Research Outputs

*Please be aware that you will only be able to select up to 10 relevant publications in application forms (where applicable). The RMS is designed to store all your publications against your contact record. You will still need to select those relevant to an application in the application form.*

5.2.1 ORCiD Import of Research Outputs

*We need the following information for any publications entered in ORCiD: authors, year of publication, title of publication and name of journal. If this information is not present in your ORCiD record, it will not pull into Grant Tracker. To address this, you should amend your ORCiD record. If for any reason this does not resolve the problem, you can enter publications manually, directly into the RMS.*

1. Select **My Research Outputs** from the left hand Menu followed by **Import**.
2. Select **Source: ORCiD** then **Select Records >>**.
3. If your ORCiD record is linked and you have works associated these will display in the import table. Select those you would like to import by selecting the check box next to the relevant outputs:

4. Select **Complete Import >>** then **Import**. An Import Complete popup will display. Click no if no more outputs need added. You will be returned to the Research Output search page.
5. If you update the outputs on your ORCiD Account. Select the output then **Refresh** to update the local data.
6. The Research Outputs can now be selected in applications see section 7.4.
5.2.2 Europe PMC import of Research Outputs

1. Select My Research Outputs from the left hand Menu followed by Import.
2. Select Source: Europe PMC then Select Records >>.
3. Search for your personal publications.

4. Select those you would like to import by selecting the check box next to the relevant outputs then click Complete Import >>.
5. Your selections will display. Click Import to complete.

5.2.3 Manual Addition of Research Outputs

1. Select New on the research outputs page.

2. Enter the relevant Title and Date. Only these fields will render in the PDF so enter as much data as you would like to show. Click Save.
3. The Research Outputs can now be selected in applications see section 7.4.

5.3 Update CV

Note: Public and PPI reviewers are not required to fill in CV details if not relevant to their participation.
5.3.1 Add Degree or Professional Qualification

- This page should be used to add your qualifications.
- *Please note: You will be unable to save your degree details if the ‘Subject’ field is left blank.*

5.3.2 Add Employment Record

This page should be used to add your relevant employment history.

5.3.3 Add Research Grant

Research grants managed by the CCF display automatically in this area.
• Other research grants can be added.

5.3.4 New Application

Takes the user to the new applications page where open funding rounds are displayed. See How to complete an online application for further details.

5.4 Change Email

1. Select Manage My Details > Change Email from the left hand menu.
2. Enter and confirm a new email.
3. Click Save to update.
4. An email will be sent to the new email address with a link to confirm the change.

5.5 Change Password

1. Select Manage My Details > Change Password from the left hand menu.
2. Enter **Current Password**.
3. Enter **New Password** and confirm.
4. Click **Change** to update.

### 6. How to confirm participation in a grant application and confirm the application as a participant

When a RMS contact is added as a participant for a grant application they will be sent an email requesting that they confirm participation and approve the application. To confirm and approve an application:

1. **Login** to the RMS by following the link in the email.
2. **Click Confirm or Reject** participation.
3) Once participation has been confirmed the participant should approve the application:

- **Edit** – Allows the participant to edit the application.
- **View/Print** – Generates a PDF version of the application for printing or downloading.
- **Reject** – Reject your participation. An email will be sent to the Lead applicant.
- **Approve** – Approve the grant. *Note: The lead applicant will be unable to submit an application until all participants have confirmed participation and approved the application.*
7. How to complete an online application

7.1 Completing an online application

1. Select **My Applications** from the left hand menu and click the **New Application button**.

![New Application button](image)

2. A list of open funding rounds will display along with further information about the funding round.

![Funding round list](image)

3. Selecting **Apply** will open an application form for completion.
   - Denotes a mandatory field.
   - **Previous** and **Next buttons** should be used to navigate between pages in the application.

![Previous and Next buttons](image)

- Remember to save your work often in case of computer problems. You can **save** and return to your application at any time before the closing date.

![Save and Save and Close buttons](image)

- Please note that all text boxes within an application form consist of a toolbar across the top containing formatting options. These text boxes can also be resized by dragging the bottom right hand corner.

![Text box with toolbar and resize option](image)
• An application can be printed at any time by closing the application and clicking the View/Print button.

### 7.2 Managing an application

Saving and closing an open application or selecting an application from the My Applications page will open the manage application page above:

The buttons on the right allow you to:

- Edit the application.
- View/Print a PDF copy of the application.
- Validate the application as complete prior to submission.
- Submit the validated application. This button is only available after successful validation.

The Menu items on the left:

- View history allows you to view changes made to an application. This can be useful for reviewing changes made by participants.
- Journal is a notepad function allowing participants to leave message and/or attachments for each other.
- Sign-off status reports on the progress of sign-off process by each of the participants.
7.3 Monitoring the status of an application

All grant applications, and their statuses, are listed on the My Applications section of the system.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round Closed</td>
<td>The funding round is closed to submissions</td>
</tr>
<tr>
<td>Round Closed, extension for this application</td>
<td>The funding round is closed but an extension has been given</td>
</tr>
<tr>
<td>Pre-submission</td>
<td>The grant has not been submitted and the funding round is open for submission</td>
</tr>
<tr>
<td>Returned</td>
<td>The grant has been returned for editing</td>
</tr>
</tbody>
</table>

7.4 Selecting relevant publications and grants

Where requested, each applicant should select the publications and grants that they would like to appear in the CV section of an application. Publications and grants are pulled in from individual ‘My Details’ pages. See section 5.2 for further details on updating your CV.

For most programmes a number of relevant publications and grants can be selected for each applicant. All other CV details will populate from the ‘My Details’ page of their RMS account. **If a co-applicant does not select any publications or grants then they will not pull through to the application.** This may have a detrimental effect during the assessment of the application as the Panel will not have any evidence of the applicant’s grant / publication record.

To select publications / grants each applicant must log into their own RMS account, open the application form they are participating on and navigate to the relevant publications/grants page. Clicking on the green button will add a row from which a publication can be selected from. Allows the order to be changed. Allows rows to be deleted. Changes should then be saved.

**Note:** *You will only be able to see your selected publications/grants on the online form. Printing the form will display all applicants’ publication.*
7.5 Electronic Signatures (Full applications only)

When submitting a full application, electronic approval from the relevant authorities within your contracting organisation is required **before the application deadline**.

The lead applicant should add any required signatories such as Head of Department and Director of Finance from the contracting organisations to the online RMS application form.

On addition the signatory will be sent an email with instructions and a link to the relevant application.

The signatory should review application then check the relevant access controlled electronic signature box.
The signatory should then save, close and approve the application on the details page. Until this is completed, the lead applicant will be unable to validate and submit the application.

7.6 Application submission

When the application form is complete it must be validated prior to submission. This will highlight any omissions in the form and allow these omissions to be corrected.

Please note the following when submitting an application:

- The Lead Applicant must be the one who creates the application, but it can be jointly completed by the Lead Applicant and any Joint lead applicants or co-applicants (participants).
- Participants may be added to the application. When a participant is added the RMS will automatically email them to invite their participation. Participants can decide whether to accept their inclusion, and later to consent to the application being submitted jointly in their name.
- Applicants and participants can manage their CVs in ‘My Details’. The CVs are automatically included in the application submission.
- You will be unable to submit an application until all participants have confirmed participation and approved the application.

Submit an application:

1) After successful validation the lead applicant may submit the application.
2) On submission:
   a. A grant application number is assigned to the application.
   b. The application enters the process of being considered for funding, which begins after the grant round closes.
NIHR System help

Following the close date of the grant funding round, submitted and approved applications for that round will be reviewed to decide their suitability for funding and lead applicants will be informed of the outcome of this process.

8. How to complete an online review

After an application has been submitted and validated it will be reviewed. Reviewers must declare all conflicts of interest prior to reviewing an application. If invited to review an application please follow the instructions below:

- Select My Reviews from the left hand menu.

8.1 Bypassing invitations

Some panel reviews will simply be sent the review details, bypassing the invitation process. In this case, your involvement will start at the completing a review stage (8.3).

8.2 Responding to an invitation

1. Click Click here against the review invitation row.
2. Select the review hyperlink:

3. Accept or Decline the Confidentiality document.
4. Review the project Synopsis.
5. You can accept or decline an invitation, or alternatively you can tentatively accept the invitation – if you would like to carry out the review but for some reason you are not confident you will have the time or opportunity to do so. If you respond tentatively, this means you permit the grant-making organisation to send you the review if they choose (for example, if they have difficulty finding another suitable reviewer). At this point, if you still cannot do the review, you may indicate this.
6. When you have accepted the invitation on the RMS, we will then dispatch the application form, on-line review form and other relevant documentation for you to view online. You will receive an email to confirm when you can view these documents online.

8.3 Completing a review

1. Select Review against the review to complete.

Note: some review types will require a selection of the review stage or your area of expertise. Please ensure you select the correct categories as comment sections differ depending on the selection. If you are unsure please Contact Us for clarification:
Also please note:  

- denotes the application has been returned to an applicant for editing.

2. Enter your comment in each section using Previous and Next buttons for navigation.

3. Once all fields are complete with your comments click Save and Validate.
4. The Submit Form button will activate if all mandatory fields have been completed.
5. Click Submit Form. A confirmation email will be received confirming submission.

Once submitted your review can be downloaded from the Submitted Reviews section of the RMS:

1. Displays the review summary in PDF format.
2. Displays other reviewers’ comments (only available for certain review types after outcomes have been assigned to the grant).
9. Panel meetings

You may be asked to attend a panel meeting as a reviewer to discuss applications and their reviews. You will be notified of requests to attend via email. As a meeting attendee, you may be asked to judge the application and reviews involved.

Prior to the meeting, application and review documents will be made available via the RMS from the Panel Meeting Documents page.

- Selecting the **Meeting Name hyperlink** will display the meeting documents.

1. All documents associated with a meeting are available for download by selecting a **document hyperlink**. *Please note: the applications available can be filtered by review type allocation.*
2. Selecting the 📄 **PDF icons** will download the Application and Review feedback documents in PDF format.
3. Selecting 📝 **comment** allows the meeting attendee to leave a comment about the application which is only visible to them.
10. How to complete a progress report for an active grant

After a grant has been reviewed, approved for funding and is active the applicant is required to report on progress of the project. An email will be sent to the lead applicant requesting the completion of a report.

1. To report on progress select My grants from the left hand menu.
2. Click open against the active grant to display grant details.
3. Select Reports.
4. When a report is available for completion the Edit hyperlink will be available. Select this to open the report for completion.

- Denotes a mandatory field.
- Previous and Next buttons should be used to navigate between pages.
- Remember to save your work often in case of computer problems. You can save and return to your report at any time.

5. When the report is complete click Submit Form.

Certain reports require a report document to be uploaded:
1. To upload the report, select **Upload**.
2. Click **Choose File** and select the **document** to upload.
3. Click the **Upload** button.

### 11. Contact us

If your query is not answered in these notes or you experience technical issues you may email us by selecting the **Contact Us** link within the Research Management System. We will endeavor to answer all queries within 2 working days.