Maynooth University
Research Development Office
Research Information
System

Research Information System
Genius and Proposal Tracking modules – User Guide for Departmental Administrators

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Date: Sept 2014

CONTENTS

Welcome to the Maynooth University Research Information System (RIS)

 The Maynooth University Research Information System (RIS) comprises several areas of functionality to support academic researchers with their funded research activity needs.

As a Departmental Administrator, there will already be a departmental profile created for you within the portal under the name of the department. This profile contains the contact details for the department and other categories of information and enables you to have administration rights for your department. You will be able to access the profiles of all the academic staff within the department, which hold information about their research expertise and academic interests. The profile categories, which are designed to mirror the requirements of the annual President's report, have been pre-populated with information from staff web pages to provide a foundation on which additional data can be added. In addition, you and all staff members from your designated department, who have submitted a proposal through the Research Development Office since 1st January 2009 will be able to track and access those proposals and any documentation related to the submitted proposals. By keeping a well maintained research profile, academic staff will benefit from various services designed to help them raise their profile to both internal and external audiences. The research profiles will also become valuable in various administrative processes at Maynooth University such as, research planning, contribution to the Annual President's Report and staff development.

A searchable Maynooth University Expertise portal, the Researcher Profile Directory (RPD) is hosted on the Maynooth University Research website (http://research.maynoothuniversity.ie/). The profiles of all Maynooth University academic staff will be displayed and searchable to the outside world through this directory so this is their chance to showcase their research and interests. Throughout this user guide, there are certain categories in **red type**. The red type depicts the categories that are exported and displayed on the RPD. **These categories need to be populated and up-to-date**.

The RIS also enables you and academic staff from your designated department, to track research applications and awards plus other research related activities. This helps them to query the progress of their research applications through to the funder decision.

For further information about the **Maynooth University Research Information System** please visit:

https://www.maynoothuniversity.ie/research/research-development-office/ris-guide

Entering the Maynooth University Research Information System

To access the system navigate to the Maynooth University Research Information System at the website address: http://infoed.maynoothuniversity.ie

Alternatively, click on the Maynooth University Research Information System link on the Research home page: http://research.maynoothuniversity.ie/research/

To enter the Maynooth University Research Information System you need to login to the system. Select **Login** and enter your username and password when prompted.

→ *See Screenshot (S) 1 in Appendix 1 for assistance*
Screenshots available will be marked with '→ See S…' throughout the guide

If you have not received an e-mail containing your username and password or are unable to log into the system, please contact the Research Development Office:

research.development@maynoothuniversity.ie

Once you have entered the system you will see *S.2.*

Please note: that for a Departmental Administrator profiles are managed from the Old Portal whereas proposal records are tracked/managed in the New Portal. Academic staff users will have access to their profiles only via the New Portal. When you log in to RIS you will be taken automatically to the Old Portal. Should you wish to access proposal data, you should select 'New Portal' from the menu on the top left hand side.

Accessing and editing the departmental RIS profile

1. How to access and update Departmental contact information

i. Select '**Profile**' from the menu on the left hand side which opens up the profile for editing.

ii. To view the contact information for editing, select the '**Change**' icon

iii. Make the necessary changes, for example, change e-mail address, then select '**Save**'

2. How to change a password

i. Follow the steps in section '1. How to access a profile'

ii. Once in the general section scroll down to the bottom left hand side of the page to the **Security** section in order to update the password

iii. Select **Set** as shown below:

iv. Add **Maynooth University password** when prompted.

v. Select **Submit**.

vi. Then select **Close**. Unfortunately, there is no pop-up window to tell you have successfully changed your password. The only way to check is to log out and log in again with your new password.

> **Please note**: After updating the password, all future log in attempts will require the username and new password.

Accessing and editing a staff member RIS profile

Select the **Administration** tab on the left-hand side and this will take you to *S.3.* Click on the **Investigator Administration** link in the **Personnel Administration** menu. This will bring you to *S.4.*

1. How to access a staff member RIS profile

You can select a profile to view/edit by:

    i. *Click on **ALL** at the top left-hand side and then the **down-arrow** on the right-hand side which will give an alphabetical list of all academic members of the department. Scroll down the list and click on the desired profile and then click on the **Select** button to view the profile.*

    ii. *An academic can be selected by choosing their name from the alphabetical list. Click on the first letter of the surname and then pick the appropriate name from the drop-down menu and **Select**.*

    iii. *You may also enter a name in the **Search for a particular entry** field and then click on **Select**.*

The academic's general profile screen will be displayed (→ *See S.5* and below). On the left-hand side there is a column of links to sections that make-up a user's profile. These links will always be displayed regardless of where you are in the system.

> **Please note:** If a profile has been previously visited you may not see the screen illustrated below. Instead you may be presented with a screen displaying the fields holding the general information. To return to the below illustrated screen, simply click on the **Check-In** icon towards bottom of page.
>
>
> Check In

To access the area which holds general information such as name, degree qualification, department etc, click on the **Change** link shown in the box.

→ *See S6*

Viewing an academic's profile in 'Personnel Administrator mode' means that you have the option to make changes here.
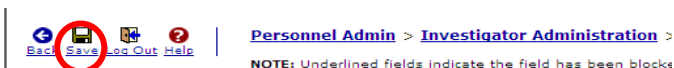
2. How to edit the staff member contact details and research interests

From here you can add/amend personal information. The **General** section includes fields containing name, address, contact details and research interests.

    i. *Follow the guidelines in section '1. How to access a profile'*
    ii. *Check that **contact details** are correct and enter the relevant text into empty fields*

→ *See S.6*

    iii. *Whenever you add or edit information into a profile, save your changes by clicking on the **Save** icon situated upper left of the screen and shown below.*

Personnel Admin > **Investigator Administration** >
NOTE: Underlined fields indicate the field has been blocke

Please note: Throughout the profile system you will find fields marked with a red asterisk, these are mandatory fields. You will not be able to save any changes in a section until the mandatory fields contain data. If you do not have any information for a mandatory field you should enter TBA (to be added) in the field to allow you to save any changes you have made within a section.

→ *See S.7*

    iv. ***Inputting the Research Interests Summary**: This is one of the key areas of interest to someone viewing an academic's profile. This section is used for inputting information about the research an academic is currently working on or to identify future areas of interest. Also, affiliation to a Research Institute can be selected.*
    v. ***Other Profile Data and Primary Address**: Within the **General** section there are also **Other Profile Data** and **Primary Address** sub-sections.*

→ *See S.8*

    vi. ***Editing the Primary Address**: The address can be assigned as being either a work or home address by selecting the appropriate address type from the **Address Type** drop-down menu. Multiple addresses can be added using the **Add Additional Address** facility and denoting what address should be displayed as the active address by ticking the **Primary Address** tick button.*
    vii. ***Including a Web Page**: The **Web Page** field can be used for a web page link (which may be a link to any research-related web page). Enter the appropriate URL into the **Web Page** field. Please omit **http://** when entering the URL details.*
    viii. ***Setting the Status**: This field should be populated, via the drop-down menu selection, with **Active** for an academic currently employed at the University.*
    ix. ***Setting the Academic Rank**: Select the academic rank from the drop-down pick list. If there is not an option that best describes the academic rank, then please contact the Research Development Office to inform them of the preferred choice.*
    x. ***Setting a Private Profile**: This option allows you to choose whether a profile's information is made public via external searches and web pages which source information from the RIS. If 'Yes' is selected the contact information, research interests and five most recent publications will be displayed on the Maynooth University Researcher Profile Directory.*

Private Profile: Yes ○   No ●

Please note: the default setting for Private Profile is **No**, therefore **Yes** needs to be ticked if profile is to be made private.

xi. *Printing Profile Information: The **Full Profile** option allows you to view and print all the data in a profile. To view a profile's data click on the **Full Profile** button (→ See S.5: upper right of screen). A pop-up window will open displaying the profile information. You may choose to view the data and close the window or you may wish to print the profile information by simply clicking on the **Print Profile** button. Close the window by clicking on the **Close Profile** button.*

When you have finished adding/amending data to the **General** section ensure to save your changes. To complete editing of the General section, click on the **Check-In** icon, this will also prompt you to save any changes.

→ *See S. 9*

If, at this point, you decide to leave the **Profile** section please ensure you save any changes before clicking the **Log Out** button (top left hand corner of the screen).

Alternatively, you may want to enter other categories to add/edit data. To navigate to another category, click on the appropriate link from the list on the left-hand side.

3. How to add publication information

Adjacent to the box containing contact information, there is a list of categories to which data can be added. The categories relate directly to Annual President's Report and include Publications (7 types: Journals, Chapters, Books, Reviews, Non-peer-reviewed, Other, Thesis) Custom category (4 types: Conferences hosted, Public body assignments, Public presentation, Visiting & Guest lectures) and Sponsored Funding.

Please note: when entering publication data please ensure that the link (URL) to the publisher's full text of the article is added to the Link/Hyperlink field. Inclusion of the URL to the publisher's full text facilitates addition of the article to the ePrints open access repository.

→ *See S.10.* The rest of the list of categories is revealed by clicking on the down arrow.

i. *To add publications, follow the guidelines in section '1. How to access a profile'*
ii. *From the menu on the left hand side, click on the down arrow for '**More…**' categories*
iii. *Consult with the staff member whose profile you are updating regarding the publication category to which the publication data should be added or refer to the '**Guidelines for categorisation of publications in the Research Information System**' which can be downloaded from https://www.maynoothuniversity.ie/sites/default/files/assets/document/Guidelines%20for%20publ%20categorisation_Mar2011_0.pdf*
iv. *Select the appropriate Publications category, for example, **Publications-Journals***
v. *To add the details of a peer reviewed journal select the '**Add New'** button.*

→ *See S.11*

vi. *Add the relevant publication data to the required fields.*

→ *See S.12*

Please note: Ignore the Research Outputs Upload icon as Maynooth University does not run the Research Outputs module.

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vii. ***Authors:*** *This field, along with the **Co-Authors** field enables you to give the authors names in the order most appropriate. By default, the academic's own name is shown in the author's field. This may not always be applicable and so is editable for you to make the relevant amendment.*

viii. ***Journal:*** *Select a journal from the drop-down menu and its ISSN number will automatically populate the ISSN field. If the journal you wish to select is not shown in the list, please contact the Research Development Office.*

ix. ***Link:*** *If it exists add the URL to the publisher's full text of the article. If this field contains a link, this will be automatically collected by the Maynooth University E-prints repository. A URL entered into this field will display as an active hyperlink.*

x. ***Additional information:*** *E-prints ID code: if the publication was deposited into the Maynooth University E-prints repository, it will have a unique E-prints ID code. Add the E-prints ID code to this field to ensure that a link to the full text is included in the external profile (Researcher Profile Directory). Significant publication – check this box if the publication is significant.*

xi. *Select **Save and Return** to save the journal details and re-load the page.*

4. How to edit existing publication information

i. *To edit existing publications, follow the guidelines in '1. How to access a profile'*
ii. *Click on the down arrow for 'More...' categories*
iii. *Select the appropriate Publications category, eg. **Publications-Journals***
iv. *Navigate to the relevant listed publication and click on the **Edit** icon. You will then enter the editable data screen for that publication.*
v. *Select **Save and Return** to save the journal details and re-load the page.*

→ *See S.13*

5. How to delete publication information

i. *To delete existing publications, follow the guidelines in section '1. How to access a profile'*
ii. *Click on the down arrow for 'More...' categories*
iii. *Select the appropriate Publications category, eg. **Publications-Journals***
iv. *Navigate to the relevant listed publication and select the tick box of the appropriate entry, then click on the **Delete** button.*
v. *Select **Save and Return** to re-load the page.*

The same data entry and editing process is followed for the other publication sections (**Chapters, Books**, **Reviews, Non-Peer, Other,** **Thesis**).

6. How to add/edit Sponsored Funding information

The **Sponsored Funding** table is used to hold information about an academic's research projects. This can be edited in the same way as the Publications tables.

Please note: For successful proposals submitted through the Research Development Office since 1st January 2009, the information held in **Sponsored Funding** will be updated automatically by the Research Development Office upon receipt of notification that the proposal has been successful.

     i. *To add/edit the Sponsored Funding table, follow the guidelines in '1. How to access a profile'*
    ii. *Click on the down arrow for 'More...' categories*
  iii. *Select **Sponsored Funding** from the list.*
  iv. *Select **Add new** to add a new grant, or select the **edit** icon on an existing grant to edit it.*
    v. *Complete the required fields*
  vi. *Select **Save and Return** to save the details and re-load the page.*

7. How to add/edit information on Public Presentations

→ *See S.14*

     i. *To add/edit information on Public Presentations, follow the guidelines in section '1. How to access a profile'*
    ii. *Select **Custom Category** from the list.*
  iii. *Select **Public Presentations** from the next list.*
  iv. *Select **Add new** to add a new presentation, or select the **edit** icon on an existing presentation to edit it.*
    v. *Complete the required fields.*
  vi. *Select **Save and Return** to save the presentation details and re-load the page.*

8. How to add/edit information on Conferences Hosted

     i. *To add/edit information on Conferences Hosted, follow the guidelines in section '1. How to access a profile'*
    ii. *Select **Custom Category** from the list.*
  iii. *Select **Conferences Hosted** from the next list.*
  iv. *Select **Add new** to add a new conference, or select the **edit** icon on an existing conference to edit it.*
    v. *Complete the required fields.*
  vi. *Select **Save and Return** to save the conference details and re-load the page.*

9. How to add/edit information on Public Body Assignments

     i. *To add/edit information on Public Body Assignments, follow the guidelines in section '1. How to access a profile'*
    ii. *Select **Custom Category** from the list.*
  iii. *Select **Public Body Assignments** from the next list.*
  iv. *Select **Add new** to add a new assignment, or select the **edit** icon on an existing assignment to edit it.*
    v. *Complete the required fields.*
  vi. *Select **Save and Return** to save the assignment details and re-load the page.*

10. How to add/edit information on Visiting and Guest Lecturers Hosted

     i. *To add/edit information on Public Body Assignments, follow the guidelines in section''1. How to access a profile'*
    ii. *Select **Custom Category** from the list.*
  iii. *Select **Visiting & Guest Lecturers Hosted** from the next list.*
  iv. *Select **Add new** to add a visiting or guest lecturer hosted, or select the **edit** icon on an existing entry to edit it.*
    v. *Complete the required fields.*
  vi. *Select **Save and Return** to save the details and re-load the page.*

11. How to Use the GENIUS reporting tool

The reporting tool allows you to obtain publication data for your department. To access the reporting tool go to '**Administration**' then select '**Global reporting**' then select '**Reporting Tool**'

To run an existing report (there are several reports that have been set up specifically for departmental reporting):

   i. *In the reporting tool, from the list of icons on the right hand side, select '**Get report**'*
   ii. *From the list in the pop-up window, select the appropriate Departmental report i.e. those reports beginning with 'Dept' and select the folder icon to open the report.* ***TAKE CARE not to DELETE any of the reports!***
   iii. *Opening the report takes you back to the reporting tool page where the chosen report is now open.*
   iv. *To run the report, select the 'Run' icon from the list of icons on the right hand side. A pop-up window will show the results of the report. The results can be exported to Microsoft Excel for further analysis or printed.*
   v. *To change the parameters of the query or layout please contact research.development@maynoothuniversity.ie for assistance.*

12. Exiting a Profile

Make sure all changes are saved before exiting a profile. To go to a different profile, follow the steps outlined in: **Accessing and editing a staff member research profile** above (page 5). When you have finished editing profiles, you can log out by clicking on the **Log Out** icon that is situated top left of the screen.

Tracking your Department's submitted research proposals (NEW PORTAL)

The ability to track your research Department's applications online can be carried out in the Proposal Tracking module on the **New Portal**. Please note, only those proposals that have been submitted through the Research Development Office since 1st January 2009, will be accessible through RIS.

1. How to locate your departmental proposal records

Follow the guidelines in Entering the Maynooth University Research Information System to log in. If you are unable to log into the system, please contact the Research Development Office: *research.development@maynoothuniversity.ie*

   i. *Once you have logged-in to the RIS, select the 'New Portal' icon at the top of the screen on the left hand side.*

→ *See S.15*

   ii. *To track your proposals click on the* **My Proposals** *tab on the left-hand side of the screen. A drop-down menu will then appear.*

   iii. *Using the* **Show List** *option:*
      a. *The* **Show List** *option is not relevant to Departmental Administrators.*

→ *See S.16*

   iv. *Using the* **Search For** *option:*
      b. *The Search For option enables a user to view a list of the proposals for your specified department.*
      c. *The* **Search For** *function is also used when a user has many proposals but only wishes to view specific records.*

→ *See S.17*

      d. *Select Search For from the menu.*
      e. *The* **Search For** *screen then loads.*
      f. *Select* **Locate** *to list all proposals on which you are the Principal Investigator (PI).*

→ *See S.18 (The search criteria fields covered by blue boxes are visible to all users but are* **NOT** *active fields within the Maynooth University version of the* **My Proposals***).*

      g. *The* **Set** *facility can be used to select search words or terms from an alphabetical list or via a filter option.*
   v. **Status:** *can be used to locate proposals according to their status. Choose an option from the drop-down list.*
   vi. *Once your search criteria have been selected, click on the* **Locate** *button to return the results. If there are too many results they can be filtered further by inputting other parameters.*
   vii. *The screen re-loads and your results are listed.*
   viii. *The results page contains details of the number of results returned and for each individual proposal: Institution proposal number, requested start date, proposal type, proposal title, sponsor name and scheme, Principal Investigator, and department.*

→ *See S.19*

ix. *To open up a proposal in summary format, select the **PT icon** on the left-hand side of each proposal record. A pop-up window opens displaying the summary of the proposal.*

x. *To view the proposal in greater detail, select the **Summary** tab on the left hand side.*

→ *See S.20*

2. How to navigate through your department Proposal Tracking (PT) record

The navigation menu can be used to select and view information for all sections of a proposal such as Sponsor, Personnel, Budget (Requested), Agreements, Attachments, etc.

→ *See S.21*

Please note: please ignore the link **New Proposal** as this is only for viewing proposals created using the Proposal Development module and currently no proposals are created using PD at Maynooth University.

i. ***Summary:*** *This screen displays the proposal in summary format. The field names and data seen within this screen should be self explanatory but should you have any questions please contact research.development@maynoothuniversity.ie*

ii. ***Sponsor:*** *The Sponsor screen displays all the information relevant to the sponsor (Funding agency) and scheme (Programme) to which the proposal is submitted.*

iii. ***Personnel:*** *The Personnel screen displays key personnel, significant contributors, and non-key personnel details. The Principal Investigator will be displayed within the **Key Personnel** section and is denoted by the greyed-out radio button. Co-Investigators will also be listed within the Key Personnel section.*

iv. ***Budget:*** *Click on the **Budget** link to view the main **Budget** screen. To view the budget information, click on the **Budget** tab.*

→ *See S.22*

v. ***Subcontracts:*** *Some proposals may have third party subcontracts and information relating to this will be held in this section. The subcontract document/s may also be associated with the proposal as an attachment.*

vi. ***Status History:*** *Information indicating the progress of the proposal can be viewed by following the **Status** link.*

vii. ***Awards:*** *All successful proposals will translate to an Award. The approved budget amount is displayed here. In some instances there may be a difference in the monetary values shown in the Requested Budget section compared with Awarded.*

viii. ***Related Proposals:*** *Information regarding related proposals can be viewed here. A Pre-proposal or an Expression of Interest, are examples of related proposals.*

ix. ***Attachments:*** *All documents associated with the proposal can be viewed here and may include: Full proposal, CVs, Letter of Offer, budget spreadsheets, Expression of Interest, subcontractor information, correspondence, copies of emails, supporting documents etc.*

3. How to use the Proposal Tracking (PT) reporting tool

  i. From the menu on the left hand side, choose '**Report on**'
 ii. From the next menu choose '**Reporting tool**'

To run an existing report (there are several reports that have been set up specifically for departmental reporting):

 iii. *In the reporting tool, from the list of icons on the right hand side, select '**Get report**'*
 iv. *From the list in the pop-up window, select the appropriate Departmental report i.e. those reports beginning with 'Dept' and select the folder icon to open the report.*
   TAKE CARE not to DELETE any of the reports!
  v. *Opening the report takes you back to the reporting tool page where the chosen report is now open.*
 vi. *To run the report, select the 'Run' icon from the list of icons on the right hand side. A pop-up window will show the results of the report. The results can be exported to Microsoft Excel for further analysis or printed.*
vii. *To change the parameters of the query or layout please contact* *research.development@maynoothuniversity.ie* *for assistance.*

4. Exiting a department Proposal Tracking (PT) record

  i. To exit the proposal window click on the **Done** icon (top left-hand side) and you will be returned to the main system screen.
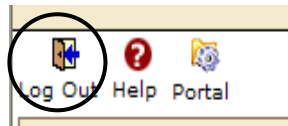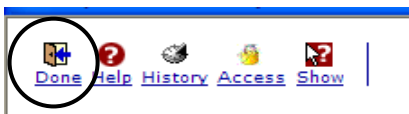
  ii. To exit the system from the main screen, click on the **Log out** icon (top left-hand side).

APPENDIX 1

Screenshots: (S)

S.1

S.2

S.3

S.4

S.5

S.6

S.7

S.8

S.9

S.10

S.11

S.12

S.13

Edit icon

S.14

S.15

S.16

S.17

S.18

💲Find Funding 🐾 CV Database

Proposals - Search For   Locate Clear

Use * for wildcard

Property	Matching Value		Property	Value
Sponsors/Schemes		Set	Title	
Primary Assoc. Dept.		Set	Status	
CI		Set	Deadline	-
Investigator		Set	Start Date	=
Approval Date	=		End Date	=
Proposal Number			Award Date	=
Award Number			Sponsor Tracking Number	
BU Number			Sub Contractor Number	
IRB Protocol Number			CFDA Number	
Proposal Type			IACUC Protocol Number	

S.19

Results   **2 Proposals Found**

Actions	Institution Number △▽ BU Number Proposal Type Award Number	Title	Requested Period	Awarded Period	Sponsor CI Department
📄	NUIM2009//00017 / Post-doctoral Fellowship	The role of Hsp70 in prion propagation	01-Oct-2009 - 20-Sep-2011	-None-	/IRCSET -- EMPOWER Postdoctoral Fellowship(**) Jones, GaryW Biology
PD PT	NUIM2009//00048 / Full Proposal	New Proposal Created for Cathy A Jones on 02-Feb-2009 4:31:49 PM	01-May-2009 - 30-Apr-2010	01-May-2009 - 30-Apr-2010	Enterprise Ireland Jones, GaryW Biology

S.20

Done Back Save Help History Access Show

The role of Hsp70 in prion propagation   Proposal NUIM2009//00017
Dr Gary W Jones- Biology (Irish Research Council for Science, Engineering
and Technology / IRCSET -- EMPOWER Postdoctoral Fellowship)

Proposal NUIM2009//00017
  Submissions (1)
    Post-doctoral Fellowship
      Summary
      Personnel (1)
      Budget
      Agreements (0)
      SubContracts (0)
      SubProjects (0)
      Attachments (0)
      Status History (3)
      Snapshot
      Access
  Awards (0)
  Keywords (0)

Type	Number	Master	Reportable	Created	Submitted	Status	Amount		Open	Delete
							Requested	Awarded	PD	
Post-doctoral Fellowship	NUIM2009//00017	⦿	☑	13-Jan-2009 16-Jan-2009	16-Jan-2009	Pending	83,100.00		📄	🗑

S.21

Done Back Save Help History Access Show

Proposal NUIM2009//00017
  Submissions (1)
    Post-doctoral Fellowship
      Summary
      Personnel (1)
      Budget
      Agreements (0)
      SubContracts (0)
      SubProjects (0)
      Attachments (0)
      Status History (3)
      Snapshot
      Access
  Awards (0)
  Keywords (0)

S.22

The role of Hsp70 in prion propagation
Dr Gary W Jones- Biology (Irish Research Council for Science, Engineering and Technology / IRCSET -- EMPOWER Postdoctoral Fellowship)

Proposal
NUIM2009//00017

Requested Project Period Dates 01-Oct-2009 - 20-Sep-2011

Currency Euro (I) ▾ Rate 1   [Set] [Void] [Get]

Prime

Budget Summary **Dr Gary W Jones - Biology**   [CS Hours]

Year/Period			Start	End	Directs	Overhead Costs	Sponsor	Inst	Project
1			01-Oct-2009	30-Sep-2010	€41,550	€0	€41,550	€0	€41,550
2			01-Oct-2010	30-Sep-2011	41,550	0	41,550	0	41,550
				Total	€ 83,100	€ 0	€ 83,100	€ 0	€ 83,100

Requested Budget

Applied to Period	View	Status	Delete	Type	Total
1	👓	Requested		Budget Period	€41,550
2	👓	Requested		Budget Period	€41,550

Research Development Office

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