

Creating and managing a user account and system symbols

What is a Research GEMS User Account?

Like other systems entered via password, a Research GEMS User Account is your unique 'key' to access areas of the system you need, based on your role.

The minimum detail required to create your User Account in GEMS is a username and password.

- ❖ The username is your preferred unique email address.
- ❖ The password is a set of characters of your choice. It must be at least eight (8) characters in length, comprising of at least one of each of the following: an uppercase letter, a lowercase letter, a number and a non-alphanumeric character e.g.
 - !@#%&* _ , ? ~

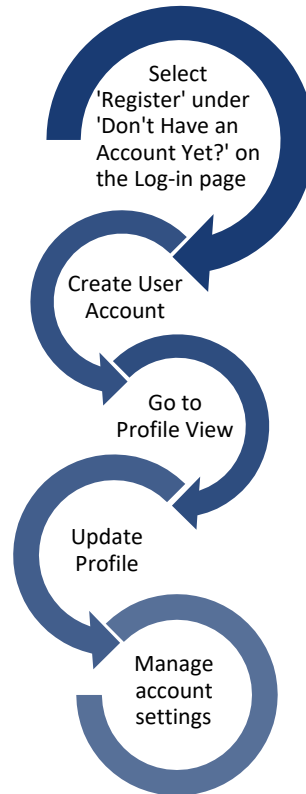
Associated with each User Account is a User Profile under which you can update and manage your username/password, personal details and contact information, as well as academic/professional appointments, employment and education details.

How does it work in Research GEMS?

Research Office Staff

Your User Account is generally created by a System Administrator. Your profile will be partially pre-populated with views and settings relating to your specific user role.

You may wish to add other details if relevant to your role/s.



Research Applicants and all other users

For all other users, setting up your User Account is the first action you must take to enter GEMS.

As a research team member, you should enter and maintain as many of your profile details as possible. This information may be used to assist with completion of details in applications such as HREA and/or SSA.

To assist, GEMS can draw information into your profile from an existing [ORCID](#) account, if relevant.

What information is needed?

You should have the following information ready to complete your User Account:

- ❖ A preferred email address
- ❖ A password that meets the required criteria
- ❖ Your ORCID, if relevant.

How to create a Research GEMS User Account

Step 1

Visit the [Research GEMS website](#) and on the homepage click the 'Register' button under 'Don't have an account yet?'.

Step 2

Complete the 'Register' screen with your email address, first name, last name and a password that meets the requirements on screen.

*NOTE: Accepted non-alphanumeric characters are ! @ # \$ % ^ & * _ , ? ~*

Don't have a Research GEMS account? [Register now](#) Click 'Register' to complete registration

A 'Registration Successful' message will appear, explaining that your account has been successfully registered.

Step 3

Open your confirmation email, and click the link to activate your account. A message will appear confirming activation. You are now ready to access GEMS.

How to update your User Profile

When you view your User Profile, the various profile sections appear on the left side panel. You can select these as required or work through them in order.

TIP: If you add details or make any changes to these sections, remember to click 'Save' before leaving the page.

Step 1

Once logged in, look for the top right purple menu bar with several icons.



Click 'Profile' to go to profile view.

Step 2

Update Personal Details

Your user profile opens in 'Account Settings', navigate to the 'Personal Details' section showing in the left hand side panel.

Data entered at log in will pre-populate into this section. Enter your ORCID if you have one.

NOTE: If you add your ORCID number GEMS will draw information across from your ORCID profile. This is not an automated process and will need to be completed each time you update ORCID.

Select the check boxes if relevant to you:

- ❖ Notification – Confirms you would like to receive relevant contact notifications by email
- ❖ Researcher – Flags if you conduct research.

Step 3

Update other profile sections

Click on the following options to update your profile as necessary;

Address Details

Add or update your physical, mailing and/or courier address.

Click '+ Add new address' to complete details.

Email Details

The email entered at login will appear as the preferred address.

Click '+ Add new email address' to enter more email contact details.

Phone Details

Add your mobile number, phone (landline), fax or Skype details here. For research applicants, this allows the Research Office to get in touch with you if required.

Click '+ Add new phone number' to enter phone numbers.

Social media contacts

Add social media contacts here. The following options are available from the dropdown menu; Facebook, Microsoft, Google, Twitter, Linked In and Other.

Enter a 'Contact URL' and select 'Type' from the dropdown menu.

Appointments

Relates to academic or professional roles you hold in addition to your primary job, e.g. Honorary Professor.

Click '+ Add new appointment' to enter appointment details

Educations, Publications, Funding and Employment

In the next sections; Educations, Publications, Funding and Employment you can track personal, research-related information. While each section is generally completed in a similar way, the Education section, allows you to import education details via your ORCID profile.

Click the '+ Add new' black button in each section to enter appropriate details.

Account Settings

Manage your username and password from Account Settings – the final section under Profile.

Click 'Change username' to update the username. Enter your password for verification.

Click 'Change password' to update your password.

NOTE: If you believe you have multiple user accounts and want to merge the accounts, please contact your local research office.

Availability

Update your availability in this section.

Updating your Research GEMS Username and Password

How to update your Research GEMS User Account

Step 1

Once logged in, look for the top right purple menu bar with several icons.



Click 'Profile' to go to profile view.

Step 2

From the left-hand menu, select the area you wish to update.

Step 3

Email Details

Ensure that your preferred email address is listed as all GEMS email notifications and correspondence will be sent to there. Select '+Add new email address' and select it as your 'Preferred' address.

This is recommended if you are changing your username at account settings.

Step 4

Account Settings (Username and Password)

Change your username by using the change username button.

A username must be in an email format and must be unique.

TIP: If you believe you have multiple user accounts and want to merge the accounts, please contact your local research office.

You can change your password by using the change password button.

The password must be a minimum of eight (8) characters in length, containing at least one of each of the following: an uppercase letter, a lowercase letter, a number and a non-alphanumeric character e.g. *!@#%&* _?~

Symbols

This section provides information on the symbols and characters used in GEMS. When first logging in to GEMS, you will have a top right menu navigation that represents broad key functions you will use.

Top right menu navigation

All users will see the following icons at the top right menu navigation. This will be visible from all pages within GEMS.

	Click 'Sign out' icon to log out of GEMS
	Click 'Projects' to view all projects or create a new project under your user profile
	Click 'Profile' to view your user profile details
	Click 'Help' to read help text for this page
	Click 'Dashboards' to manage data

If you are a Human Research Ethics Committee (HREC) Chair or Member, you will see some additional icons to those above. These will appear when you have ethics applications for your review.

	Click 'Meetings' to view the HREC meetings to which you have been assigned
	Click 'Reviews' to action your review of applications to which you have been assigned

Another icon will appear if you are either a Public Health Organisation Head of Department or Chief Executive.

	Click 'Decisions' to action decisions that need to be made
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System navigation symbols

There are navigation symbols to help you progress through each page and section in the application forms.

	Click to 'Download and Preview' the project. The project downloads as a .zip file to the location as set on the browser
	Click to 'Save' at any stage when completing any section or application in GEMS
	Click 'Right directional arrow' to go to Next page of the section or application
	Click 'Left directional arrow' to go to Previous page of the section or application

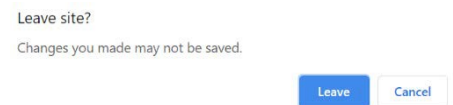
General functionality

Below are general functions that are used throughout the system.

	Click 'Save' at any time in each screen or page.
	Click 'Reset' to clear values in all fields on a page.
	Click 'Cancel' to cancel the action being completed on the page
	Click 'Edit' allows the selected record available for changes
	Click 'Delete' allows removal of the selected record. CAUTION: This action is <u>not reversible</u>
	This allows for setting of the number of saved records to display on one page
	Typing a phrase/word on the <i>Search</i> box will quick search on saved records
	If the number of records are not able to display on one page, the rest of the records are viewable by navigating the page numbers, or by clicking on <i>Previous</i> and <i>Next</i>
	This 'information' icon appears regularly

	throughout GEMS with further instructions
	Click 'Upload' when you have been asked to add new documents to GEMS
	There will be questions that will require you to choose a 'Yes/No' answer. A check mark will appear when you click on your selected choice
	Some screens will have 'Next' and 'Back' navigation buttons to progress to the next screen, or revert to the previous screen

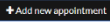
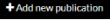
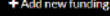

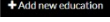

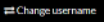
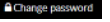
GEMS will prompt you if it detects that there are unsaved changes on the page when you are navigating to another page.



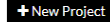
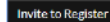
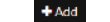

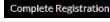
- ❖ If you click 'Leave', you will discard the unsaved changes.
- ❖ Clicking 'Cancel' will allow you to check the page.

There are also general action functions that are used in specific sections of the system.









LOG IN	
	Click 'Sign In' at the log in screen, after completing your username and password
	Click 'Reset password' when you have forgotten your password
PROFILE	
	Click '+ Add new address' to update your address details. GEMS will allow more than one address
	Click '+ Add new phone number' to update your phone number. You can have more than one and choose your preferred contact number
	Click '+ Add new email address' to update your email address. You can have more than one and choose your preferred contact

	Click '+ Add new appointment' to add roles held in addition to your current job position
	Click '+ Add new publication' to update publications not in ORCID . Otherwise, you may click a link underneath this icon to import data from ORCID
	Click '+ Add new funding' to update your profile with funding information.
	Click '+ Add new employment' to update your profile with your employment information
	Click '+ Add new education' to update your profile with your education details
	Click '+ Add new document' to update any documents relevant to your profile
	Under Profile, you can click 'Change username' to update the username of an existing user account
	Under Profile, you may click 'Change password' to update your password of an existing user account

IN PROJECT REGISTRATION

	Click '+ New Project' to start the process of registering a project
	Click 'Invite to Register' to invite members of your research project team who are not yet registered in GEMS
	Click '+ Add' when you have completed the email address (username) of the person you are inviting to register
	This green check mark icon will appear against each section in Project Registration, once it has been completed
	Click 'Complete Registration' when you have a green check mark against all sections and you are ready to finalise the registration

APPLICATIONS AND FORMS

	This question icon provides more information on the topic or question
	Click 'New form' to add a new application (HREA or SSA) or post-project approval form
REVIEW – for a Reviewer	
	Click 'Select all' to select all items in the list provided
	Click 'Select none' to unselect all items in the list provided
	Click 'Download' to download documents selected to the location as set on the browser
	Click 'Review application' to provide feedback on an application
	Click 'View review' after successful submission of the review to view all details
	Click 'Download application' to download the application