

DkIT Research Application

System User Guide

Table of Contents

[1. Researcher Registration (Role: Researcher) 3](#_Toc402357266)

[1. Activating a Researcher (Role: System Admin - DkIT) 6](#_Toc402357267)

[1.1. Log in as the System Admin – DkIT or Research Officer. 6](#_Toc402357268)

[2. Researcher Portal (Role: Researcher) 11](#_Toc402357269)

[2.1. Edit your profile 12](#_Toc402357270)

[2.2. Create and submit a new research proposal 14](#_Toc402357271)

[2.2.1. Proposal Overview Tab 14](#_Toc402357272)

[2.2.2. Finance Tab 15](#_Toc402357273)

[2.2.3. Resources Tab 15](#_Toc402357274)

[2.3. Submitting a completed proposal 15](#_Toc402357275)

[2.4. Research Proposals Requiring Revision 16](#_Toc402357276)

[2.5. My Proposals in Preparation 17](#_Toc402357277)

[2.6. Final Proposal Upload 18](#_Toc402357278)

[2.7. Proposals ready for submission 19](#_Toc402357279)

[2.8. Uploading Post Award Documents 20](#_Toc402357280)

[3. Head of School Portal (Role: Head of School) 22](#_Toc402357281)

[3.1. Approving proposals 22](#_Toc402357282)

[3.2. Reviewed proposals 24](#_Toc402357283)

[4. Intellectual Property Manager Portal (Role: Intellectual Property Manager) 25](#_Toc402357284)

[4.1. Approving proposals 26](#_Toc402357285)

[5. Research Unit Director (Role: Research Unit Director) 27](#_Toc402357286)

[5.1. Assigning Research Unit Director 27](#_Toc402357287)

[5.2. Approving proposals (currently OPTIONAL) 28](#_Toc402357288)

[5.3. Reviewed proposals 31](#_Toc402357289)

[6. Finance Office Portal (Role: Finance Office) 32](#_Toc402357290)

[6.1. Approving proposals (NOT NEEDED ANYMORE) 32](#_Toc402357291)

[6.2. Reviewed proposals 34](#_Toc402357292)

[6.3. Activating a Researcher in the system 35](#_Toc402357293)

[7. Research Office Portal (Role: Research Office) 36](#_Toc402357294)

[7.1. Approving proposals 36](#_Toc402357295)

[7.2. Reviewing 2nd uploaded proposal 38](#_Toc402357296)

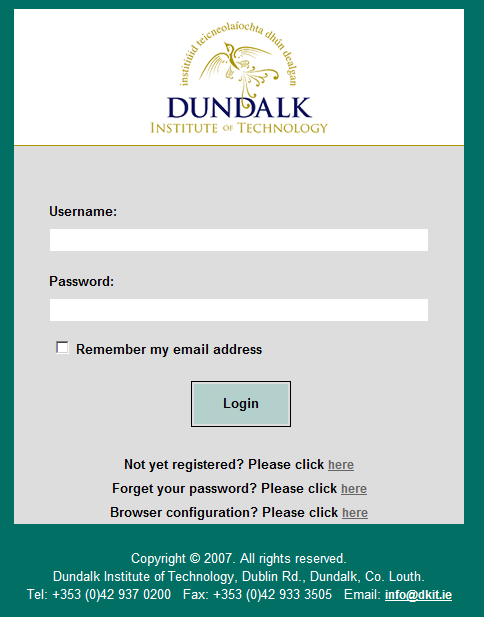
[8. Proposal at Award Status (Role: System Admin - DkIT) 40](#_Toc402357297)

[9. System Workflow 44](#_Toc402357298)

# Researcher Registration (Role: Researcher)

For the best system performance you should use the most recent version of **Internet Explorer** and **Firefox** browsers.

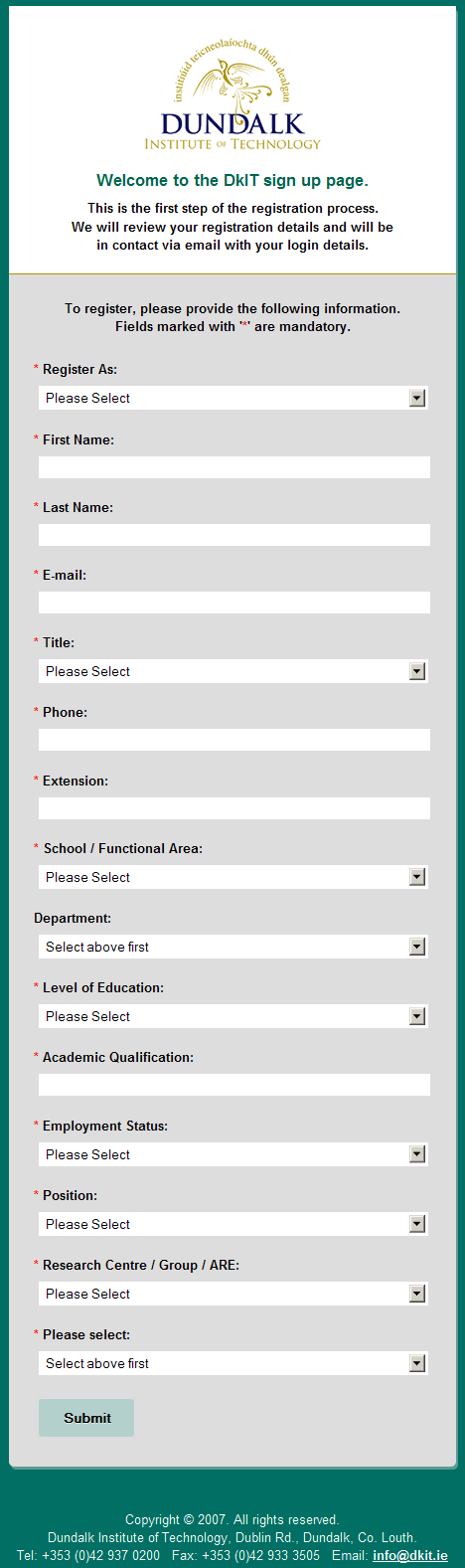
Firstly open the URL: <http://dkit.smartsimple.ie>



If you have not been registered before with the system as a Researcher, you must select the following link from the login page:

**Not yet registered? Please click here**

As a researcher you are presented with the following screen:



Once you filled out the following form and hit submit you are presented with the following screen:



Upon Approval by the DKIT Research Office you will receive an email with your username and password. This is not automated process so please be patient and wait until Research Office activate your account.

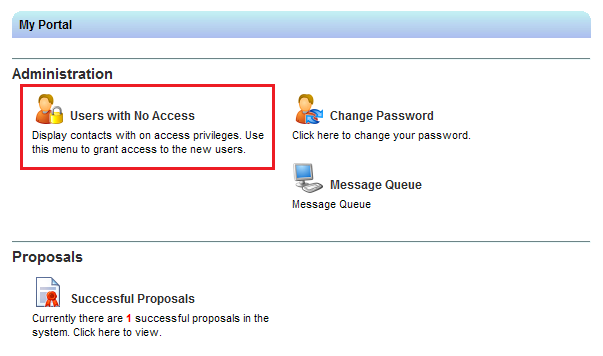
# Activating a Researcher (Role: System Admin - DkIT)

As the **System Admin - DkIT** you can check if there are new Researchers registered with the system, you will need to grant them access.

To do so please follow these steps:

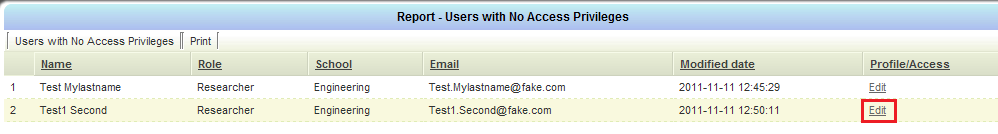
## Log in as the System Admin – DkIT or Research Officer.

You will be logged in to a portal view mode. **Icons** available may vary as the system is in build. Please select **Users with No Access**.

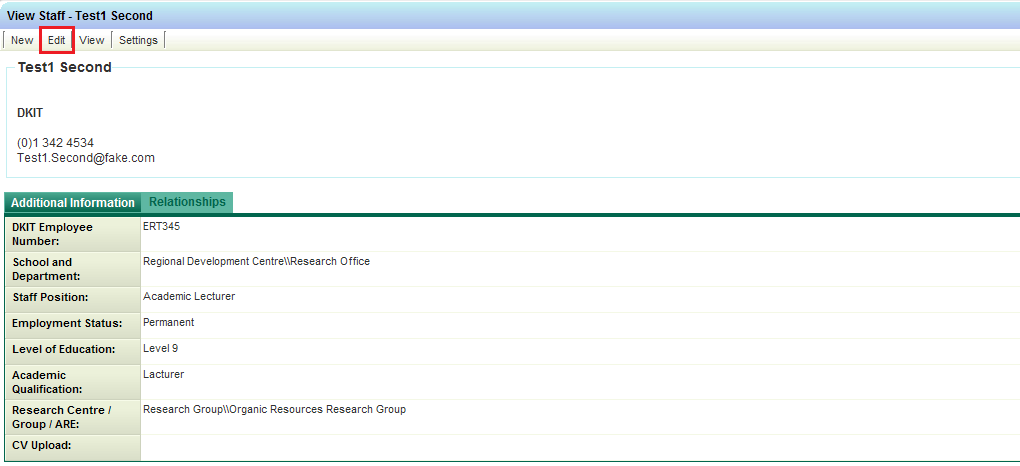


You will be presented with the following screen. You will be able to see people who have registered on the system to date and have no access privileges.

You will be able to see when somebody registered looking at the **Modified Date** column.

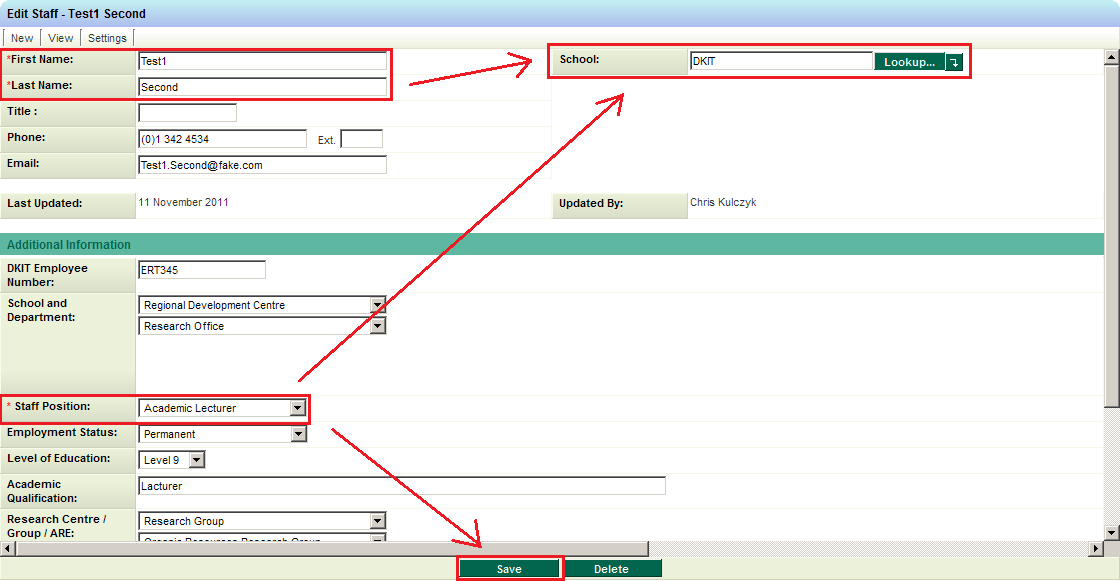


Click on Profile/Access **Edit** link to grant access to the system and you will be presented with the following screen:



Before you grant user with access please check and update their profile.

Click **Edit**.



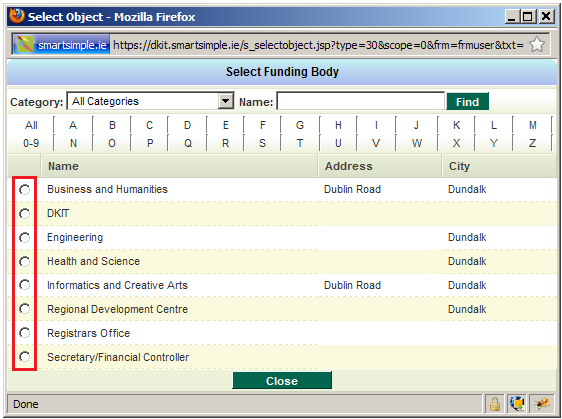
Make sure all mandatory fields are filled out. Mandatory field are marked with red asterix across the system.



Please pick **School/Funding Body** field. This filed is used to put a new contact on Internal Staff branch and cannot be left blank. This field is only editable by System Admin - DkIT.



Using **Lookup** button pick the correct location where user should be assigned to.



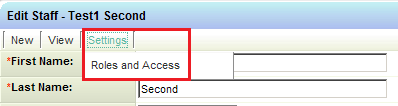
It is important to keep all user profiles up to date as some of their profile information is used automatically on a **Research Application**.

Once you checked and updated Researchers profile click **Save** at the bottom of the screen.

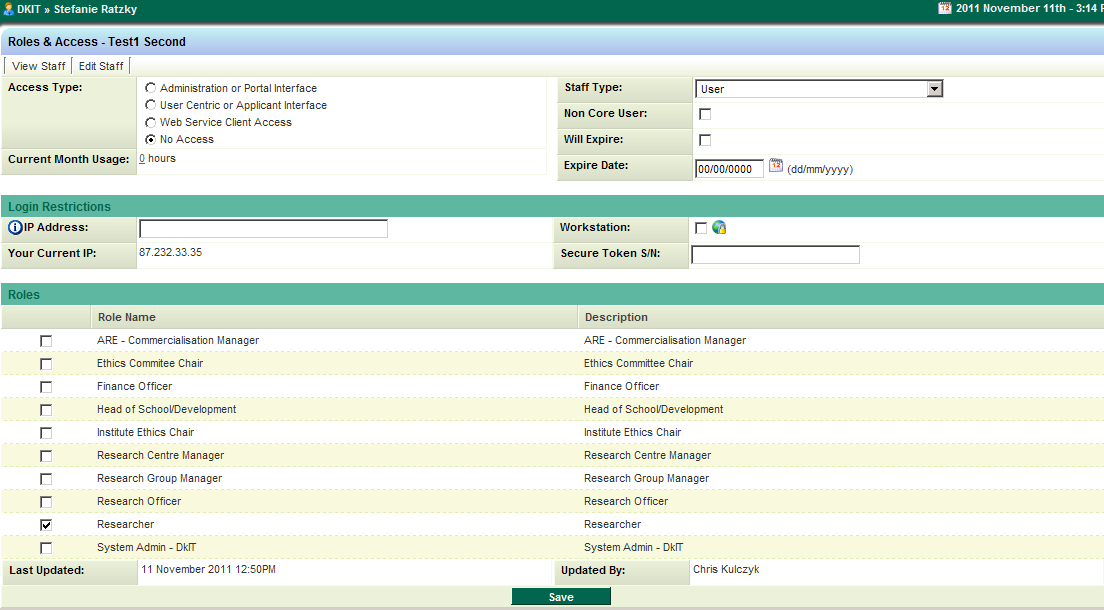


Now you can grant user a system access.

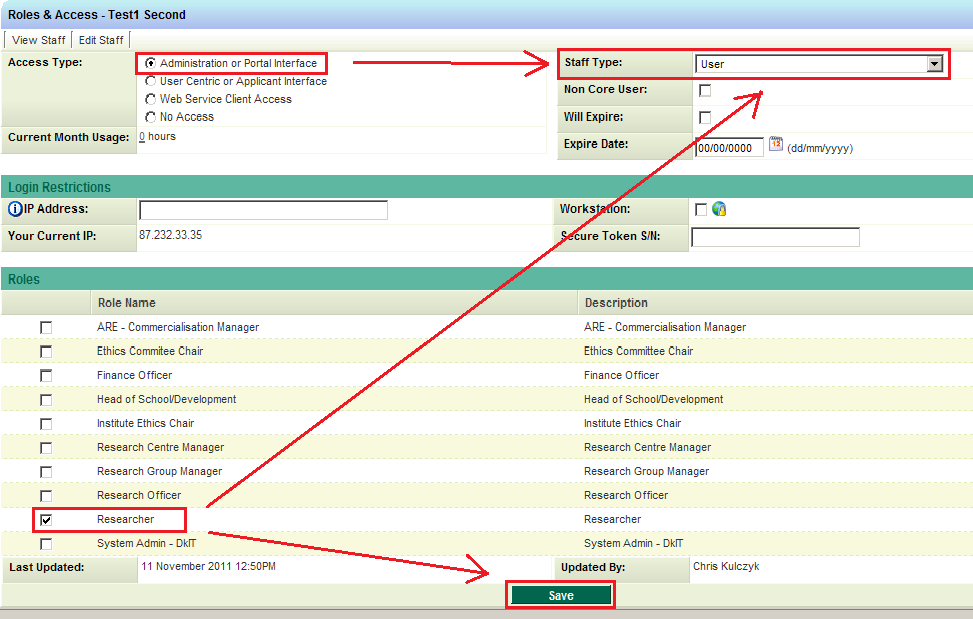
Select **Settings** then **Roles and Access** at the top of the screen.



You will be presented with the following screen:



Firstly you need to select the radio button on the top left and change it to **Administration or Portal Interface**, followed by changing the staff type to **User**. Finally make sure that selected role is correct (**Researcher**) and hit save:



Once this is completed new button will appear **Send Password** as user has access to the system now.

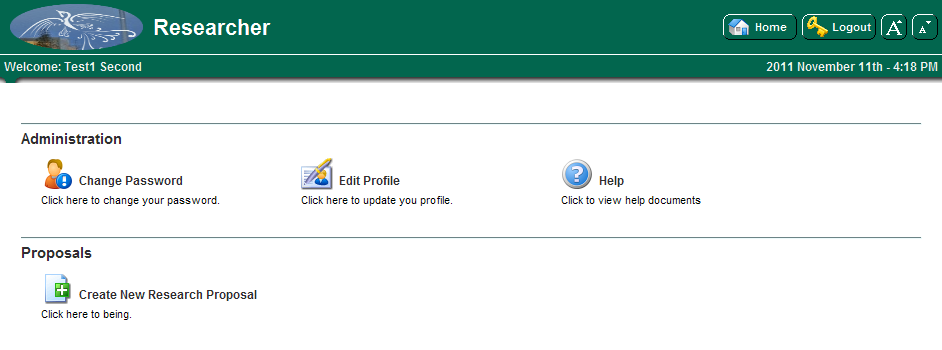
You need to send the user their password by hitting **Send Password**:



Automatic email will be sent automatically and Researcher now has access to the system.

# Researcher Portal (Role: Researcher)

When you login to a Researcher Portal for the first time you will be presented with the following screen.



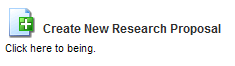
You will be able to:

**Administration**:

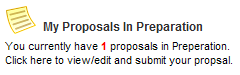
* Change your password.
* My Research Profile.
* Help Documents (PDF format).

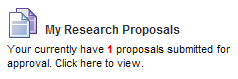
**Proposals**:

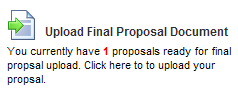
* Create new research proposal.



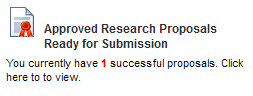
Once you create new application it will progresses through the system and you will be able to see different icons like:

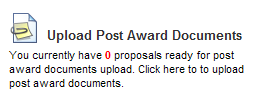








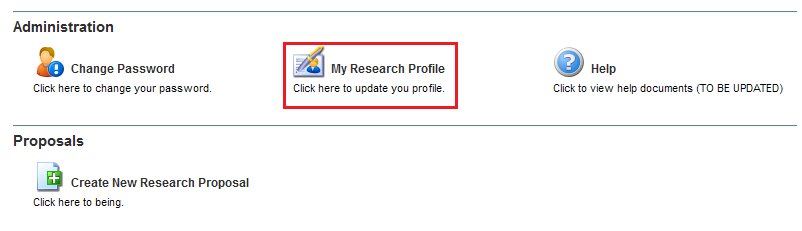




You will be notified by email every time you are required to login and update your proposal in the system.

## Edit your profile

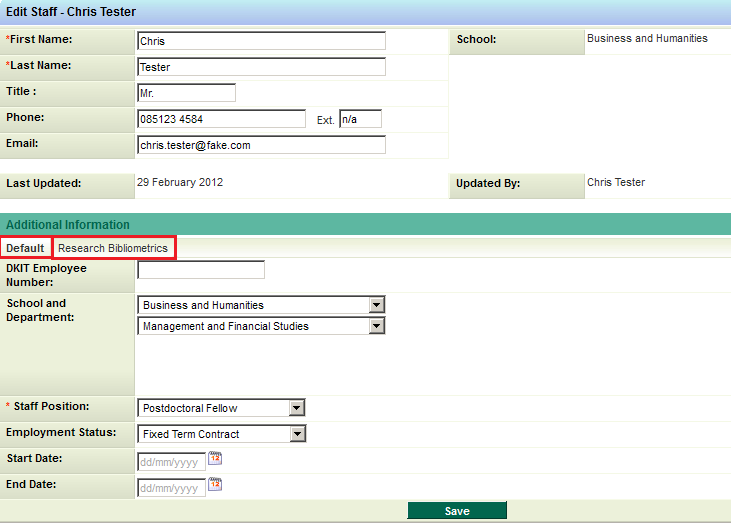
When you login to the system you will be presented with the following screen.



Click on **My Research Profile**. Now you will be able to update your profile. There are two tabs in **Additional Information** section:

* Default,
* Research Bibliometrics.

It is important to have this information up to date as some data is used when you create new proposal.



Once you upload **Default** section click **Save**.

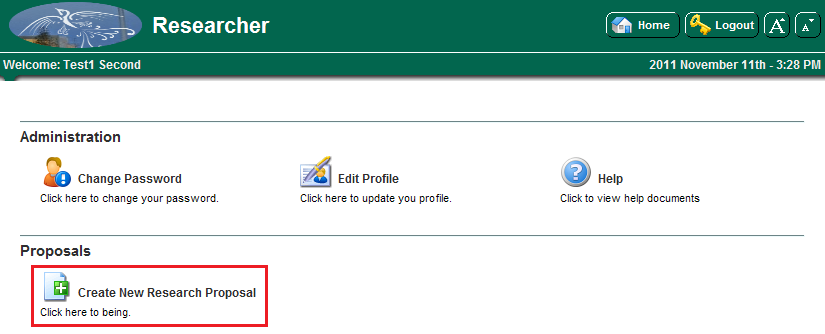
**Research Bibliometrics** tab hold all you bibliometrics entries and it is important to keep it up to date.



Remember once you **Add New** or **Edit** entry you would have to press **Save** to see any updates on screen.

## Create and submit a new research proposal

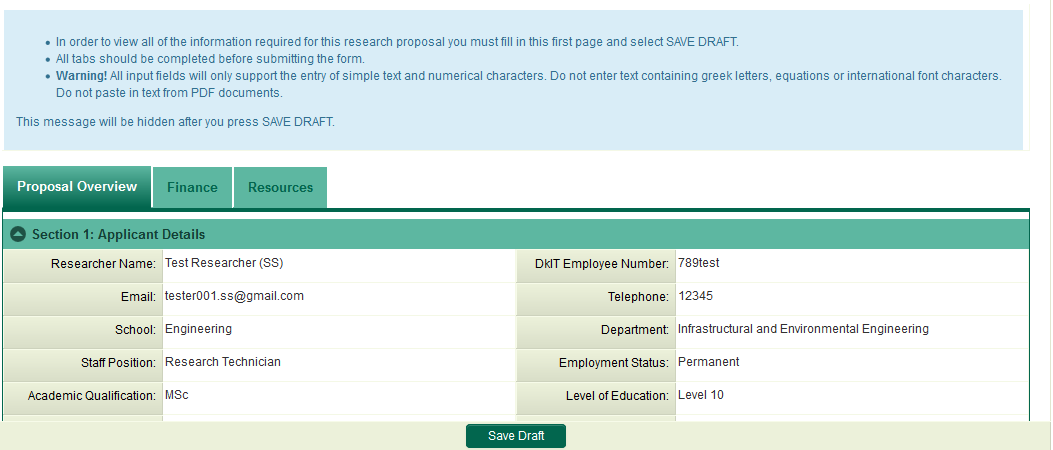
You can now log in as a Researcher and be presented with the following portal.



As a researcher click on **Create New Research Proposal** and you will be presented with the following screen:

## Proposal Overview Tab

Please ensure before you enter any information hit **Save Draft** to begin. This will make all the mandatory fields visible on the screen.

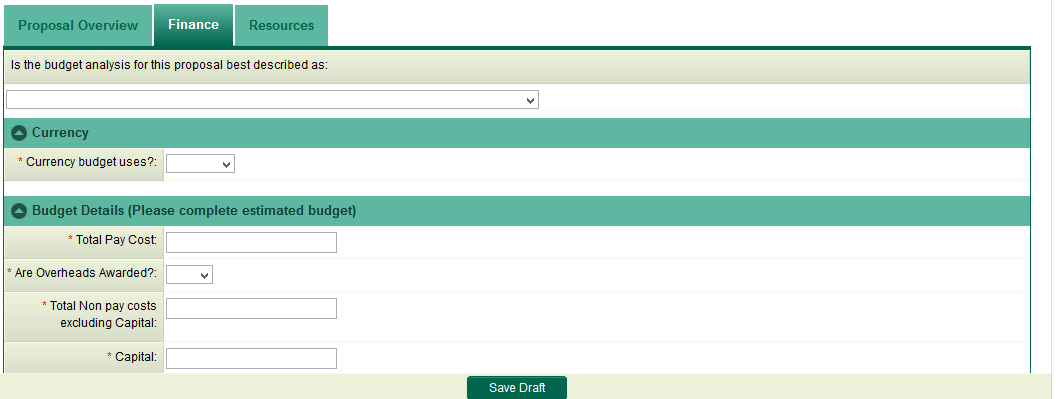


All tabs have to be completed: **Proposal Overview**, **Finance** and **Resources**, before you can submit the application.



## Finance Tab

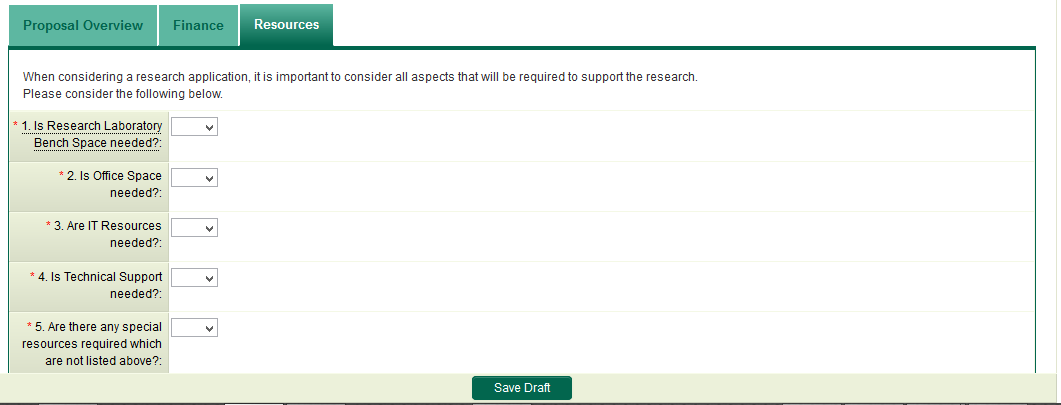
Click on **Finance** tab.



It is always a good practice to use **Save Draft** button to save all the entered information.

## Resources Tab

Click on **Resources** tab.



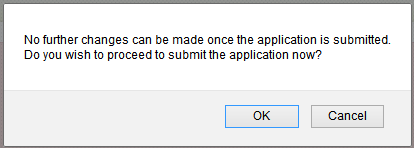
It is always a good practice to use **Save Draft** button to save all the entered information.

## Submitting a completed proposal

Once you completed of mandatory questions indicated with a red asterisk please **Save Draft** to save all the information to the system.

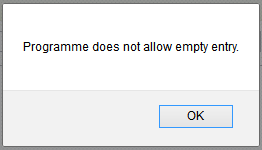
Now you can submit your proposal by clicking on **Submit for Approvals** button at the bottom of the screen.





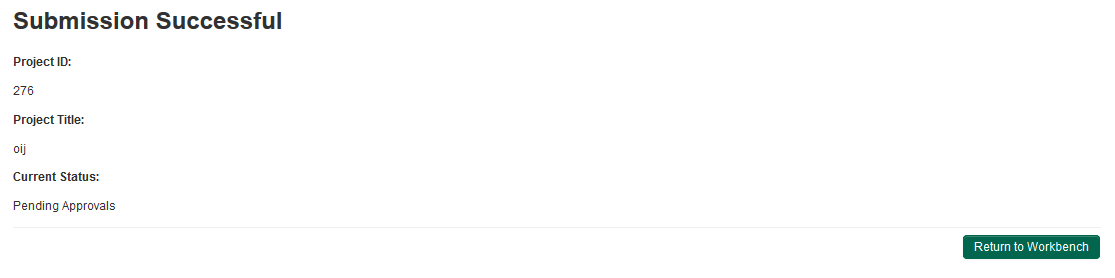
Once there was no missing information or errors your proposal will be submitted for approvals.

If there was any missing information you will be presented with an error message and ask to update any field that is missing.





After your submission was successful you will be presented with a thank you screen and from there you can return to your workbench.



## Research Proposals Requiring Revision

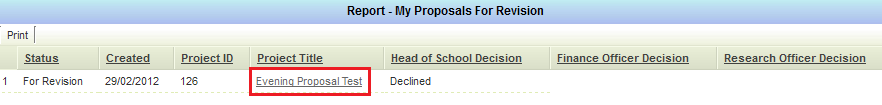
If any of the approvers declines your proposal you will be notified about this by email.

You will need to log in to the system and by clicking on the below button you will see a list of declined projects.

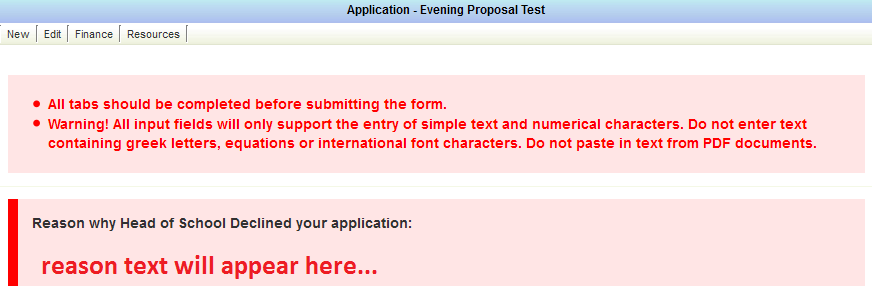
Now you can submit a revision.



Click on the project title link.



Now you can see in a reason box why approver declined your application.

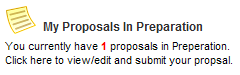


Now you can click **Edit** button and make necessary amendments and resubmit your proposal by clicking **Submit**.

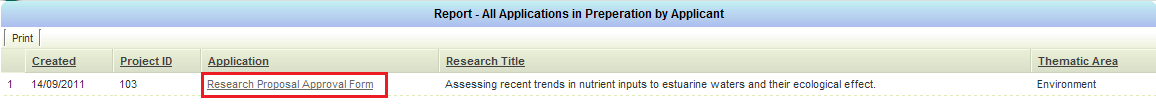
Email will be sent automatically to approver so they can review your submission.

## My Proposals in Preparation

If you have proposals which were not submitted yet they will be listed under **My Proposals in Preparation** icon, otherwise this icon will not be visible on your portal.

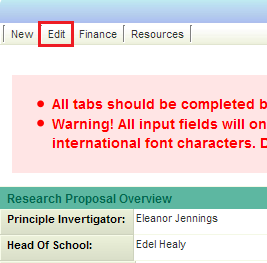


Once you click on the icon you will be presented with the following screen:



In order to continue with editing and submitting your application please click on **Application** type link.

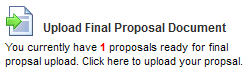
Now click **Edit**.



Once you complete the form you can **Submit** application for review or **Save Draft** and complete it another time.

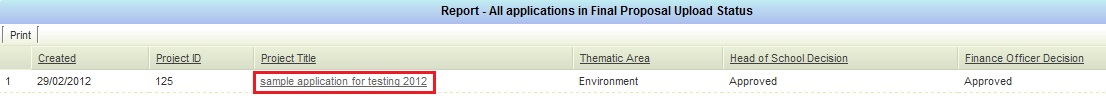
## Final Proposal Upload

When your proposal gets approved by Head of School and Finance Officer you will be notified by email that you can upload final proposal document. In order to do it please click on **Upload Final Proposal Document** icon.

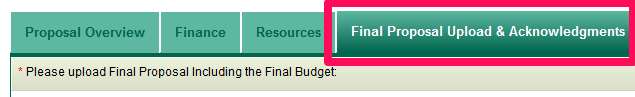


Select proposal on which you would like to upload proposal documents.

Click on the project title link.



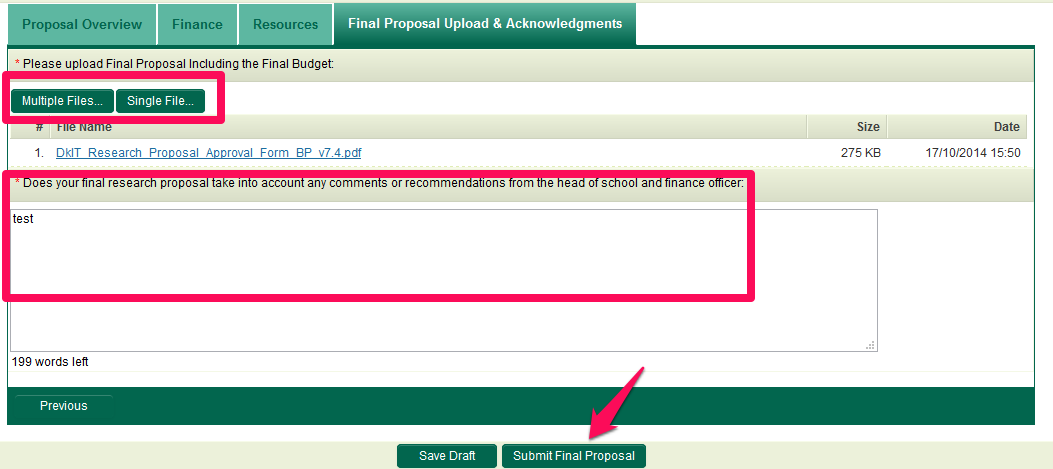
Click **Edit** button and then go to **Final Proposal Uploads** tab.



Now you can upload necessary documents in PDF format.

You need also provide comments in the text box.

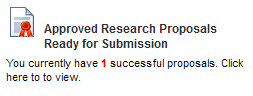
Once this is done please press **Submit Final Proposal** button. Research Office will be notified so they can review your application.



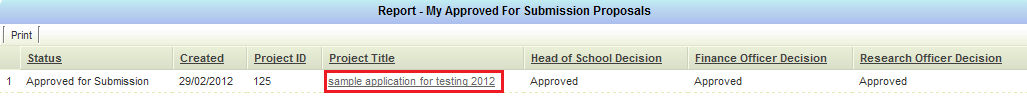
## Proposals ready for submission

Once all parties approve your proposal you will be notified to submit you proposal to the research funding body.

You can see following icon on your portal.



Click on the icon above.

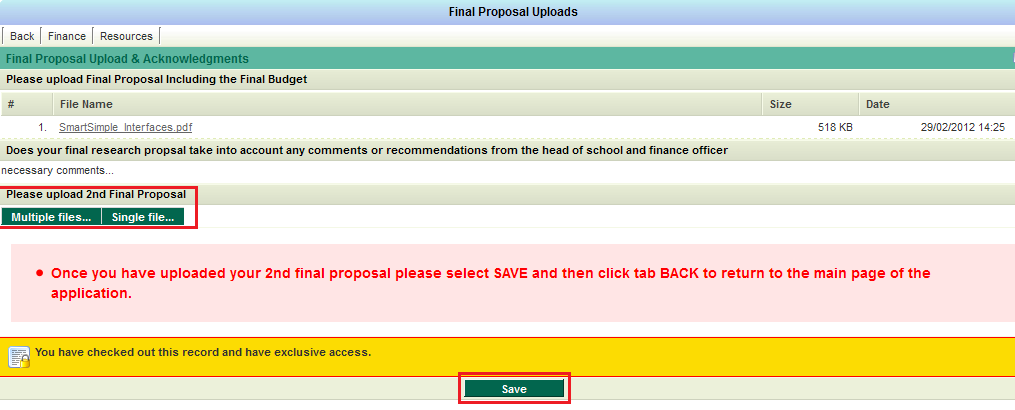


Now click on the proposal title link.

Now click **Edit** and then **Final Proposal Uploads** tab.



Now you can upload 2nd proposal using **Single/Multiple** upload buttons. Once this is done click on **Save** button.



Email will be automatically sent to Research Officer to review your uploaded proposal.

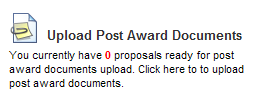
Now click on **Home** to go back to your portal view.

## Uploading Post Award Documents

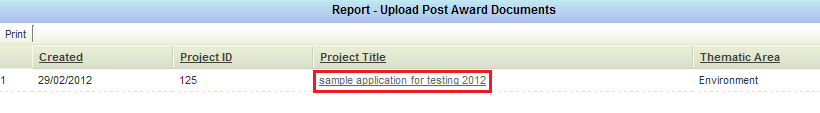
You will be notified by email when your proposal gets awarded.

You can also login to your portal and upload necessary Post Award Documents.

When you login to **My Portal** you should see icon **Awarded Research Proposals - Post Award Upload**.



When you click on it you will be presented with a list of your awarded proposals.



Select proposal you want to upload your documents to and click on the project title link.

Click **Edit** and then on **Post Award Documents** tab.



Now you can upload all documents in relevant categories.



Once this is completed press **Save**.

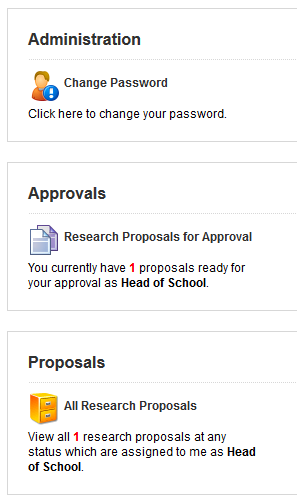
# Head of School Portal (Role: Head of School)

After researcher submits their proposal Head of School will get email notification with a request for approval.

**RULE:** For the **Enterprise Ireland Innovation Vouchers** and the **INtertrade Ireland Fusion Vouchers** – the head of School does not need to be an approver.

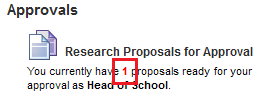
*"@FB Funder@ @FB Programme@" NOT IN ("InterTrade Ireland Fusion Vouchers","Enterprise Ireland Innovation Vouchers")*

When the Head of School logs in they are presented with the following screen:

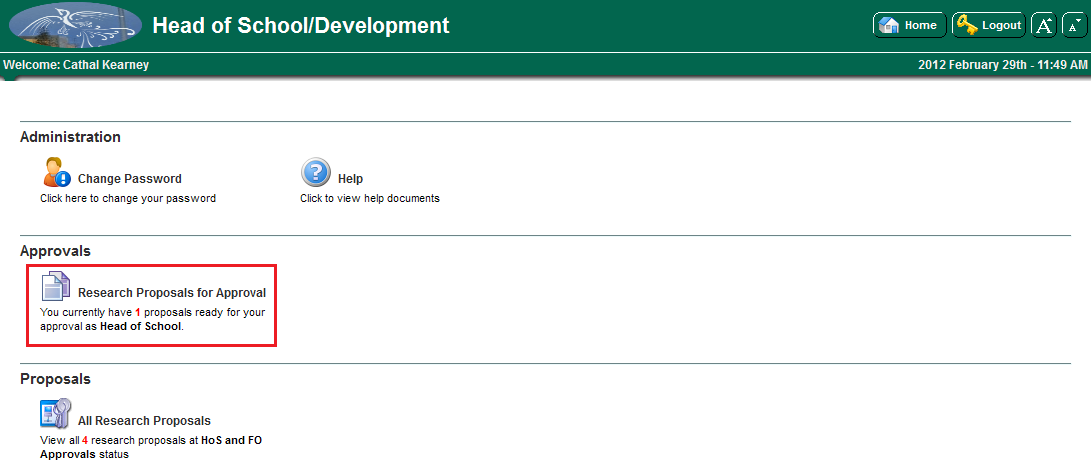


## Approving proposals

You can see how many proposals you have currently to review. This is marked in red on the Research Proposals for Approval icon description.

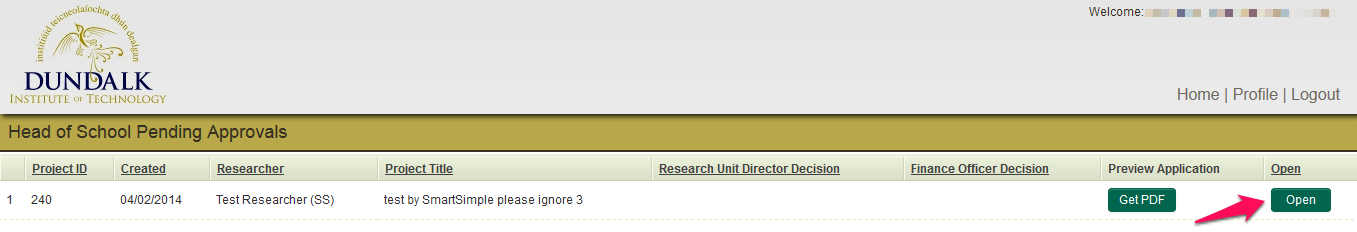


In order to start approval process click on **Research Proposals for Approval** button.



You will be presented with a report listing all projects ready for your review.

Click on a link to a proposal you want to review.

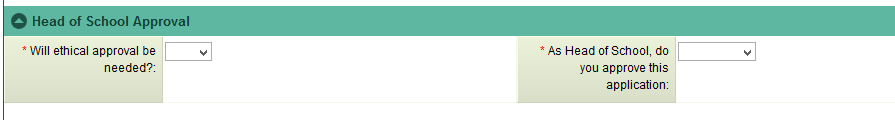


Now you can review the whole application to ensure it meets your requirements.

Please review all tabs **Main**, **Finance**, **Resources**. You can do it using tab buttons on the top of the project screen.



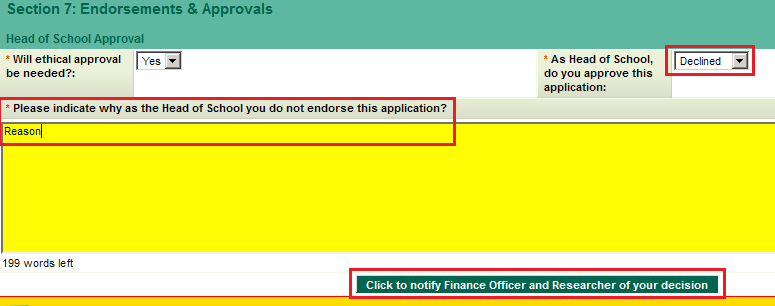
Once you have finished review process, scroll to the bottom of the main tab where you can **Approve** or **Decline** proposal.



When you **Approve** proposal system will check if other approvers also approved it (Research Unit Director (if assigned) and Finance Officer) and if so researcher will be notified by email and project status will be changed to **Final Proposal Upload**.

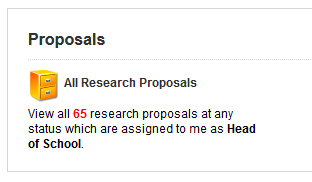


If you **Decline** the proposal you will be asket to indicate why as the Head of School you do not endorse this application. Once you send your decission Researcher will be notified to contact you and they will be able to login amend and re-submit their proposal.



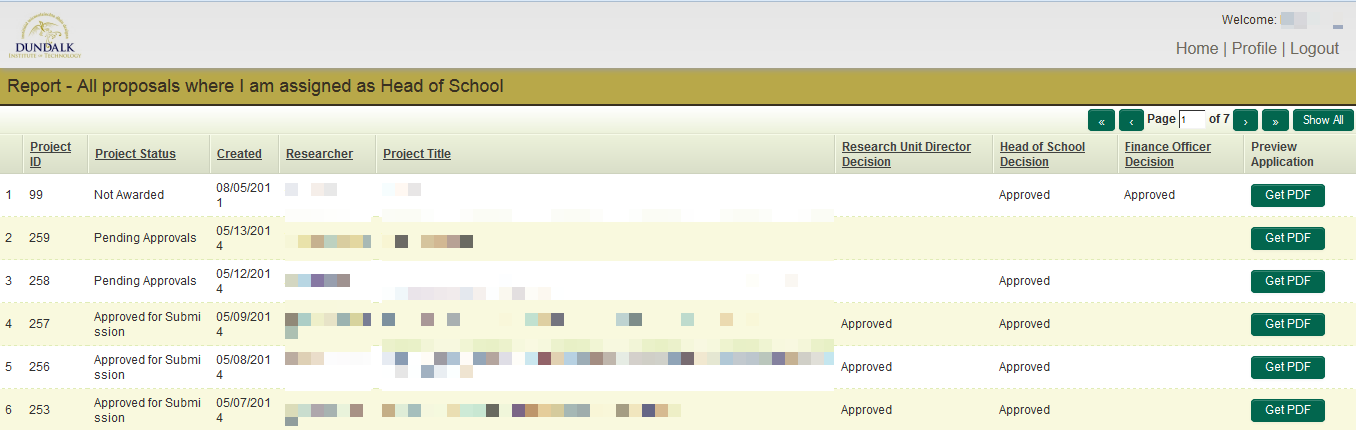
## Reviewed proposals

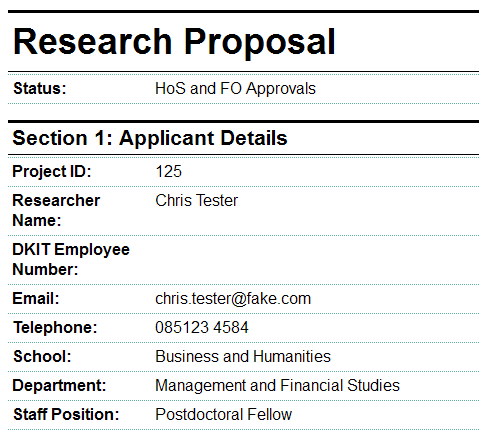
Once you review a proposal you will be able to find it in **All Research Proposals** report.



You can view here all proposals in your school.

You can preview proposal by clicking on **Get PDF** button.





You can save above application view as a PDF document.

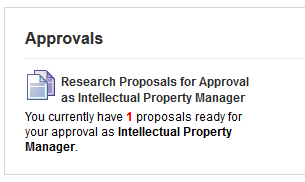
# Intellectual Property Manager Portal (Role: Intellectual Property Manager)

After researcher submits their proposal Head of School will get email notification with a request for approval.

**RULE:** Only for proposals which are not in **Enterprise Ireland Innovation Vouchers** and the **Intertrade Ireland Fusion Vouchers** – the Head of School does not need to be an approver.

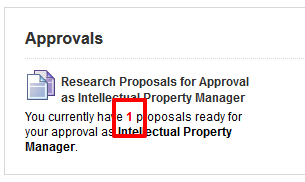
*"@FB Funder@ @FB Programme@" IN ("InterTrade Ireland Fusion Vouchers","Enterprise Ireland Innovation Vouchers")*

When the Intellectual Property Manager logs in they are presented with the following screen:



## Approving proposals

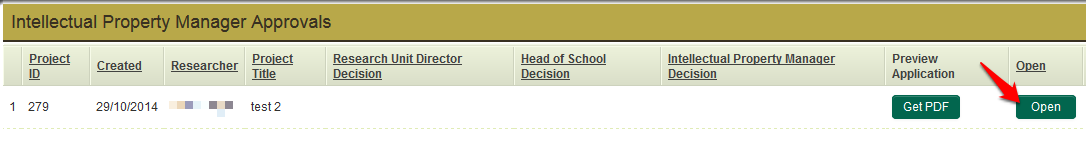
You can see how many proposals you have currently to review. This is marked in red on the Research Proposals for Approval icon description.



In order to start approval process click on **Research Proposals for Approval** button.

You will be presented with a report listing all projects ready for your review.

Click on a link to a proposal you want to review.

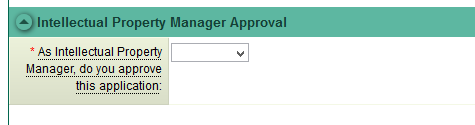


Now you can review the whole application to ensure it meets your requirements.

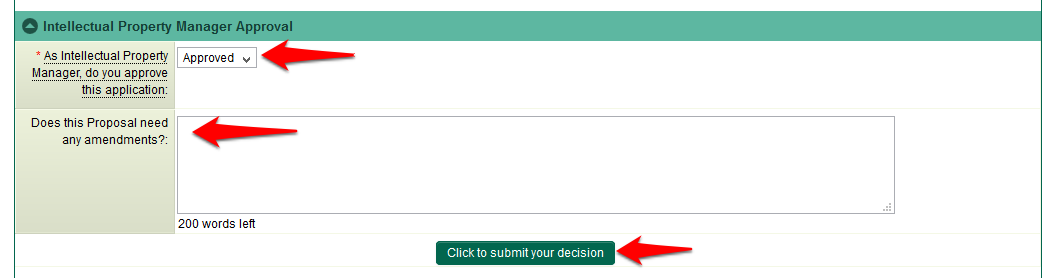
Please review all tabs **Proposal Overview**, **Finance**, **Resources**. You can do it using tab buttons on the top of the project screen.



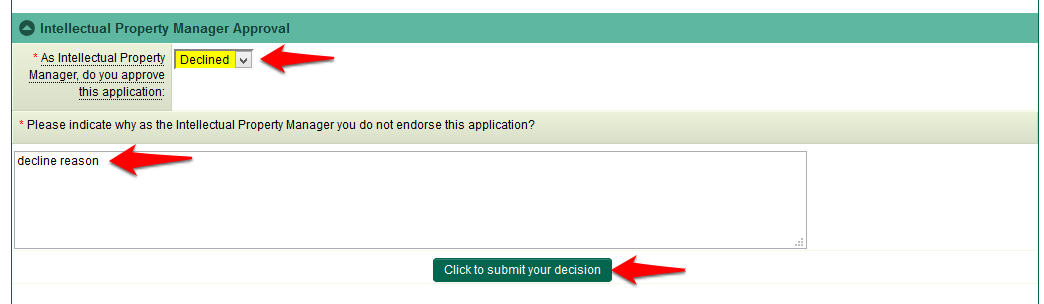
Once you have finished review process, scroll to the bottom of the main tab where you can **Approve** or **Decline** proposal.



When you **Approve** proposal system will check if other approvers also approved it and if so researcher will be notified by email and project status will be changed to **Final Proposal Upload**.



If you **Decline** the proposal you will be asket to indicate why as the Head of School you do not endorse this application. Once you send your decission Researcher will be notified to contact you and they will be able to login amend and re-submit their proposal.



# Research Unit Director (Role: Research Unit Director)

## Assigning Research Unit Director

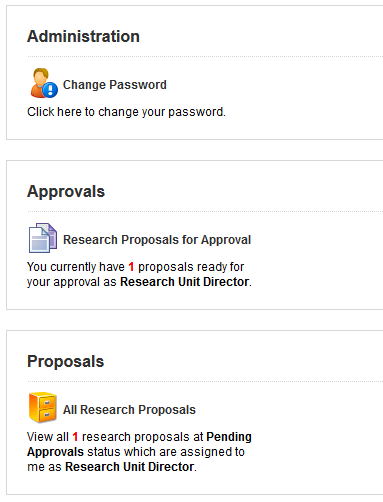
When researcher submits a new application to the status **For Approvals**, **Research Unit Director** will be assigned automatically depends on researcher’s **Sub Research Centre / Group / ARE**:

|  |  |  |
| --- | --- | --- |
| Research Centre / Group / ARE | Sub Research Centre / Group / ARE | Research Unit Director |
| Research Group | Creative Media Research Group | Bride Mallon |
| Electrochemistry Research Group | Tim McCormac |
| Research Centre | Centre for Freshwater and Environmental Studies | Eleanor Jennings |
| Centre for Renewable Energy | Paul MacArtain |
| Centre for Research in Music | Eibhlis Farrell |
| Humanities and Social Sciences | David Getty |
| Nestling Technology for Wellness Centre | Rodd Bond |
| Regulated Software Research Centre | Fergal McCaffery |
| Smooth Muscle Research Centre | Mark Hollywood |
| ARE | Centre for Affective Solutions for Ambient Living Awareness | Andrew Macfarlane |
| Ion Channel Biotechnology Centre | Mark Hollywood |
| Not Applicable | Not Applicable | no approval required |

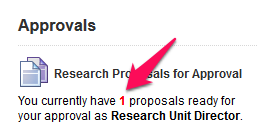
## Approving proposals (currently OPTIONAL)

After researcher submits their proposal Research Unit Director will get email notification with a request for approval.

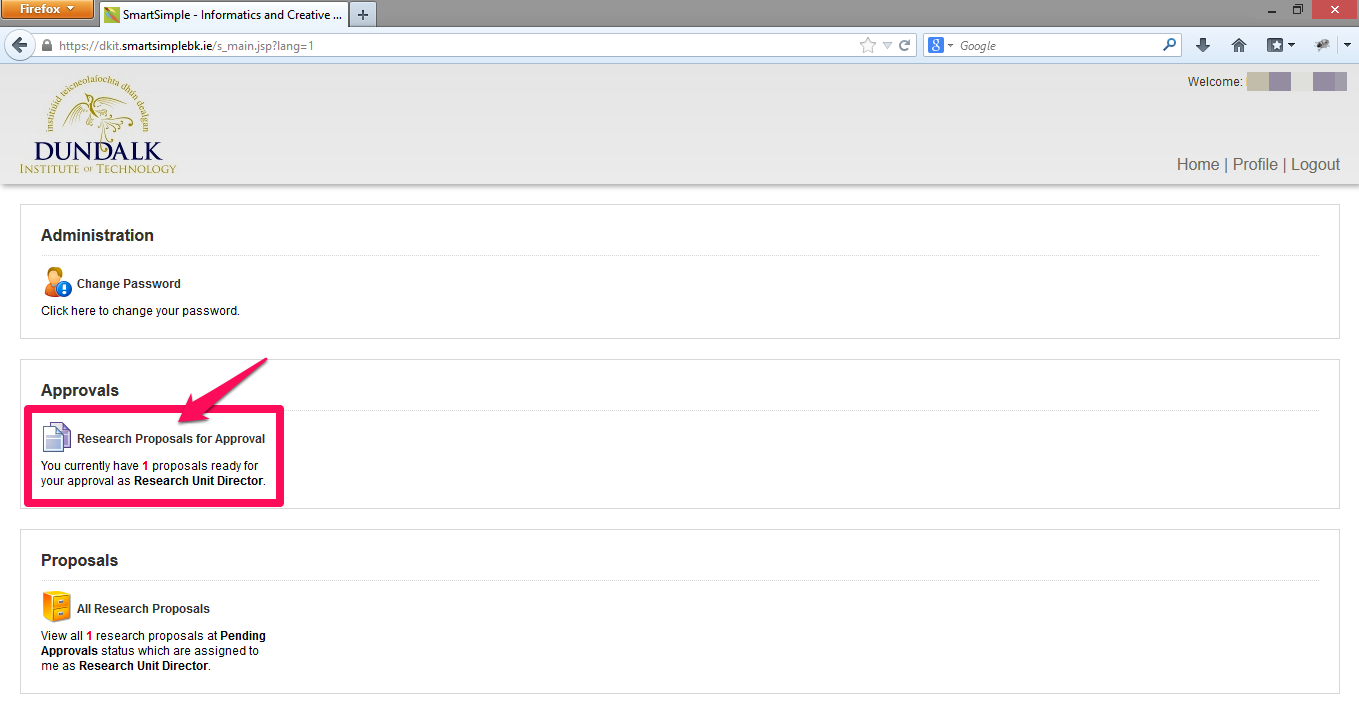
When the Research Unit Director logs in they are presented with the following screen:



You can see how many proposals you have currently to review. This is marked in red on the Research Proposals for Approval icon description.

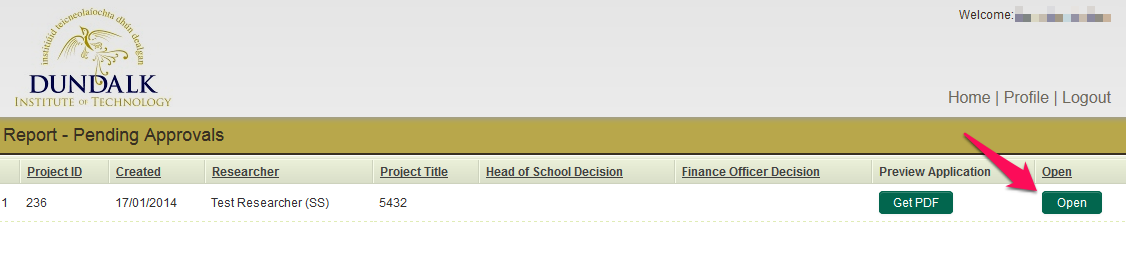


In order to start approval process click on **Research Proposals for Approval** button.



You will be presented with a report listing all projects ready for your review.

Click on the Open button next to a proposal you want to review.



Now click **Edit** button at the top of proposal if necessary.

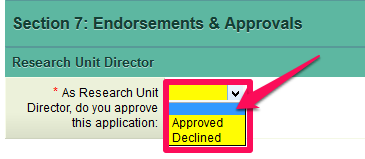


Now you can review the whole application to ensure it meets your requirements.

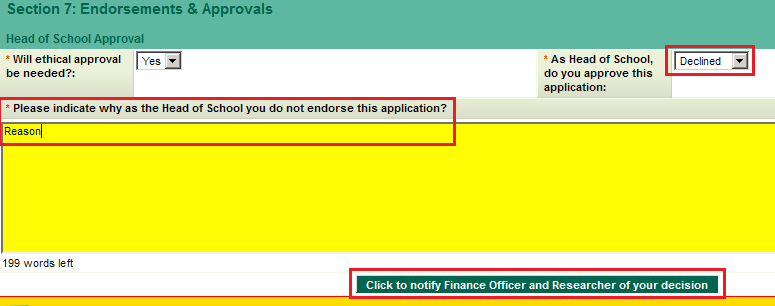
Please review all tabs **Main**, **Finance**, **Resources**. You can do it using tab buttons on the top of the project screen.



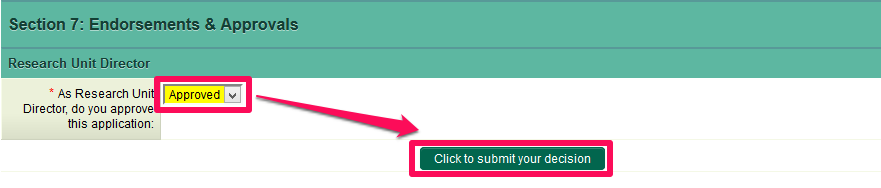
Once you have finished the review process, scroll to the bottom of the main tab where you can **Approve** or **Decline** proposal.



If you **Decline** proposal you will be asket to indicate why as the Head of School you do not endorse this application. Once you send your decission Researcher will be notified to contact you and they will be able to login amend and re-submit their proposal.



When you **Approve** proposal system will check if other approvers (Head of School and Finance Officer) also approved it and if so researcher will be notified by email and project status will be changed to **Final Proposal Upload**.



## Reviewed proposals

Once you review a proposal you will be able to find it in **All Research Proposals** report.



You can view here all proposals assigned to you.

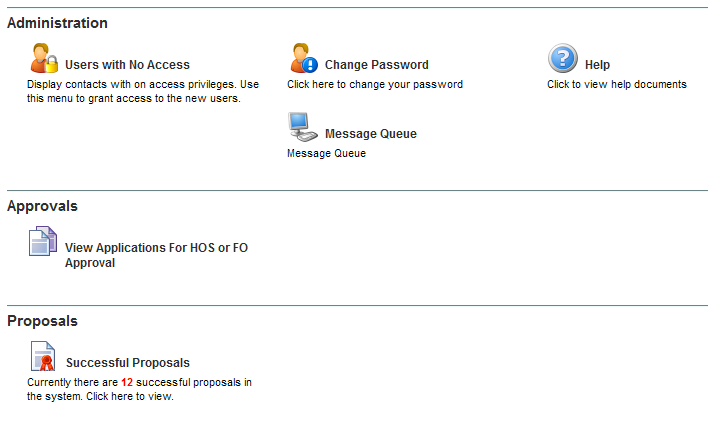
You can preview proposal by clicking on **Get PDF** button.



You can save previewed application as a PDF document.

# Finance Office Portal (Role: Finance Office)

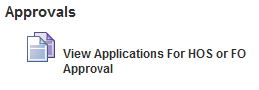
When Finance Officer logs in to the system they will be presented with the following screen:



## Approving proposals (NOT NEEDED ANYMORE)

You will be notified by email when Researcher submits a new proposal for approval.

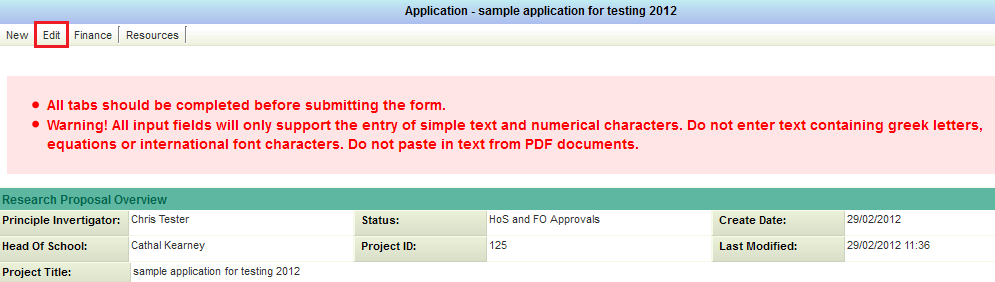
All proposals required Finance Office approval will be listed in **Approvals** section. See screen below:



Once you click on the above icon you will be presented with report listing all proposals available for Finance Office approval.



Now click **Edit** button at the top of proposal.

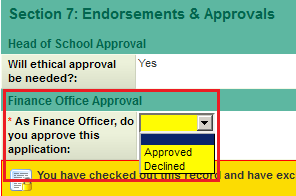


Now you can review the whole application to ensure it meets your requirements.

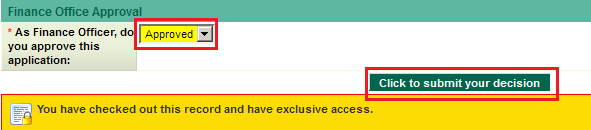
Please review all tabs **Main**, **Finance**, **Resources**. You can do it using tab buttons on the top of the project screen.



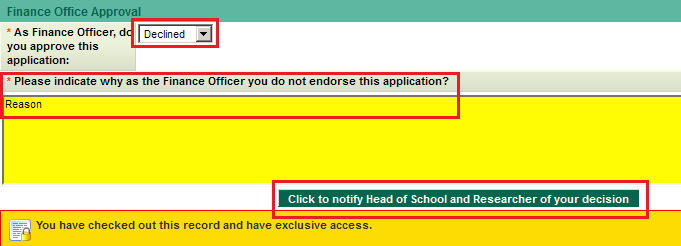
Once you have finished review process, scroll to the bottom of the main tab where you can **Approve** or **Decline** proposal.



When you **Approve** proposal system will check if other approvers (Research Unit Director (if assigned) and Finance Officer) also approved it and if so researcher will be notified by email and project status will be changed to **Final Proposal Upload**..

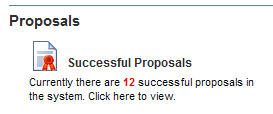


If you **Decline** the proposal you will be asket to indicate why as the Finance Officer you do not endorse this application. Once you send your decission Researcher will be notified to contact you and they will be able to login amend and re-submit their proposal.

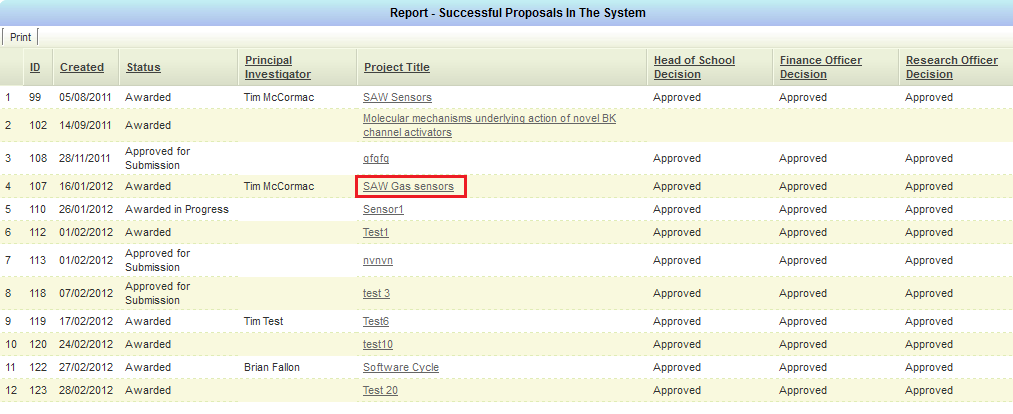


## Reviewed proposals

Once you review a proposal you will be able to find it in **All Research Proposals** report.



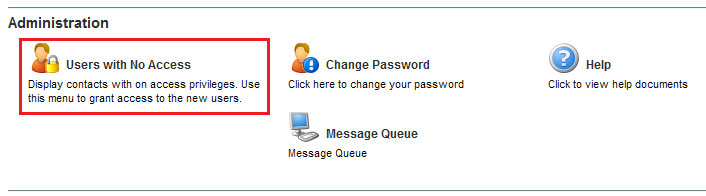
You can view here all proposals in the system.



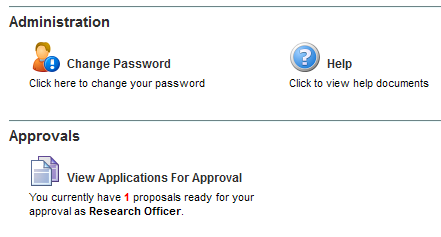
If you want to preview any of them just click on proposal title link.

## Activating a Researcher in the system

As a Finance Office you can grant access to newly registered researchers in the system. These steps are described in Chapter 2.



# Research Office Portal (Role: Research Office)



## Approving proposals

You will be notified by email when Researcher uploads final proposal.

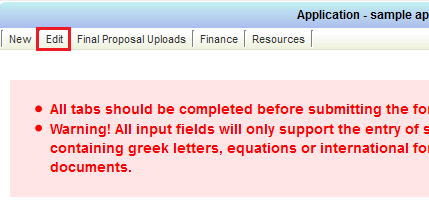
All proposals required Research Office approval will be listed in **Approvals** section. See screen below:



Once you click on the above icon you will be presented with report listing all proposals available for Research Office approval.



Now click **Edit** button at the top of proposal.

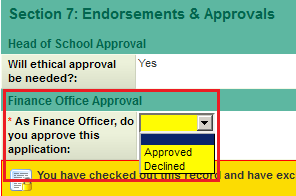


Now you can review the whole application to ensure it meets your requirements.

Please review all tabs **Main**, **Final Proposal Uploads**, **Finance**, **Resources**. You can do it using tab buttons on the top of the project screen.



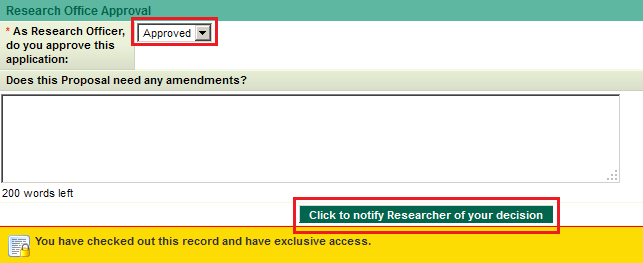
Once you have finished review process, scroll to the bottom of the main tab where you can **Approve** or **Decline** proposal.



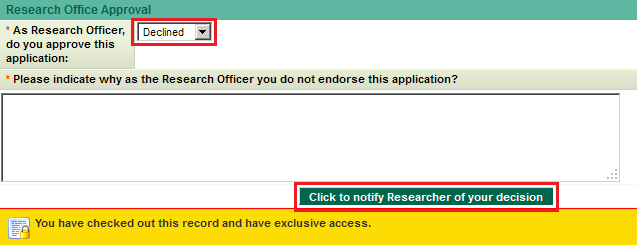
If you **Approve** proposal email will be sent to Researcher asking send proposals to the research office as per email below.

Your research application entitled "@Research Title@" has been approved by the Institute’s Research Office. Please submit your proposal to the research funding body and ensure that you have attained all

Please send the final copy of your submitted research proposal to the Research Office both electronically (researchoffice@dkit.ie) and by hard copy.



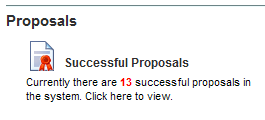
If you **Decline** the proposal you will be asket to indicate why as the Research Officer you do not endorse this application. Once you send your decission Researcher will be notified to contact you and they will be able to login amend and re-submit their proposal.



## Reviewing 2nd uploaded proposal

When researcher uploads 2nd proposal Research Office will be notified.

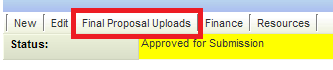
You can find this proposal in **Successful Proposals** icon so please click it.

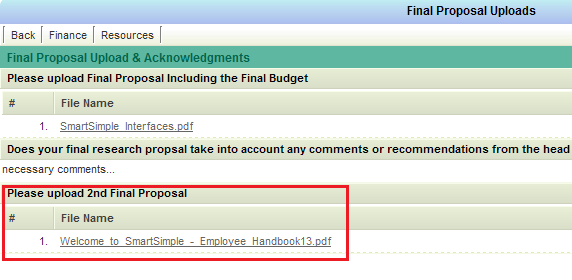


Now click on the project title which interests you.



Now click **Final Proposal Uploads** tab where you will be able to find **2nd Final Proposal** section with uploaded documents.

****

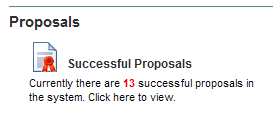
****

# Proposal at Award Status (Role: System Admin - DkIT)

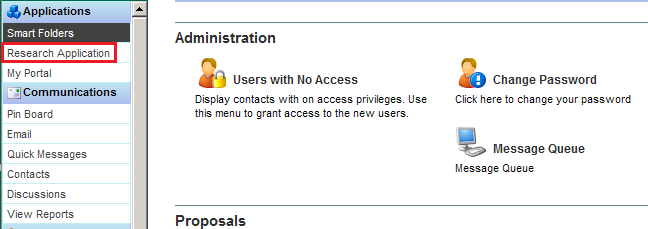
Once application reaches status of **Approved for Submission** this is when 2nd proposal document gets uploaded by researcher onto the application and all required approvals are granted. System Admin is required to change the status of the application to **Awarded**.

It can be done from two places :

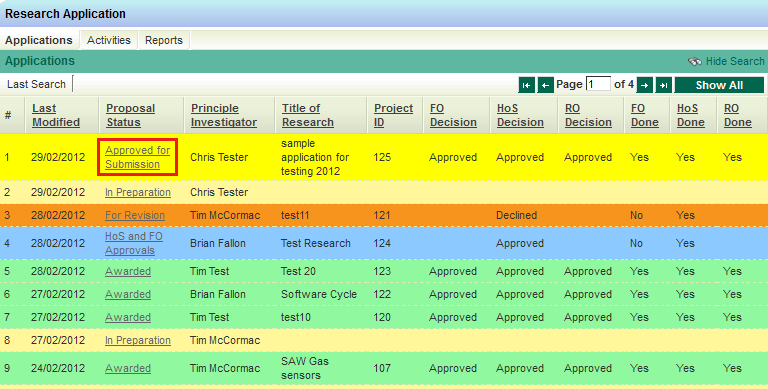
* **Successful Proposals** on **My Portal**



* **Research Application** in **Applications** menu on the left hand side of the screen.

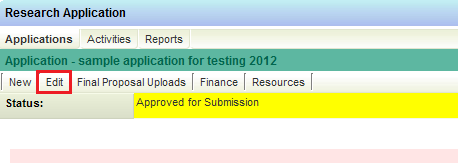


I’ll use here **Research Application** link as it gives you better overview of all proposals in the system.

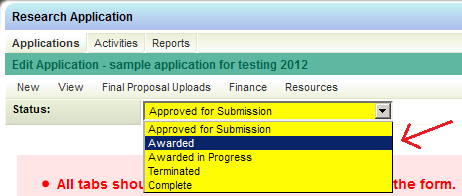


Once you find application in **Approved for Submission** status you click on its proposal status link. As per above screenshot.

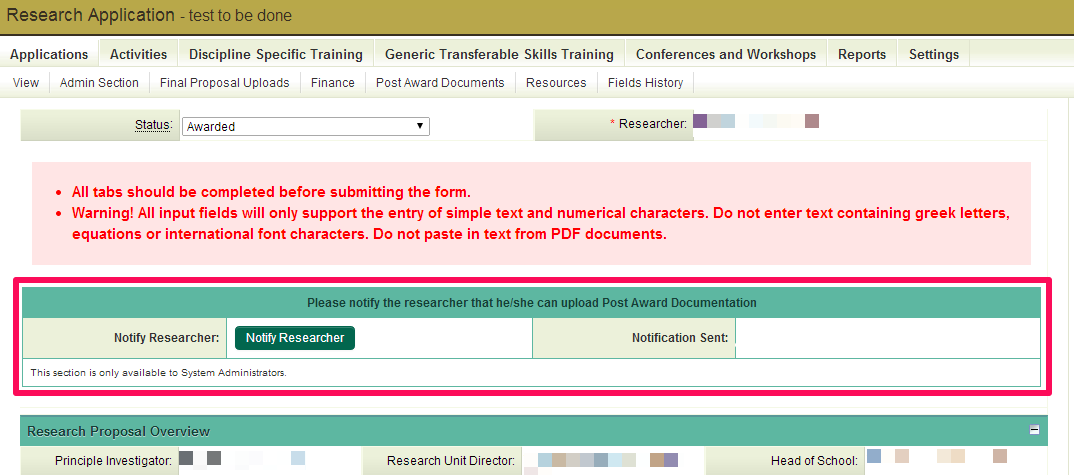
Now click **Edit** .



Change the status of selected application to **Awarded**.



Press **Save Draft** at the bottom of the screen. Now you should be able to see a new button **Notify Researcher** on the screen.



When you click it Researcher will get an email:

During the course of your research project you must log onto the RMS system and upload all relevant documentation. This should include, but is not limited to:

• Letters of Offer

• Research Agreements and Contracts

• Intellectual Property Documentation Sets

• Technical and financial project reports

• Consortium agreements

• Memorandum of Understanding

• Research Agreements

• Collaborative Agreements

• Resulting Publications

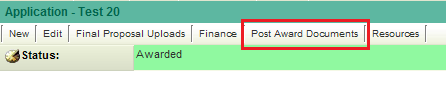
• Resulting Postgraduate Thesis

• Patents

• Licensing Agreements

• Resulting Presentations

You can view these documents on a **Post Award Documents** tab.





# System Workflow

Please refer to a separate document call DkIT Research Proposal Approval Form BP to view current business process workflow.