Research Management System

User Guide—Introduction to RMS 2.0
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Introduction

• This is an introductory user guide for the transition to RMS 2.0.
• RMS 2.0 is a re-build of RMS. The upgrades from RMS to RMS 2.0 will make for a more user friendly, robust and flexible grants management system.
• The target audience for this user guide is the Research Office staff.
• The web address for accessing RMS 2.0 has not changed. You will be able to access RMS 2.0 via https://rms.arc.gov.au.
• RMS 2.0 will be compatible with the latest versions of Google Chrome and Microsoft Internet Explorer. Compatibility with different browsers or older versions of Google Chrome and Microsoft Internet Explorer is not guaranteed.

PART 1 – RMS 2.0 Significant Changes

Significant changes in RMS 2.0 include:

• Login is via email address.
• Invitations to participate on a proposal are done via a user’s email address and not the RMS Person ID.
• A person without an RMS 2.0 account can be invited to participate on a proposal.
• Reduced time for PDF generation.
• Application form now loads entirely and not by form parts which results in easier and quicker navigation through the proposal form.
• Navigate within the system via the Action Centre.
• Ability to bookmark progress within the application.
• Immediate on screen notification of issues that need correction.
• Research Office users have view access of accounts they administer. This does not include edit rights.
• Research Office approval is not required in RMS 2.0 for account transfers.
PART 2 – General

2.1 – Login for current RMS Users

- For current RMS Users there is no requirement to setup a new account.
- Login now requires the **current preferred email address** and your password.
- Current passwords have been migrated to RMS 2.0.
- Users can still access RMS after login via the **Legacy RMS Information** link within the Person Profile section of the Action Centre. Users will be required to login using their RMS User ID and password.
- To Login to RMS 2.0 navigate to the RMS Homepage [https://rms.arc.gov.au](https://rms.arc.gov.au).

![Figure 1.0 – RMS 2.0 Login Homepage](image)

- Enter your email address and your password. Click on the **Login** button.
2.2 – Resetting Your Password

- To reset a password navigate to the RMS 2.0 Homepage [https://rms.arc.gov.au](https://rms.arc.gov.au)
- Click on the Reset Password link.

![Reset Password from homepage](image)

**Figure 2.0 – Reset Password from homepage**

- Enter in your email address and click [Request](#).
- If the user is unable to remember which email address is linked to their account, their administering organisation can access this information for them. If the administering organisation is unable to locate the information, please contact the RMS help desk at [rms@arc.gov.au](mailto:rms@arc.gov.au).
- An automated email will be sent containing a link to enable the user to reset their password by clicking on [Click here to reset your password](mailto:).
Dear Prof Test Sample,

Thank you for your request to reset your RMS user account password.

The link below will open an RMS browser window that will enable you to reset your password.

Click here to reset your password

This link will become inactive if you do not access it within one week (seven days).

If the link has lapsed, please go to the RMS Home Page and request another password reset.

If your email software does not support active web links, right click and copy the link location into your browser address bar.

If you require further assistance, please contact the RMS Help Desk at rms@arc.gov.au.

Regards

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Figure 3.0 - Resetting a password automated email

- Your 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 (0-10)
  - special characters.
Figure 4.0 - Resetting a password automated email

- Enter in your new password and confirm and then click the Reset button.
- You will now be able to login to RMS 2.0 with your updated password.
2.3 – Updating your personal profile in RMS 2.0

The first time that users log in to RMS 2.0, they should check that all of their details within the personal profile are correct. There are several new fields within the personal profile and it is important, for statistical analysis, that these fields are populated with the correct information. This information is used for ARC reporting purposes and users will not be identified through these reports.

- On login users will be taken to their main page called the **Action Centre**.

![Figure 5.0 - The Action Centre](image)

- Users can navigate to the required areas to view and update details via the Action Centre.
- Users will be able to tell where they are by the navigation path, as shown in Figure 6.0. Users can navigate back to the Action Centre by clicking on the Action Centre link within the navigation path. By clicking on the Close button, users will be taken back to the previous page.

![Figure 6.0 - Navigation Path – Navigate back by the page links](image)
• Enter in your details via the Person Profile section in the Action Centre using the following links:
  – Personal Details
  – Qualifications
  – Employment.
• **New users** will be required to enter in all of their details to create a personal profile in RMS 2.0.
• For **current users**, not all of the details provided in RMS were migrated to RMS 2.0. Current users will need to check and enter their details to ensure their personal profile in RMS 2.0 is complete.
• **Current users** will need to enter in their Qualifications as this information was not migrated to RMS 2.0.
• **Current users** will need to check their Personal and Employment details, and update any blank fields where applicable.
• **Current users** can access their information stored in RMS by clicking on the Legacy RMS Information link under the Person Profile section in the Action Centre.

![Figure 7.0 - Accessing links to update your profile](image)
• **Personal Details:** Click on the **Personal Details** link to view and update your personal details. The following fields are listed in your personal details:
  
  – Title, First Name, Second Name, Family Name
  – Email Address, Phone Number, Alternate Phone Number
  – Date of Birth
  – Gender
  – Admin Organisation—for this field select the organisation that is to be the administrator of the account. This is usually the organisation that a person is affiliated with. Where a person is not affiliated with an organisation on the list the person must select the Australian Research Council
  – Languages other than English
  – Indigenous Status
  – Citizenship
  – Australian Permanent Resident
  – Australian Temporary Resident including Start Date and End Date
  – Expertise Text
  – Field of Research (FoR) codes.

• Click on **Save** after updating your details.
Figure 8.0 - Personal Details section
Qualifications: Click on the Qualifications link which will take you to a new screen. To add qualifications click on the Add Qualification button.

Enter in your qualifications details for the following fields:

- Conferral Date
- Australian Qualifications Framework Level (further information about Australian Qualifications Framework levels can be found at www.aqf.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 button or click on the Manage Person Qualification link, and then click on Add Qualifications button.

All of your qualifications will be listed in the Manage Person Qualification page.
2.4 – New Users - Requesting an account

• An account can be created via the request a new account link on the RMS Homepage.
• Navigate to the RMS Homepage: https://rms.arc.gov.au.
• Click on Request New Account.

![Figure 11.0 - RMS 2.0 Login Homepage](image)

• A new screen will appear to enter in details for the following fields:
  – Title, First Name, Second Name, Family Name
  – Gender
  – Date of Birth
  – Email, Confirmation of email
  – Admin Organisation—for this field select the organisation that is to be the administrator of the account. This is usually the organisation that a person is affiliated with. Where a person is not affiliated with an organisation on the list the person must select the Australian Research Council
  – Current Employment Details or check the Unemployed box—for the Organisation field please search for your organisation first, if your organisation is not listed then enter the name of your organisation in the text field provided.
• Click on Register.

Figure 12.0 Example of a new user account

• A notification screen will now appear advising that your request has been submitted.
• An automatic email will be sent to you asking for verification of the email via the [Click here to validate your email address](#) link.

• It may take several business days for the Research Office and the ARC to process and approve the account request.

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Dear Prof Test Sample,

Thank you for your request for an RMS user account administered by Australian Research Council.

Please click ONCE only on the link below to confirm your email address. After you have confirmed your email address it may take several business days for your account request to be processed. You will receive a further email advice once your request is approved.

[Click here to validate your email address](#)

Your request for a RMS account will lapse if you do not confirm your email address, using the link, within one week (seven days).

If you require further assistance, please contact the RMS Help Desk at [rms@arc.gov.au](mailto:rms@arc.gov.au).

If you have forgotten the user ID you created, go to the RMS Home Page and use the “Retrieve User ID” option.

Regards

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• A second automatic email will be sent to the user once the account has been approved.
• If the account has not been approved the user will receive an email listing the reason why.
• You will need to setup your password first by clicking on the [Click here to setup your initial login details] link within the second email sent to you.

![Approval email to user](image)

**Figure 15.0 Approval email to user**

• 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 (0–10)
  – special characters.
Once your password has been created you can login to RMS 2.0 and begin setting up your personal profile, as per Section 2.3 of this document.
PART 3 – Research Office Staff

3.1 – Manage Pending User Accounts

- When a user requests a new account to be created, the user must select an Administering Organisation for that account. A Research Office staff member from that Administering Organisation is then required to confirm that it is a new account and approve it.

- Any pending user accounts that are administered through your organisation will be listed within the User Management section of the Action Centre.

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**Figure 17.0 - Pending Users in the Action Centre**

- Click on the **Check Duplicates** button to check for any potential duplicate accounts and to approve the request.

- If there are any similar user accounts that are administered by your organisation, they will be listed in the Potential Duplicate Users screen. Click on the **Compare** button for additional details.

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**Figure 18.0 – Potential Duplicate Users and Approval**
Once the account details have been checked and it is confirmed that the request is for a new, non-duplicated account, click on the Approve button. You will be required to select one of the following role types for the user:

- Applicant
- Research Office Staff
- Research Office Delegate.

Click the Confirm Approve button. The account will then be processed by an ARC staff member.

If the details match those of an account that is currently in the RMS 2.0, click on the Reject button and provide a reason for the rejection.

### 3.2 – Manage User Accounts

- To view users for accounts administered by your organisation, click on the Manage Users link under the User Management section of the Action Centre.
- Search for an account by entering text into the Search field. Searches can be done on the user’s title, first name, family name or email address. The search can also be filtered based on the user’s role type.

![Figure 19.0 – Searching for users](image)

- Click on the View button to view the user’s account details.

In accordance with the Australian Government Information Security Manual, the ability to edit another user’s account details will not be available in RMS 2.0.
3.3 – Reports

- The reports that were available in RMS have been recreated in RMS 2.0. These are available under the Reports section of the Action Centre.

![Figure 20.0 - Reports](image)

3.4 – Transfer accounts to other organisations

- A user can transfer an account in RMS 2.0 by clicking on Personal Details under the Person Profile section of the Action Centre.
- Under the Admin Organisation section of the Personal Details page, the user can select the new Administering Organisation from the drop down menu.

![Figure 21.0 – Transfer of Administering Organisation](image)

- Once the new Administering Organisation is selected, click on the **Save** button at the top or bottom of the page. The account will automatically transfer to the new organisation.

The transfer of an account does not require any approval from the Administering Organisation in RMS 2.0.