



# Science Foundation Ireland Grants and Awards Management System – SESAME

## User Guide – Researcher

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## Module 1: User Guide Overview

This guide provides an overview of the functionality of SFI's Grants and Awards Management system– SESAME and the detailed instructions on how to use the system to manage your interaction with SFI.

The guide includes details on the preparation and submission of an application to SFI and the management of your contact profile, which contains information on your qualifications and research outputs. These can be used in the compilation of your annual reports following award.


You can use this guide in a number of ways:

- As a **self-paced training guide** to familiarise you with SESAME.
- As a reference guide to the functions within SESAME.

### Prerequisites

In reviewing these materials it is important that you have read the related call and policy documentation provided by SFI.

### Tips by Einstein in this manual

	<p>Throughout this guide you will find useful tips annotated by Einstein. You will find these tips practical in getting a better understanding of using SESAME.</p>
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## Module 2: Getting Started with SESAME

### Objectives

*Upon completion of this module you will be able to:*

- Login to SESAME.
- Describe the Researcher SESAME workbench.
- Configure your Personal Settings.

### SESAME System Overview

SESAME is a web based system which enables:

- Research Office representatives to set up accounts for researchers associated with their research body.
- Once you have been set up as a contact in SESAME you will be able to:
  - Maintain a comprehensive profile including research outputs to facilitate future annual report preparation. **In order to submit an application to SFI will need to complete basic information only in your profile including contact details, year of PhD etc.**
  - Review current open SFI Programme Calls which are available in SESAME and complete eligibility questionnaires, where applicable.
  - Complete SFI Grant applications. During this process, and where applicable, you will;
  - Provide all mandatory call information through a combination of data entry into text fields and upload of PDF documents
  - Associate co-applicants and collaborators
  - Create a requested budget
  - Associate specific research activities from your profile to support the application including research funding support.
- If your application is awarded then you will use SESAME to manage the active grant with the following activities:
  - Submission of annual scientific reports and financial reports. Research Body Finance Office staff can monitor the payment process through the system and submit financial reports.
  - You will be able to use the system for submission of budget reallocations requests and no cost extension (NCE) requests. Research Body staff must endorse budget reallocation requests and no cost extension (NCE) requests before submission to SFI.

### Role of Research Body

Staff in your research body's research and finance office will also use SESAME to perform the following activities:

- Activate your use of the system by creating your basic researcher profile.
- Review and endorse any application you create before submission to SFI.
- Review and endorse reporting required by the grant.
- Review and endorse any budget reallocations and no cost extensions before submission to SFI.

### Registration through the Research Office

Your access to SESAME is controlled by your Research Office.

In order to access the system you must first request access through your Research Office. Please follow your internal organisational process to request this access.

Once your profile has been set up by the Research Office, you will receive an email similar to the one shown below containing your username, password, SFI PIN number and SESAME website address.

Dear Prof X,

You have been registered in SESAME, Science Foundation Ireland's system for Awards Management.

If you have any questions you can e-mail [john.smith@uoi.ie](mailto:john.smith@uoi.ie) or the appropriate contact in your local research office.

Your user name is [x.y@uoi.ie](mailto:x.y@uoi.ie) and your temporary password is CHALRAEND.

Your SFI PIN number is A826 E5S5 6EAA F27X XXXX X.

If you are a grant applicant, you will need to provide this PIN number to colleagues in order for them to associate you with any application they are preparing, where you will be designated as a co-applicant.

You can click the link below to log into SESAME.

<https://grants.sfi.ie>

Once you log in you will be prompted to change your password.

Welcome to the SESAME community

### Previous SESAME User

If you have been previously registered as a SESAME user with another institution then you should inform your current Research Office.

Once authorised, SFI staff can move your existing profile to your current research body.




### Logging into SESAME

The SESAME Grants and Award Management System is accessed using the Internet and there is no requirement for the installation of SESAME specific software. You can access SESAME from any computer connected to the Internet from any location. However, the configuration of some browsers and internet infrastructure (popup blockers, firewalls, etc.) can restrict an individual's access to the internet and as a result to the SESAME system. If you are having any such difficulties please contact your internal IT support team in the first instance.

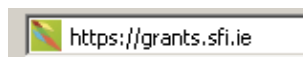
The SESAME system is accessed using the following Internet address:

**<https://grants.sfi.ie>**

1. Start your **Web Browser**.

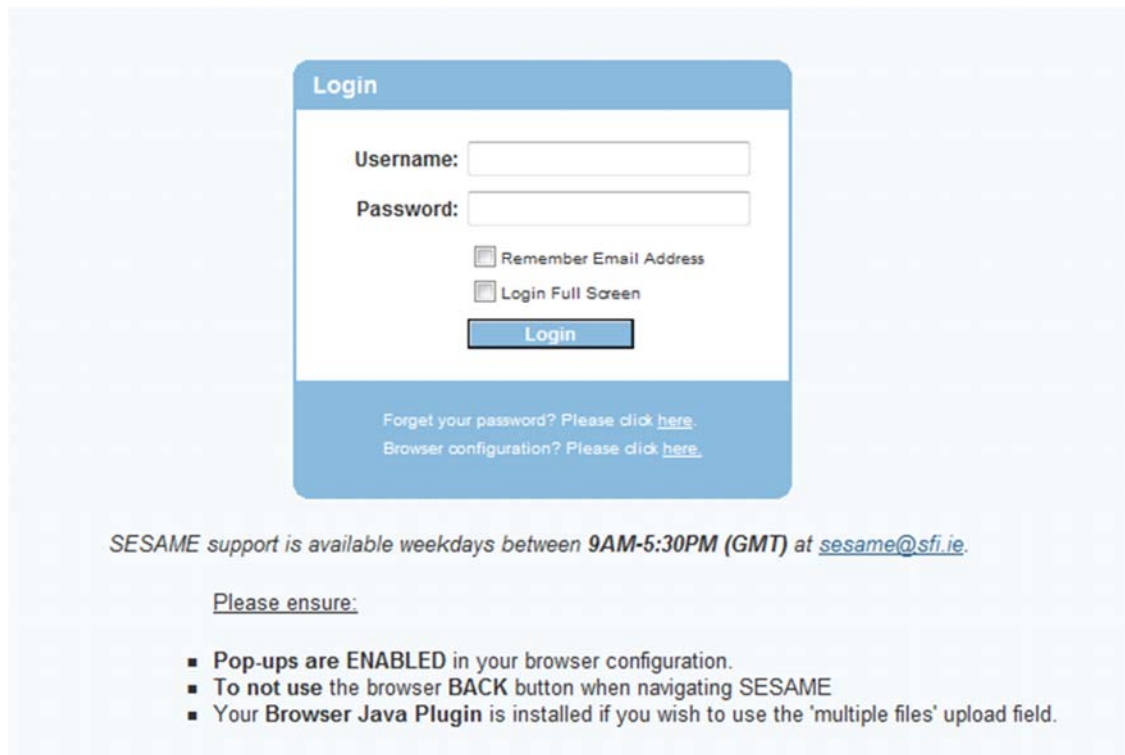
	SESAME supports Internet Explorer, Chrome and FireFox. With Mac we recommend that you use either Firefox or Chrome.
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2. Type the SESAME **address** into the **address bar** of your browser.



3. Press the **Enter** key or click the **Go To** button.

The SESAME login page is displayed.




The screenshot shows the SESAME login page. It features a blue header with the word "Login". Below the header are two input fields: "Username:" and "Password:". Underneath these fields are two checkboxes: "Remember Email Address" and "Login Full Screen". A blue "Login" button is positioned below the checkboxes. At the bottom of the login form, there are two links: "Forgot your password? Please click [here](#)." and "Browser configuration? Please click [here](#)."

*SESAME support is available weekdays between 9AM-5:30PM (GMT) at [sesame@sfi.ie](mailto:sesame@sfi.ie).*

Please ensure:

- **Pop-ups are ENABLED** in your browser configuration.
- **To not use** the browser **BACK** button when navigating SESAME
- Your **Browser Java Plugin** is installed if you wish to use the 'multiple files' upload field.

	<p>It would be a good idea to save this page to your 'favourites', as you will be using this page frequently.</p>
---	---

### Pop-up Blocker Detection


If your browser has a pop-up blocker enabled the following message will be displayed at the top of the SESAME login page.



The screenshot shows a warning message at the top of the login page. The message is enclosed in a red border and contains a yellow warning icon with an exclamation mark. The text reads: "We have detected that you are using a pop-up blocker. To use some features, you will need to allow pop-ups or disable your pop-up blocking software." Below the warning is the login form, which has a blue header with the word "Login". The form contains two input fields for "Username:" and "Password:". Below these fields are two checkboxes: "Remember Email Address" and "Login Full Screen". A blue "Login" button is positioned below the checkboxes. At the bottom of the form, there are two links: "Forgot your password? Please click [here](#)." and "Browser configuration? Please click [here](#)."

You must choose the browser option to allow pop-ups from SESAME.

If you do not enable pop-ups when using SESAME, many functions within the system will appear not to function, simply because the associated pop-up window cannot be displayed.

	<p>Sometimes you may find your browser will have more than one pop-up blocker installed through various toolbars, spam blockers, virus checkers etc. All Pop-up blockers need to be disabled when accessing SESAME.</p>
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### SESAME Login Screen Options

There are four additional options on the login page:

- **Remember Email Address** – if selected the email address you use to log in will be stored on the computer you are using and pre-populated whenever you access the SESAME login page from this computer in the future. The password will not be stored on the computer.
- **Login Full Screen** – when selected the browser toolbars will be hidden when you log in. This provides for more room on the webpage.
- **Forget your password?** – clicking this link and entering your email address will trigger an email to your email address with a new password.

- **Browser Configuration** – displays the configuration of your browser to ensure that all the settings are correct to use the platform.

In order to login you must:

4. Type your **full e-mail address** when prompted for your Username.
5. Type your case-sensitive **password** as previously provided by SFI, in your welcome email.

Username:

Password:

Click the **Login** button.



You are logged into SESAME and the Researcher Workbench is displayed.

**University of Ireland Researcher Workbench**  
 Welcome: Ellen Murphy

**Welcome to the SESAME Workbench**

The SESAME Workbench enables you to readily access information relating to SFI proposals to which you are associated. You have the ability to manage your personal profile, to create new applications to open calls, to track applications from submission through to award decision and to manage your awards through report submission to SFI. All calls include an eligibility questionnaire to assist you in determining whether you are eligible to apply. Your personal profile within SESAME includes both your contact details and relevant research outputs which will be used in the submission of annual reports to SFI.

**Active Awards**  
1

**SFI Open Calls**  
 SFI President of Ireland Young Researcher Award Programme (PIYRA)  
 Duration: 3-5 Years  
[PIYRA\\_call\\_document.pdf](#) [Apply](#)

**Manage Profile**  
Click here to manage your profile.

**Change Password**  
Click here to change your password.

Current Applications | **Active Awards** | Non-Active Awards

Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit
-------------	---------------	------------	--------	--------------	------	-------------

The workbench is divided into a number of areas.

### Workbench Header



The title bar displays your Research Body name, your name and links to the following standard features:

- **Home** – will return you to the workbench from any screen you are currently viewing.
- **Profile** – provides access to your researcher profile details.
- **Help** – access to help files and policy documents..
- **Logout** – logs you out from SESAME.

### Workbench Introduction Text


A basic introduction to the Researcher Workbench is displayed on the left below the Header.

#### Welcome to the SESAME Workbench


The SESAME Workbench enables you to readily access information relating to SFI proposals to which you are associated. You have the ability to manage your personal profile, to create new applications to open calls, to track applications from submission through to award decision and to manage your awards through report submission to SFI. All calls include an eligibility questionnaire to assist you in determining whether you are eligible to apply. Your personal profile within SESAME includes both your contact details and relevant research outputs which will be used in the submission of annual reports to SFI.

**Active Awards**  
1

You should note that, effective from 7 November 2013, the layout of your profile on SESAME has changed. To add research outputs to your profile, click on **Manage Profile** and click on **Research Profile**. For more detailed guidelines click on the **Help** button or see our webinar on the [SFI website](#).



**Manage Profile**  
Click here to manage your profile.



**Change Password**  
Click here to change your password.

### Links to Active Awards

The workbench provides a link so you can directly access any active awards.

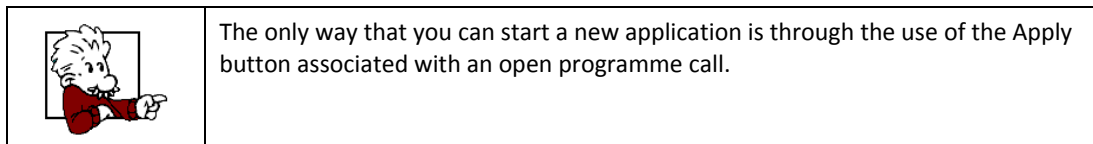


## Open Programme Calls List

All SFI open programme calls are displayed in the panel to the right of the page.




- The call list will change reflect when SFI creates and opens a new call in SESAME. Please note that during the rollout of SESAME, not all SFI calls will be available in SESAME.
- Clicking on the **Apply** link will display the eligibility questionnaire associated with the call.



## Manage Profile and Change Password

The links below the Workbench Introduction provides you with the ability to manage your profile and change your password.



In the next module you will review the Profile features.

## SFI Application List

The SFI Application list is displayed at the bottom of the workbench.

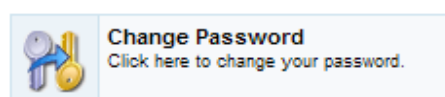
Current Applications		Active Awards	Non-Active Awards			
Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit

This list provides you with a list of all your applications and awards.

- The **Current Applications** tab displays any active applications
- The **Active Awards** tab displays any active awards with SFI
- The **Non-Active Awards** tab displays any non-active awards with SFI

## Changing your Password

You can change your password directly from the Workbench by clicking the Change Password link.




The Change Password window is displayed.

Change Password	
<a href="#">View Contact</a>   <a href="#">Edit Contact</a>	
Old Password:	<input type="password"/>
New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>
Policy:	Minimum Characters - 8 Must use at least 2 of the following 4 character sets: - Upper case alphabetic characters (A-Z) - Lower case alphabetic characters (a-z) - Numeric values/digits (0-9) - Special Characters (!~&@#S%^&()-+*=_ <.,?)
<input type="button" value="Submit"/>	

1. Enter your current password (**Old Password**).
2. Enter your new password (**New Password**).  
The new password must conform to the password policy as described on the screen.
3. Re-enter the new password (**Confirm New Password**).
4. Click the **Submit** button.

Your password is changed and you must use this new password from now on to log into SESAME.


	<p>If you forget your password you can request a new password to be sent to your email address from the SESAME login page.</p> <p style="text-align: center;"><input #"="" type="button" value="Forget your password? Please click &lt;a href="/>here."/&gt;</p>
---	--

### Logging Out

When you are finished using SESAME you should log out from the system.

1. Click the **Logout** button.

You are logged out from SESAME.

	<p>SESAME will automatically log you out if you:</p> <ul style="list-style-type: none"> <li>• Leave the browser session idle for more that 60 minutes.</li> <li>• Attempt to navigate away to another site using the same browser window.</li> <li>• Please be aware that this could cause records to lock (depending on your activity at the time). If this happens, the next time you access the record you will get a 'record locked' message, please contact <a href="mailto:sesame@sfi.ie">sesame@sfi.ie</a> for assistance</li> </ul>
---	---

## Module 3: Managing your Researcher Profile

*Upon completion of this module you will be able to:*

Update your Researcher Profile.

Add Profile Transactions.

### Research Profile Overview

The creation and maintenance of your profile simplifies the application process and annual report submission in a number of important ways.


- Your profile is independent of any application but general information including contact details and year of PhD (or equivalent) are automatically associated with your application.
- For the preparation of annual reports you can select entries (called transactions in SESAME) in your profile or you can enter them directly when completing an annual report.

Your Researcher profile consists of two types of information.

- General information ranging from contact information, date of birth, and nationality to detailed information on key achievements and research outputs.
- You can add any number of specific activity-based information such as Publications, Conferences/workshops organised and Professional Society membership, etc. to your profile and then choose which ones to attribute to a specific annual report. Currently research funding support may also be added from your profile in the preparation of applications to SFI programmes submitted on SESAME.

### Updating your Profile

A very basic researcher profile will have been created by research office staff when they first add your contact details to SESAME. You will now see how to extend that profile before starting the application process.




- You do not need to update your profile in any particular sequence nor do you need to complete the process in a single session.
- You can log in as often as you need in order to complete your profile.
- **You can start an SFI application without completing your profile but you should have completed the mandatory fields (shown in red) before submitting the application for review.** Details of research outputs are not needed in your profile to complete an application.

**PLEASE NOTE THAT YOU MUST COMPLETE ALL MANDATORY FIELDS UNDER THE BASIC PROFILE SUBMISSION BEFORE SUBMITTING AN SFI APPLICATION. YOU WILL BE UNABLE TO SUBMIT WITHOUT THIS INFORMATION.**

- You should remember to update your profile on a regular basis.

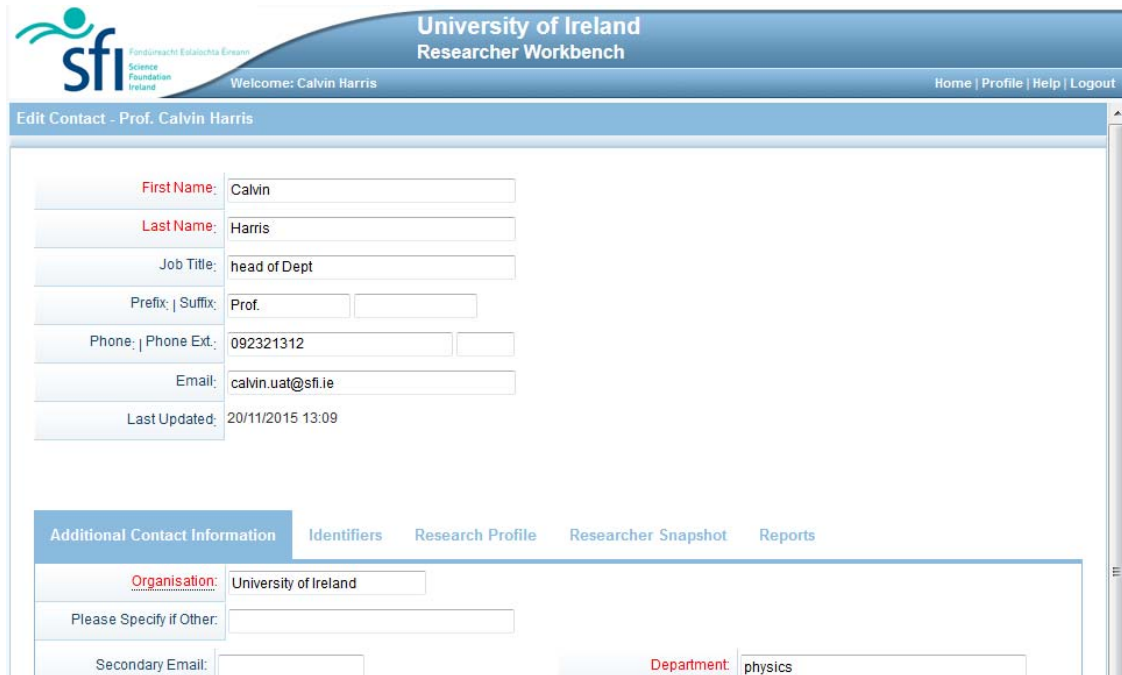
1. Log in to SESAME using the instructions in Module 1 and view your Researcher workbench.
2. You can access your profile by clicking on the “Manage Profile” button OR “Profile” button on the top right of your workbench (yellow boxes).



The screenshot shows the 'University of Ireland Researcher Workbench' interface. The top navigation bar includes 'Home', 'Profile', 'help', and 'Logout'. The 'Profile' button is highlighted with a yellow box. Below the navigation bar, there is a 'Welcome to the SESAME Workbench' section with a description of the workbench's capabilities. To the right, there is a 'SFI Open Calls' section listing various funding opportunities with 'Apply' links. Below the welcome message, there are two buttons: 'Manage Profile' (highlighted with a yellow box) and 'Change Password'. At the bottom, there is a table with columns for 'Proposal ID', 'Project Title', 'Grant Type', 'Status', 'Created Date', 'Role', and 'View / Edit'.

3. The Profile page is displayed.





University of Ireland  
Researcher Workbench

Welcome: Calvin Harris Home | Profile | Help | Logout

Edit Contact - Prof. Calvin Harris

First Name: Calvin

Last Name: Harris

Job Title: head of Dept

Prefix | Suffix: Prof.

Phone | Phone Ext.: 092321312

Email: calvin.uat@sfi.ie

Last Updated: 20/11/2015 13:09

Additional Contact Information Identifiers Research Profile Researcher Snapshot Reports

Organisation: University of Ireland

Please Specify if Other:

Secondary Email:

Department: physics

The profile screen consists of a Basic Contact Details section at the top of the page and a more detailed contact Information section below, which is divided into 5 tabs: Additional Contact Information, Identifiers, Research Profile, Researcher Snapshot and Reports.

By default, your profile opens with the Additional Contact Information section active. This section contains contact details such as address, email etc as well as some personal information such as gender, nationality and year of Ph.D.

### Additional Contact Information


#### Editing Basic Contact Information

To edit your basic contact details, simply enter the relevant data and Save.


1. Enter your **General Profile details** as appropriate.
  - Mandatory fields are indicated in red, all other fields are optional.
2. Please ensure that any existing information is correct and up to date.

Additional Contact Information	
Organisation:	University of Ireland
Please Specify if Other:	
Secondary Email:	
Website URL:	
Gender:	Female
Address 2:	
City:	Dublin
Post code:	
Country:	Ireland
Year of Ph.D. (or equivalent):	2005
If equivalent, please explain	
<b>Save</b>	

### 3. Click on **Save**

	<p>Remember, if you change your email address, you should also update your profile. You should then use your updated email address for future logins.</p>
---	---

## Identifiers

Additional Contact Information	Identifiers	Research Profile	Researcher Snapshot	Reports
Your SESAMEID:	1102000			
SFI PIN Number:	A826 E5S5 6EAA F27X XXXX X			
ORCID ID:				
ORCID ID:	<a href="#">Connect to ORCID</a>			
Photo:	 <a href="#">Upload</a> <a href="#">Take Picture</a>			
<a href="#">Previous</a>		<a href="#">Next</a>		

### Your SESAMEID


This ID is generated by the SESAME system and is your unique identifier for your user account.

### SFI PIN Number

Every Researcher registered through their research office is given a unique SFI PIN number.

- This unique identifier is used to reference co-applicants when creating an application.

- The purpose of the PIN number is to ensure that you can only associate colleagues to your applications if they have provided you with their PIN number.
- Likewise, only the colleagues with whom you have shared the PIN number can associate you as a co-applicant with their applications.

	If anyone uses your PIN to associate you with an application, you will receive an email to notify you that this has happened.
---	---

This PIN number is displayed as the first field in the General Information tab.

SFI PIN Number:	A826 E5S5 6EAA F27X XXXX X
-----------------	----------------------------

## ORCID ID

From the Identifiers tab you may link your SESAME profile to your ORCID ID.

1. Click on Connect to ORCID. Note: if you are already connected to ORCID, your ORCID ID will display and you will not have a Connect button.

The screenshot shows the 'Identifiers' tab in the SESAME interface. The 'Connect to ORCID' button is highlighted with a red box. The interface includes a navigation bar with tabs for 'Additional Contact Information', 'Identifiers', 'Research Profile', and 'Researcher Snapshot'. Below the navigation bar, there is a table with the following information:

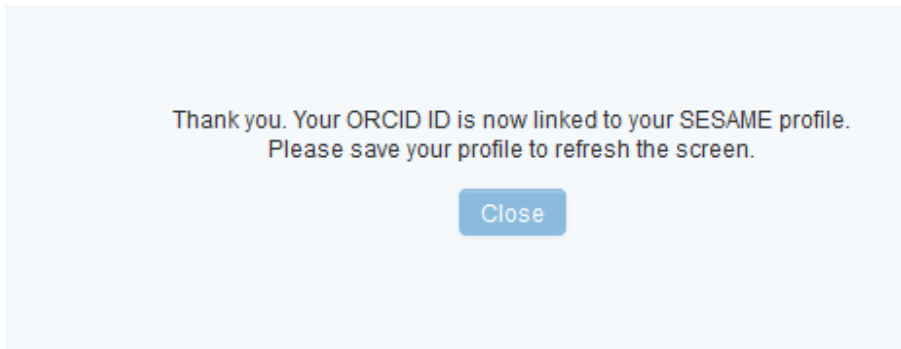
Your SESAMEID:	1101593
SFI PIN Number:	A816 FAS5 6DEF FA2X XXXX X
ORCID ID:	
ORCID ID:	<a href="#">Connect to ORCID</a>
Photo:	<a href="#">Upload</a> <a href="#">Take Picture</a>

2. This will open a new ORCID window.

The screenshot shows the ORCID authorization window. The 'Register' button is highlighted with a red box. The window displays the ORCID logo and the text 'Science Foundation Ireland' with a help icon. Below this, it states 'has asked for the following access to your ORCID Record'. There is a checkmark icon and the text 'Read your ORCID record'. A checkbox is checked, and the text reads: 'Allow this permission until I revoke it. You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.' Below this, it states: 'This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).' There is a link 'Don't have an ORCID iD?' followed by the 'Register' button. Below this are input fields for 'Email or iD' and 'Password'. There is a link 'Forgotten password?' and a 'Deny' button, followed by the 'Authorize' button, which is also highlighted with a red box.

3. If you have an ORCID account, log in and click on Authorise. Otherwise, create an ORCID account by clicking on Register.

- You will get a confirmation message.

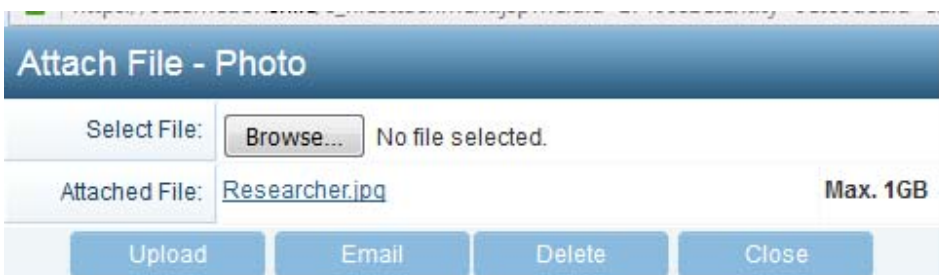


- Click on Close, then save your profile.
- Your ORCID ID will show on your profile.



**Photo**

You may upload a photo to your profile by clicking on the Upload or Take Picture buttons within the Identifiers tab. To Take Picture you must have a webcam enabled. To Upload a Photo, please click on Upload and browse to your hard drive to upload a photo.



Please note that if you are required to update a Researcher Snapshot your photo will automatically be loaded into your snapshot. Steps for completing the Researcher Snapshot are below.

### Overview of the Research Profile Tab

1. The next part of your profile consists of individual research activities such as Education, Employment, Professional Studies and yours and your team’s outputs. These activities are also called “transactions” in SESAME.
2. These transactions are featured within the Research Profile Tab section.

First Name:	Davina	
Last Name:	Murphy	
Job Title:	Researcher	
Prefix:   Suffix:	Prof.	
Phone:   Phone Ext.:		
Email:	davina.uat@sfi.ie	
Last Updated:	22/11/2015 08:43	

Additional Contact Information   Identifiers   **Research Profile**   Researcher Snapshot   Reports

After modifying any of the transactions listed below please click **Save** button to update **Research Profile** tab.

**Education** (5) Add New Show

**Employment** (5) Add New Show

3. Each output / transaction type has associated Add new and Show buttons next to them. This allows the user to create new transactions and view existing transactions, respectively.
4. A number (in parentheses) next to each heading represents the number of transactions listed under that heading e.g. Funding Diversification (2) indicates that there are two Funding Diversification transactions entered under this heading. The user can either click on the Funding Diversification heading or the “Show” button to view this record. Clicking on the header or the Hide button will hide the details again.

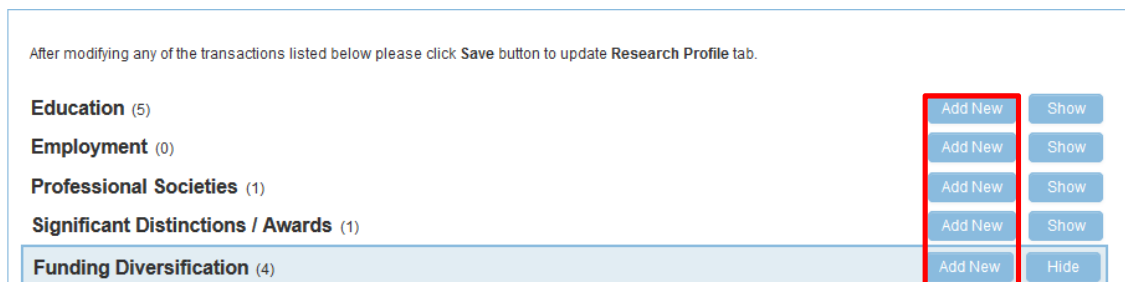
The following transaction types are available.

- Education
- Employment
- Professional Societies
- Significant Distinctions/Awards
- Funding Diversification
- Team Members

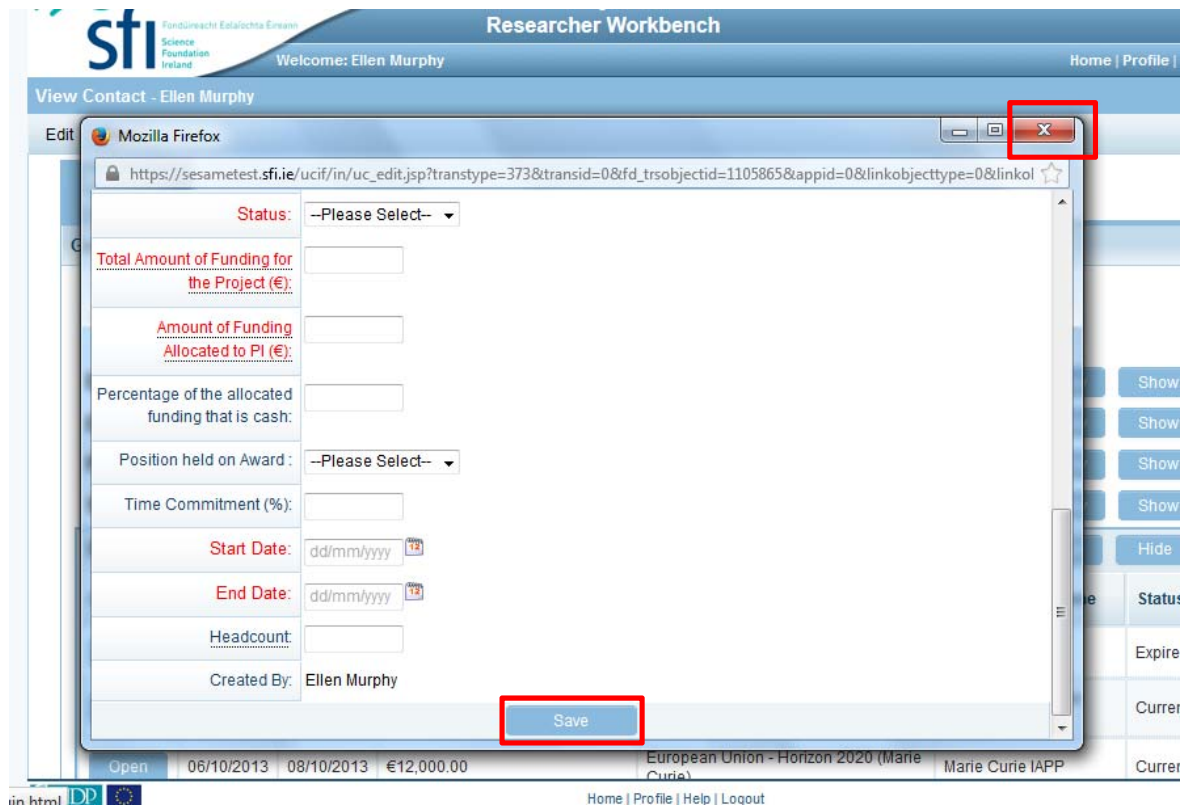
- Innovation & Commercialisation Activities
- Publications & Proceedings
- Presentations
- Academic Collaboration
- Non Academic Collaborations
- Conferences / Workshops / Seminars Organised
- Outreach Initiatives
- SFI Funding Ratio
- Education and Public Engagement (EPE)
- Technical Reports

### Adding records to the Research Profile Tab

1. Click on the **Research Profile** tab within your profile.
2. Click on the **Add New** next to whichever Output type you wish to update.



3. This will open a new pop up window in which you can complete the relevant fields for that section.
  - Mandatory fields are indicated in red, all other fields are optional.
4. Complete all relevant fields, scrolling down to the bottom of the window.



5. Click on **Save** and Close the window.
6. While the new transaction is saved, it will not be immediately visible on the Research Profile view. If you want to view your newly added transaction, click on **Save**.



7. For the most part, records are ordered according to a transaction ID; new additions go to the bottom of the list. With categories such as Publications and Proceedings, where you may need to add new transactions periodically, adding the most recent last will keep the list in date order, if so desired. Team members are ordered by Name.

### Viewing / Editing Records to the Research Profile Tab

For the most part, updating your profile involves adding new outputs. However, there are some circumstances where you will need to edit existing records to ensure they are up to date. For example, if you have added a publication that is “In press”, you will later need to edit this record



to show when the status has changed to “published”. When team members depart you will need to go back into the relevant record and enter their departure date.

1. To view existing records, click on the **Show** button next to the Output / transaction type you wish to view. This will display a list of all records entered under this section.
2. To edit these records, click on the **Open** button next to the relevant record. This will open the record in a new window.

After adding or modifying any of the transactions listed below please click [Refresh](#) to update **Research Profile** tab.

**Education** (1) [Add New](#) [Show](#)

**Employment** (1) [Add New](#) [Show](#)

**Professional Societies** (1) [Add New](#) [Show](#)

**Significant Distinctions / Awards** (1) [Add New](#) [Show](#)

**Funding Diversification** (3) [Add New](#) [Hide](#)

Edit/View	Start Date	End Date	Amount of Funding Allocated to PI (€)	Funding Body	Funding Programme	Status
<a href="#">Open</a>	05/09/2011	05/08/2013	€200,000.00	European Union - Horizon 2020 (ERC)	ERC	Expired
<a href="#">Open</a>	01/09/2013	30/09/2014	€50,000.00	Enterprise Ireland (EI)	Commercialisation Grant	Current

3. Update the relevant fields and click on **Save**.
4. Close the window.

### Copying Existing Records in the Research Profile Tab

1. If you wish to create a record that is similar to another, click on the **Open** button next to the relevant record. Click on **Copy**. This will create a new record with all of the details of the original record included.

The screenshot shows a web browser window with the URL [https://grants.sfi.ie/ucif/in/uc\\_edit.jsp?appid=0&fd\\_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ](https://grants.sfi.ie/ucif/in/uc_edit.jsp?appid=0&fd_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ). The form contains the following fields:

- Grant No.: 15/TIDA/1234
- Status: Current
- Total Amount of Funding for the Project (€): 123456
- Amount of Funding Allocated to PI (€): 100000
- Percentage of the allocated funding that is cash: 50
- Position held on Award: PI
- Time Commitment (%): 50
- Start Date: 11/06/2015
- End Date: 11/06/2015
- Headcount: 50
- Created By: Calvin Harris
- Team Member (Name) associated with this transaction: (empty field)

At the bottom of the form are three buttons: Save, Copy, and Delete. A red-bordered box on the right contains the following text: "For Census purposes, SFI is only concerned with 'Current Funding'. Although potentially relevant for other purposes within SESAME such as grant applications and annual grant progress reporting, the inclusion of 'Expired' or 'Pending' funding, is not required for your year-end census return."

- When prompted "Are you sure you want to copy this record?" click on **OK**

This screenshot is identical to the previous one, but with a confirmation dialog box overlaid in the center. The dialog box has the title "The page at https://grants.sfi.ie says:" and the text "Are you sure you want to copy this Funding Diversification?". It contains two buttons: "OK" (highlighted with a red box) and "Cancel". The background form is partially obscured by the dialog box.

- Make all the appropriate changes to the new record and click on **Save**.

4. Close the Window.

### Deleting Records from the Research Profile (Single Record)

1. If you wish to delete a single record, click on **Open** next to the record you wish to Delete.
2. Click on **Delete**

The screenshot shows a web browser window with the URL [https://grants.sfi.ie/ucif/in/uc\\_edit.jsp?appid=0&fd\\_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ](https://grants.sfi.ie/ucif/in/uc_edit.jsp?appid=0&fd_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ). The form contains the following fields:

- Grant No: 305678
- Status: Current
- Total Amount of Funding for the Project (€): 1000000
- Amount of Funding Allocated to PI (€): 1000000
- Percentage of the allocated funding that is cash: 100
- Position held on Award: PI
- Time Commitment (%): 50
- Start Date: 01/01/2015
- End Date: 01/01/2020
- Headcount: 5
- Created By: calvin harris
- Team Member (Name) associated with this transaction: Donald Duck

At the bottom of the form, there are three buttons: Save, Copy, and Delete. The Delete button is highlighted with a red box. A red-bordered text box on the right side of the form contains the following text: "For Census purposes, SFI is only concerned with 'Current Funding'. Although potentially relevant for other purposes within SESAME such as grant applications and annual grant progress reporting, the inclusion of 'Expired' or 'Pending' funding, is not required for your year-end census return."

3. A pop up message will appear saying "Do you want to delete the current transaction?" Click on **OK**

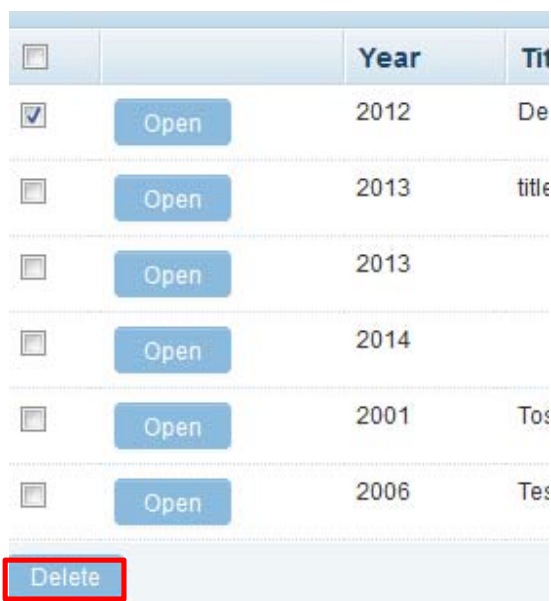
The screenshot shows a web browser window with the URL [https://grants.sfi.ie/ucif/in/uc\\_edit.jsp?appid=0&fd\\_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ](https://grants.sfi.ie/ucif/in/uc_edit.jsp?appid=0&fd_trsubjectid=1102000&linkobjectid=0&linkobjecttype=0&token=@Hw0OTBoaZ). The main form displays details for Grant No: 305678, Status: Current, Total Amount of Funding for the Project (€): 1000000, Amount of Funding Allocated to PI (€): 1000000, Percentage of the allocated funding that is cash: 100, Position held on Award: PI, Time Commitment (%): 50, Start Date: 01/01/2015, End Date: 01/01/2020, Headcount: 5, Created By: calvin harris, and Team Member (Name) associated with this transaction: Donald Duck. A modal dialog box is open in the center, titled "The page at https://grants.sfi.ie says:", with the question "Do you want to delete current transaction?". The "OK" button is highlighted with a red box. A red box on the right side of the dialog contains the text: "concerned with 'Current Funding'. Other purposes within SESAME such as grant progress reporting, the inclusion of which is not required for your year-end census". At the bottom of the main form are buttons for "Save", "Copy", and "Delete".

### Deleting Records from the Research Profile (Multiple Records)

1. If you wish to delete multiple records of a particular output type from your profile, click on **Open** next to any record within that output type e.g. if you wish to delete multiple presentations, click on **Open** next to any presentation. This will open the presentation for editing. In the top left corner of the window, click on View List.b

The screenshot shows a window titled "Edit Presentations". In the top left corner, the "View List" button is highlighted with a red box. To its right is a "New" button. Below these buttons, the form displays "Primary Proposal Attribution:" with a dropdown menu showing "09/RFP/MTR2286". Underneath, "Secondary Attribution:" is shown with two checkboxes: one for "06/CP/E004" and one for "07/IN.1/B1836 TIDA 09".

2. This will display a list of all of the records of that particular output type.



<input type="checkbox"/>		Year	Tit
<input checked="" type="checkbox"/>	Open	2012	De
<input type="checkbox"/>	Open	2013	title
<input type="checkbox"/>	Open	2013	
<input type="checkbox"/>	Open	2014	
<input type="checkbox"/>	Open	2001	Tos
<input type="checkbox"/>	Open	2006	Tes
<input type="button" value="Delete"/>			

3. Check the records you wish to delete and then click on Delete (the Delete button will not be visible until at least one item is checked). CAUTION: This cannot be undone.
4. Close the window to return to your profile.

In addition to manually entering publications, there are alternative facilities within SESAME to import publications individually and in bulk from external sources.

It should be noted that only a certain number of fields will be imported. Any remaining fields will have to be manually entered to complete the record.

### Importing from Pubmed

To import publications from Pubmed:

1. Open an existing publication or click on Add New.
2. Click on Search Publication Database

**New Publications & Proceedings**

View List New **Search Publication Database**

If you are using the Publication Database please click **Search Publication Database** above

**Primary Proposal Attribution:**

**Secondary Attribution:**

- 06/CP/E004
- 07/IN.1/B1836 TIDA 09
- 07/Y14/B1050
- 08/RFP/GEN1651

3. Enter criteria to search for records within pubmed and click on Search.

**Publication Search**

Database: pubmed Author: murphy

Title:  From:

To:

Keywords: alzheimers

**Results**

4. A list of publications satisfying the criteria entered will be returned (20 results per page). Click on the check boxes next to the publications that you want to import from the first page of results.

**Publication Search**

Database: pubmed Author: murphy

Title:  From:

To:

Keywords: alzheimers

**Results**

<input type="checkbox"/>	#	Summary
<input checked="" type="checkbox"/>	1.	<b>Title:</b> <a href="#">Assessing clinicopathological correlation in chronic traumatic encephalopathy: rationale and methods for the UNITE</a> <b>Authors:</b> Mez J, Solomon TM, Daneshvar DH, Murphy L, Kiernan PT, Montenegro PH, Kriegel J, Abdolmohammadi B, Fry B, E <b>Date:</b> 2015-10-12 <b>Issue:</b> 1 <b>ISSN:</b> <b>SO:</b> 2015 Oct 12;7(1):62
<input checked="" type="checkbox"/>	2.	<b>Title:</b> <a href="#">Down syndrome individuals with Alzheimer's disease have a distinct neuroinflammatory phenotype compared to spor</a> <b>Authors:</b> Wilcock DM, Hurban J, Helman AM, Sudduth TL, McCarty KL, Beckett TL, Ferrell JC, Murphy MP, Abner EL, Schmitt I <b>Date:</b> 2015-09-01 <b>Issue:</b> 9 <b>ISSN:</b> 0197-4580 <b>SO:</b> 2015 Sep;36(9):2468-74
<input type="checkbox"/>	3.	<b>Title:</b> <a href="#">Acyl-coenzyme A:cholesterol acyltransferase 1 blockage enhances autophagy in the neurons of triple transgenic Alzhe</a> <b>Authors:</b> Shikama Y, Min Z, Badier FX, Harris BT, Murphy SP, Khairallah A, Douze JD, Ghose CC, Ghose TK

5. Scroll down and click on Add

<input type="checkbox"/>	<p><b>18. Title:</b> <a href="#">Antisense oligonucleotide against GSK-3β in brain of SAMP8 mice improves learning and me</a>  <b>Authors:</b> Farr SA, Ripley JL, Sultana R, Zhang Z, Niehoff ML, Platt TL, Murphy MP, Morley JE, Kumar V  <b>Date:</b> 2014-02-01  <b>Issue:</b>  <b>ISSN:</b> 0891-5849  <b>SO:</b> 2014 Feb;67:387-95</p>
<input type="checkbox"/>	<p><b>19. Title:</b> <a href="#">Neuron-glia crosstalk in health and disease: fractalkine and CX3CR1 take centre stage.</a>  <b>Authors:</b> Sheridan GK, Murphy KJ  <b>Date:</b> 2013-12-18  <b>Issue:</b> 12  <b>ISSN:</b>  <b>SO:</b> 2013 Dec 18;3(12):130181</p>
<input type="checkbox"/>	<p><b>20. Title:</b> <a href="#">ATP13A2 (PARK9) protein levels are reduced in brain tissue of cases with Lewy bodies.</a>  <b>Authors:</b> Murphy KE, Cottle L, Gysbers AM, Cooper AA, Halliday GM  <b>Date:</b> 2013-05-09  <b>Issue:</b>  <b>ISSN:</b>  <b>SO:</b> 2013 May 9;1:11</p>
<input type="button" value="Add"/>	
<p>309 Records Found Page 1 <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a> <a href="#">8</a> <a href="#">9</a> <a href="#">10</a> <a href="#">11</a> <a href="#">12</a> <a href="#">13</a> <a href="#">14</a> <a href="#">15</a> <a href="#">16</a></p>	

6. Click on Create Transactions

National Center for Biotechnology Information Search	
<a href="#">Back</a>	<a href="#">Create Transaction(s)</a>
<input type="checkbox"/>	# Summary
<input checked="" type="checkbox"/>	<p><b>1. Title:</b> <a href="#">Assessing clinicopathological correlation in chronic traumatic encephalopathy: rationale and metho</a>  <b>Author:</b> McKee AC  <b>Date:</b> 2015-10-12  <b>Issue:</b> 1  <b>ISSN:</b>  <b>SO:</b> 2015 Oct 12;7(1):62</p>
<input checked="" type="checkbox"/>	<p><b>2. Title:</b> <a href="#">Down syndrome individuals with Alzheimer's disease have a distinct neuroinflammatory phenotype.</a>  <b>Author:</b> Head E  <b>Date:</b> 2015-09-01  <b>Issue:</b> 9  <b>ISSN:</b> 0197-4580  <b>SO:</b> 2015 Sep;36(9):2468-74</p>
<input type="button" value="Create Transaction(s)"/>	

7. The records will be added and the window will close, bringing you to a list of your current publications. Close the list to return to your profile. To refresh the view and see the new records on your profile, click on Save.

8. The records will be visible on your profile. The record will be marked as incomplete.

		Visual Presentation					
<a href="#">Open</a>	2015	Assessing clinicopathological correlation in chronic traumatic encephalopathy: rationale and methods for the UNITE study.	Alzheimer's research & therapy		10.1186/s13195-015-0148-8	Record Incomplete	180706
<a href="#">Open</a>	2015	Down syndrome individuals with Alzheimer's disease have a distinct neuroinflammatory phenotype compared to sporadic Alzheimer's disease.	Neurobiology of aging		10.1016/j.neurobiolaging.2015.05.016	Record Incomplete	180707
		Use of antibiotics in	The Veterinarian			Record	

### Importing Publications from ORCID

If you have not connected to ORCID from the Identifiers tab as detailed above, clicking ORCID Import will also allow you to secure a connection. Follow these steps to do so.

1. From the Research Profile tab click on the ORCID Import button next to the Publications & Proceedings output type.

**Innovation & Commercialisation Activities** (14)

**Publications & Proceedings** (9)

**Presentations** (1)

**Academic Collaboration** (1)

**Non Academic Collaborations** (131)

<a href="#">Add New</a>	<a href="#">Show</a>
<a href="#">ORCID Import</a>	<a href="#">Add New</a>
<a href="#">Add New</a>	<a href="#">Show</a>
<a href="#">Add New</a>	<a href="#">Show</a>
<a href="#">Add New</a>	<a href="#">Show</a>



- This will open a new ORCID window.

**ORCID**  
**Science Foundation Ireland** ⓘ  
has asked for the following access to your ORCID Record



Read your ORCID record

Allow this permission until I revoke it.  
*You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.*

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Don't have an ORCID iD? [Register.](#)

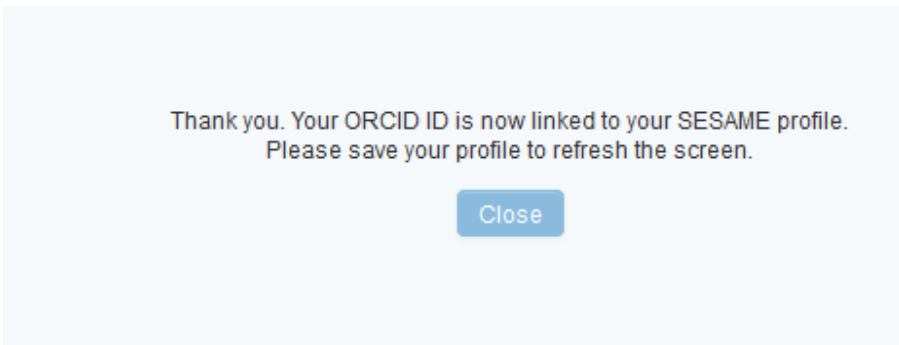
Email or iD

Password

[Forgotten password?](#)

[Deny](#) [Authorize](#)

- If you have an ORCID account, log in and click on Authorise. Otherwise, create an ORCID account by clicking on Register.
- You will get a confirmation message.



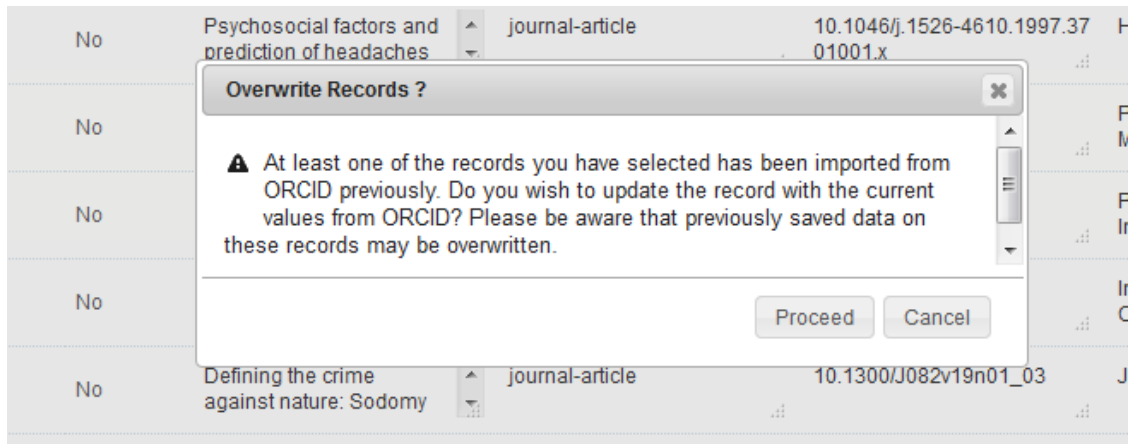
- Click on Close, then save your profile.
- Now click on the ORCID Import button again beside the Publications & Proceedings and this will display a list of the publications listed on your ORCID account.

<input type="checkbox"/>	Publication Exists <sup>1</sup>	Previously Imported from ORCID <sup>1</sup>	Title	Publication Type	DOI	Journal
<input type="checkbox"/>	No	Yes	The utility of Whole Genome Sequencing of	journal-article		
<input type="checkbox"/>	No	Yes	Cognitive and attentional functioning in	journal-article		
<input type="checkbox"/>	Yes	Yes	The Atlantic Multidecadal Oscillation without a role	journal-article	10.1126/science.aab3980	Science
<input type="checkbox"/>	Yes	Yes	Commercialized biomarkers: New	journal-article	10.1586/14737159.2015.1011622	Expert Rev Diagnosti
<input type="checkbox"/>	Yes	Yes	Bahamian speleothem reveals temperature	journal-article	10.1016/j.epsl.2015.08.035	Earth and Letters
<input type="checkbox"/>	Yes	Yes	Simulated changes in atmospheric dust in	journal-article	10.1002/2013PA002550	Paleocean
<input type="checkbox"/>	Yes	Yes	Linkage analysis and	journal-article	10.1111/epi.12730	Epilepsia

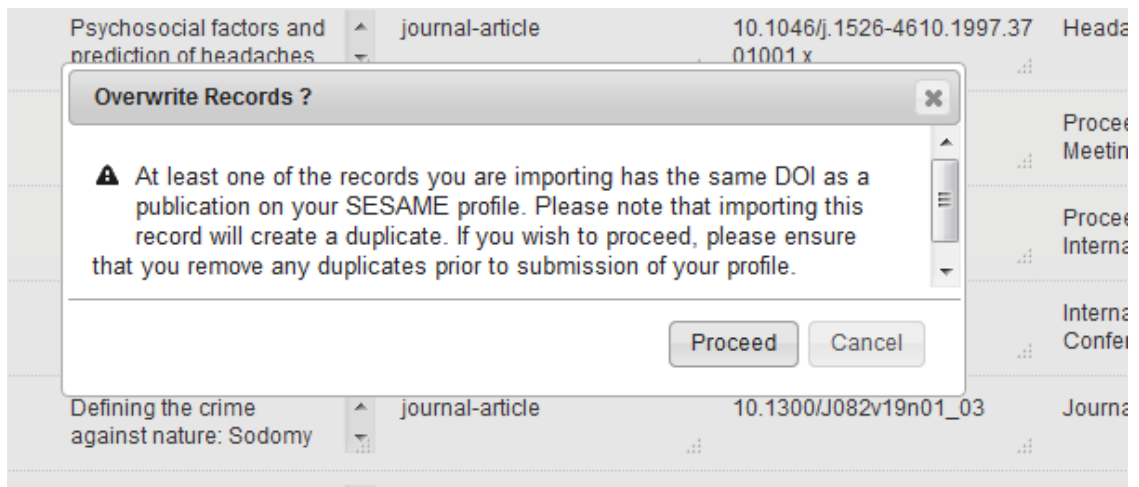
- If a publication is already on your profile, it will be flagged with a red “Yes” under the Publication Exists (if there is a record with this DOI on your profile) or Previously Imported from ORCID (if you have previously imported the record from ORCID – details are in the right most column of this window).
- Select the records you want to import to your SESAME profile and click on **Import**.

<input type="checkbox"/>	No	No	Network command processing system overview	conference-paper		
<input checked="" type="checkbox"/>	No	No	Defining the crime against nature: Sodomy in the	journal-article	10.1300/J082v19	
<input checked="" type="checkbox"/>	No	No	Adolescents' thoughts and feelings about AIDS in	journal-article	10.1016/0140-19	T
<input checked="" type="checkbox"/>	No	No	The house on Pacific Street: homosexuality,	journal-article		

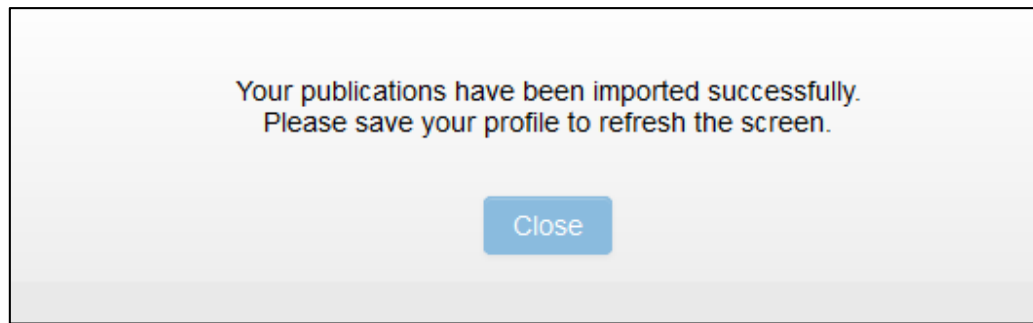
- If you select a record that already exists on your profile, you will get a caution.



10. If you choose to import records that already exist on your profile, the import will overwrite some key fields with the values on ORCID. If you wish to re-import the records, click **Proceed**. Otherwise, click on Cancel and then uncheck any items you do not wish to reimport. Then click Import again.
11. If you have a publication on your ORCID ID that has a matching DOI on an existing transaction on your profile, you will see a “Yes” below the Publication Exists column. If you select one or more of these records and then click the Import button on the ORCID Import window, you will get an warning message to indicate that a transaction already exists with the same DOI.



12. If you click on Proceed, this will create a duplicate record on your profile. Please ensure to remove any duplicates prior to submission. Otherwise, click on Cancel and uncheck any items you do not wish to re-import. Then click Import again.
13. The checked records will be imported.



14. Save your profile to refresh the publication list.

### Completing Imported Records

1. When records are imported from external sources, only certain fields imported, depending on the source data, so the record will be flagged as incomplete. Add any remaining data by clicking on Open.

you are using the Publication Database please click **Search Publication Database** above. Alternatively you can manually fill in the

<b>Primary Proposal Attribution:</b>	<input type="text"/>	<input type="button" value="v"/>
<b>Secondary Attribution:</b>	<input type="checkbox"/> 15/TIDA/1243	<input type="checkbox"/> Other SFI award <input type="checkbox"/> Other N
<b>Author List:</b>	Mez J, Solomon TM, Daneshvar DH, Murphy L, Kiernan PT, Montenegro PH, Kriegel J, Abdolmohamm Adams JW, Bourlas AP, Papadopoulos Z, McHale L, Ardaugh BM, Martin BR, Dixon D, Nowinski CJ, C Tripodis Y, Stein TD, Goldstein LE, Katz DI, Kowall NW, Cantu RC, Stern RA, McKee AC	
<b>Title:</b>	Assessing clinicopathological correlation in chronic traumatic encephalopathy: rationale and method	
<b>Publication Type:</b>	<input type="text"/>	<input type="button" value="v"/> <b>Note: Once the publication type is selected, presented for completion.</b>
<input type="button" value="Save"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>		

2. Click on Publication Type to select the type of publication the item is. Once the type is selected, the relevant fields will be displayed. All mandatory fields should be completed. Click on Save.

### BibTex Parser

1. Some ORCID records contain a bibtex citation of the publication fields which may contain more details of the publication than was directly imported from ORCID. This data is stored in the Citation field of the BibTex Parser section of the publication record.

2. To parse the bibtex citation into the existing record, click on Run. If the citation is not in BibTeX format, the data will not be parsed.

Author List:	Murphy, L.,Prencipe, M.,Gallagher, W.M.,Watson, R.W.
Title:	Commercialized biomarkers: New horizons in prostate cancer diagnostics
Publication Type:	Refereed Original Articles
<h3>BibTeX Parser</h3> <p>BibTeX is a platform-independent, plain-text format used for bibliographic citations. If the text in the below Citation corresponding SESAME publication fields. If it is not in BibTeX format, the data will not be parsed.</p>	
Citation:	bibtex-@article { murphy2015,title = {Commercialized biomarkers: New horizons in prostate cancer diagnostics}, = {4},pages = {491-503},author = {Murphy, L. and Prencipe, M. and Gallagher, W.M. and Watson, R.W.}}
BibTeX Parser:	<input type="button" value="Run"/>
Senior Author:	<input type="text"/>
How many co-authors are based outside Ireland (International Co-Publication)?:	<input type="text"/>
How many co-authors are from industry (Industry Co-Publication)?:	<input type="text"/>

## **Module 4: Updating your Researcher Snapshot**

*Upon completion of this module you will be able to:*

*Update your Researcher Snapshot*

*Submit your Snapshot to SFI*

*Extract your Approved Snapshot*

These completed snapshots are used by the Foundation to inform third parties about the work being carried out by SFI researchers, with particular emphasis on communicating their work to industry.

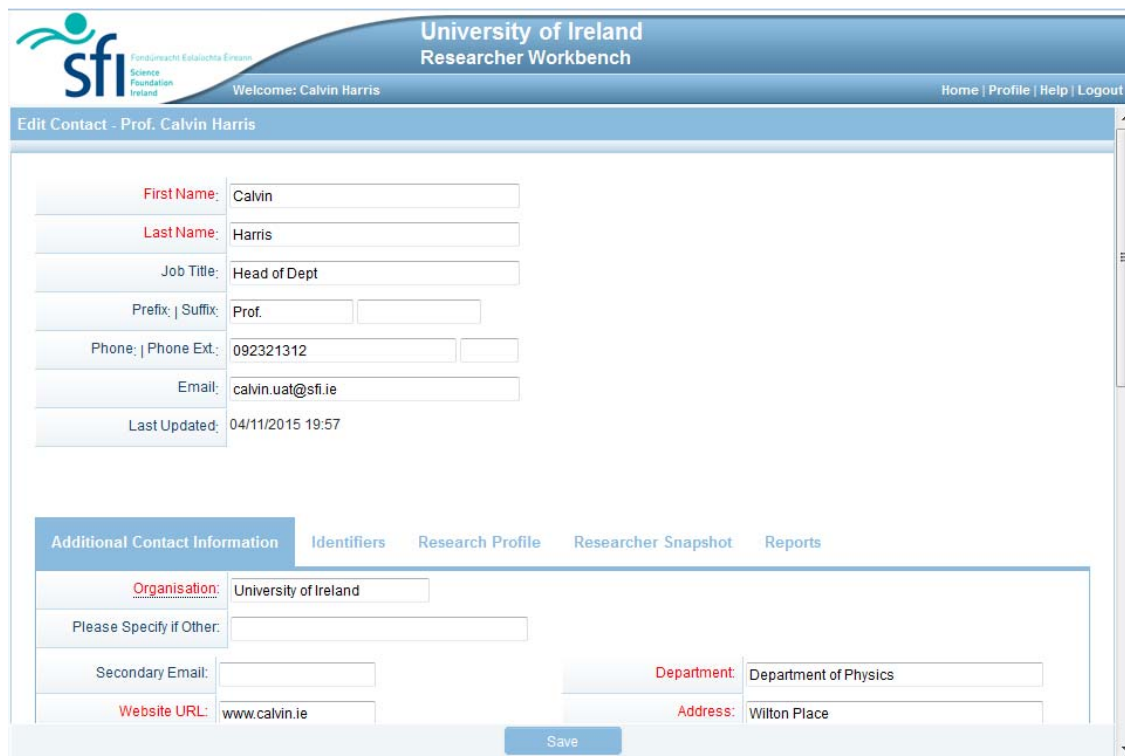
The Researcher Snapshots will be generated from information entered into your profile by you such as your basic contact details, photo and other details completed by you in the Research Profile section. You will be able to fully review and modify your snapshot before submitting to SFI for approval.

### Updating the Researcher Snapshot

1. Log in to SESAME using the instructions in Module 1 and view your Researcher workbench.
2. You can access your profile by clicking on the “Manage Profile” button OR “Profile” button on the top right of your workbench (yellow boxes).



3. The Profile page is displayed.



## 4. Click on the Researcher Snapshot tab

University of Ireland  
Researcher Workbench

Welcome: Calvin Harris

Home | Profile | Help | Logout

Edit Contact - Prof. Calvin Harris

First Name: Calvin

Last Name: Harris

Job Title: Head of Dept

Prefix | Suffix: Prof.

Phone: | Phone Ext.: 092321312

Email: calvin.uat@sfi.ie

Last Updated: 04/11/2015 19:57

Additional Contact Information Identifiers Research Profile **Researcher Snapshot** Reports

Research Programme Description

Source Copy Paste Undo Redo Search Bold Italic Underline Strikethrough Text Color Background Color Font Size Link Unlink Insert Table

Styles Format Arial 12

Save

5. The following text fields will be displayed under this tab:  
 Research Programme Description  
 Expertise  
 Infrastructure  
 Key Highlights and Impacts Arising From Research
6. Complete these fields as required. If you wish to use text formatting please use the formatting tools on each of the fields you are completing. **Please refrain from copying and pasting already formatted text into these fields.**
7. Researchers may also add a figure to their snapshot by uploading a picture in .jpg or .img format to the following field by using the **Upload** button beside "Please upload figure for inclusion in the Researcher Snapshot if appropriate".  
 This figure will appear under your Key Highlights and Impacts Arising from Research section on the completed snapshot.

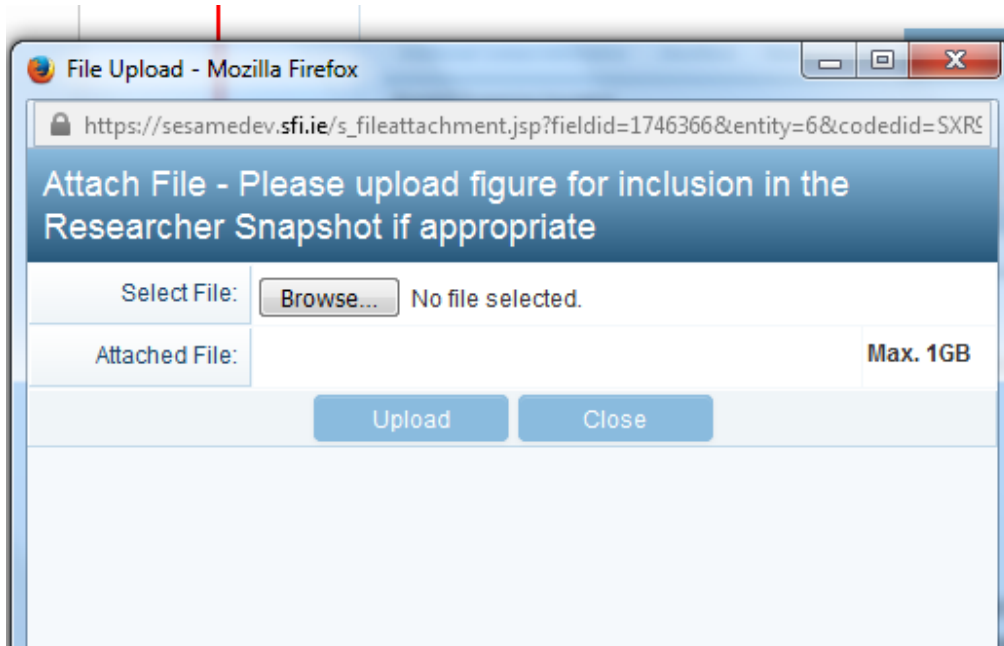
Edit Contact - Prof. Calvin Harris

Please upload figure for inclusion in the Researcher Snapshot if appropriate

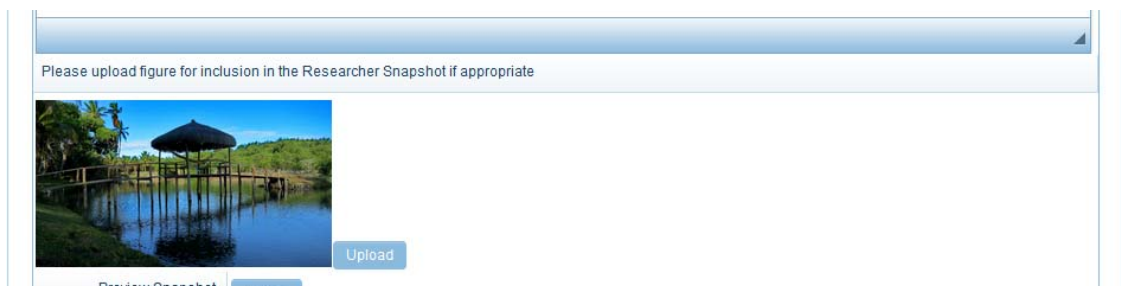
Upload



8. Click on **Upload** below the field and then click on **Browse** to select the file from your hard drive before clicking **Upload** again.



9. By clicking **Save** on the main page, this will display the figure on the page and the snapshot.



10. Should you need to update or delete this figure, click on the **Upload** button beside it and click **Delete** or **Browse** to find another file and follow the steps above.
11. You can also preview your snapshot at any time in the process before submitting by clicking on the **Open** button beside **Preview Snapshot**.

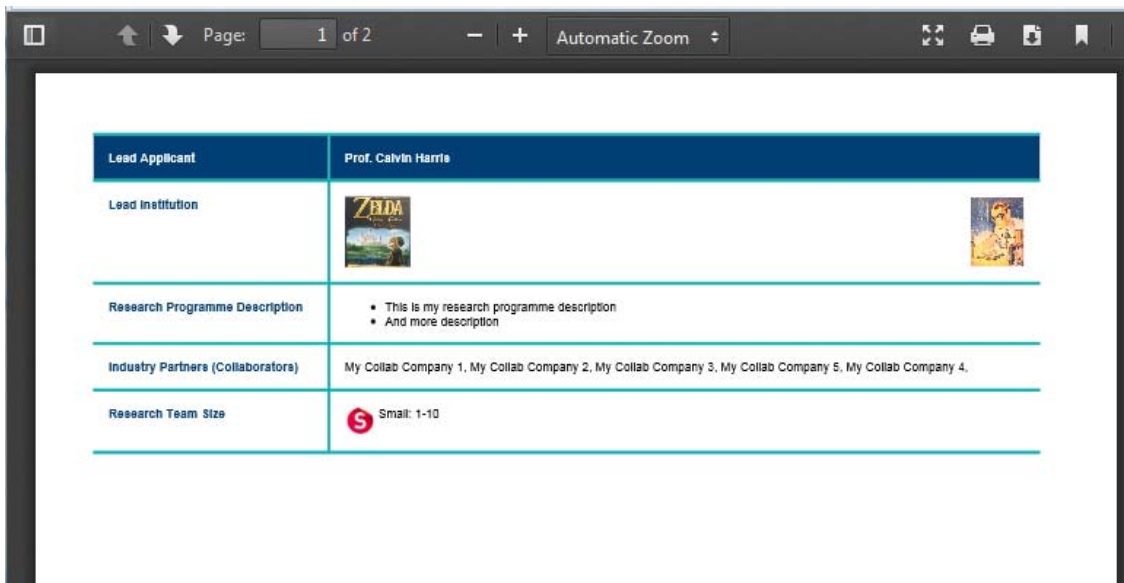


### Previewing and amending the Researcher Snapshot before submission

Your Researcher Snapshot will also pull information from other sections of your Profile and you will need to update and review these sections ahead of submission. You can preview your Researcher Snapshot by clicking on **Open** beside the **Preview Snapshot** section within the Researcher Snapshot tab.



This will open a PDF version of your snapshot. This is only a draft version of your snapshot and can be amended by going into the fields as specified below. After making changes across your profile, click the **Save** button at the bottom of the profile before opening the PDF in the **Preview Snapshot** section.



### Lead Applicant

Your name will be pulled from the Edit Contact section of your Profile. Please ensure this is completed correctly. It will be extracted in the format of Prefix\_First Name\_Last Name

**Edit Contact - Prof. Calvin Harris**

First Name:	<input type="text" value="Calvin"/>
Last Name:	<input type="text" value="Harris"/>
Job Title:	<input type="text" value="Head of Dept"/>
Prefix:   Suffix:	<input type="text" value="Prof."/> <input type="text"/>

### Lead Institution Logo and Researcher Photo

1. The standard logo for your Research Body will appear on the Researcher Snapshot PDF beside the Lead Institution section. This logo will be added by SFI and will appear automatically.

- Under the Identifiers section of your profile you will be able to upload your photo which will display on the completed snapshot. This is detailed in Module 1 of this guide.

### Research Programme Description

This section pulls from the Research Programme Description text section under the Researcher Snapshot tab.

### Industry Partners (Collaborators)

- A list of industry collaborators will automatically be included from the Non Academic Collaborations section of your SESAME Research Profile. If you do not wish for an industry collaborator's name to appear on your public Researcher Snapshot, you must specify this for the relevant industry collaborator in the Non Academic Collaborations section of the Researcher Profile. If on review of your snapshot, you are satisfied that the companies listed are interactions that you may make public, you do not have to take any further steps.
- If you wish to amend visibility of any interactions you have previously included as part of your Research Profile, you can follow the steps below:
  - Navigate to the Research Profile tab of your profile, and show the Non Academic Collaborations section.

Additional Contact Information   Identifiers   **Research Profile**   Researcher Snapshot   Reports

After modifying any of the transactions listed below please click Save button to update Research Profile tab.

<b>Education</b> (5)	Add New	Show
<b>Employment</b> (0)	Add New	Show
<b>Professional Societies</b> (1)	Add New	Show
<b>Significant Distinctions / Awards</b> (1)	Add New	Show
<b>Funding Diversification</b> (4)	Add New	Show
<b>Team Members</b> (4)	Add New	Show
<b>Innovation &amp; Commercialisation Activities</b> (0)	Add New	Show
<b>Publications &amp; Proceedings</b> (28)	ORCID Import	Add New   Show
<b>Presentations</b> (2)	Add New	Show
<b>Academic Collaboration</b> (2)	Add New	Show
<b>Non Academic Collaborations</b> (5)	Add New	Hide

Edit/View	Date Began	Date Ended	Organisation Type	Organisation	Location	Primary Proposal Attribution
Open	27/11/2015		MNC	My Collab Company 1	Ireland	Other SFI award

- Click on Open beside the specific record.

Non Academic Collaborations (5)							Add New	Hide
Edit/View	Date Began	Date Ended	Organisation Type	Organisation	Location	Primary Proposal Attribution		
Open	27/11/2015		MNC	My Collab Company 1	Ireland	Other SFI award		

- This will open the record. After ensuring that all other mandatory fields are completed, go the bottom of the record and review the field "Are you happy to

- share the information on this collaboration externally. Click here for information:”.  
 By clicking on the link you will be able to review how SFI will use this information.
- d. Select Yes and the company name will be automatically added to your snapshot on SESAME. If you select No, the company name will not be added to the snapshot.
3. If you are creating new records for Non Academic Collaborations, follow the steps above and ensure to review each entry to approve that the company name may be used by selecting Yes or No as in step 2(d) above.

**Research Team Size**

1. For each team member you have added under the Research Profile **Team Members** section you will have to confirm if you wish them to be included in your Researcher Snapshot as part of the **Research Team Size**.
2. To include team members on your snapshot please click on the Team Members section on your Research Profile tab.

Additional Contact Information Identifiers **Research Profile** Researcher Snapshot Reports

After modifying any of the transactions listed below please click **Save** button to update **Research Profile** tab.

**Education** (5) Add New Show

**Employment** (0) Add New Show

**Professional Societies** (1) Add New Show

**Significant Distinctions / Awards** (1) Add New Show

**Funding Diversification** (4) Add New Show

**Team Members** (4) Add New Hide

Edit/View	Start Date (with the Team)	Departure Date	Name	Position Within the Team	Current/New Position	Primary Proposal Attribution
<a href="#">Open</a>	2014-01-01		XXXXXX	Co-Principal		XXXXXXXXXXXX

3. Please note: For previously created transactions, you must go into each record and confirm whether the team member should be included or not. To do this please click on Open beside each transaction within Team Members and update the record.

The screenshot shows a web form for adding a team member. The form includes fields for:
 

- Primary Proposal Attribution: Other NON-SFI award
- Secondary Attribution: Other SFI award, Other NON-SFI award
- Position within the Team: Co-Principal Investigators
- Include Team Member in Researcher Snapshot: Yes (highlighted with a red box)
- First Name: test
- Last Name: test
- Gender: Male
- Affiliation of Team Member: Please Select
- Prior Affiliation: (empty)
- Nationality: Ireland
- Highest Degree: (empty)
- Start Date (with the Team): 01/01/2011
- Masters Graduation Date: dd/mm/yyyy
- PhD Graduation Date: dd/mm/yyyy

 On the left sidebar, there are several 'Open' buttons, with the top one highlighted by a red box.

4. If you have selected Yes on the “Include Team Member in Researcher Snapshot” section, this number will be counted and updated on your combined Researcher Snapshot document. This is calculated as you being one team member, and every additional team member is added to this calculation. These will be displayed on the Team Member Size section of the snapshot with the following logic: Small: 1-10; Medium: 11-25; Large: 25+
5. To view this click on the **Open** button beside **Preview Snapshot**.

Research Team Size	<b>S</b> Small: 1-10
--------------------	----------------------

### Expertise

This section pulls from the Expertise text section under the Researcher Snapshot tab.

### Infrastructure

This section pulls from the Infrastructure text section under the Researcher Snapshot tab

### Key Highlights and Impacts Arising from Research

This section pulls from the Key Highlights and Impacts Arising from Research text section under the Researcher Snapshot tab

### Figure

If you have uploaded a figure to the “Please upload figure for inclusion in the Researcher Snapshot if appropriate” section, this will display below the Key Highlights and Impacts Arising from Research section on the PDF

## Contact Details

Your contact details will be automatically pulled from your SESAME profile on to your Researcher Snapshot in the following format:

Name:

Telephone

Email

Web:

Please ensure that these details are correct on the basic contact details and the **Additional Contact Details** before submitting your snapshot.

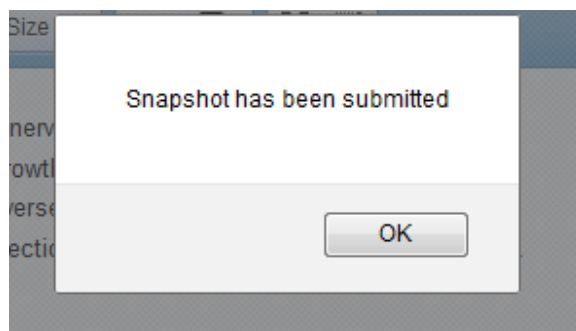
## Submitting your Researcher Snapshot

Once you have completed and reviewed all sections of your Researcher Snapshot, you can then submit the snapshot to SFI for review.

1. Click on the button **Submit to SFI** under the **Researcher Snapshot** tab.



2. You will get a pop up to confirm that the snapshot has been submitted.



3. Please click **Save** to view the history of the submitted snapshot
4. This will show the current snapshot under the **View Current Snapshot** section.
5. SFI will receive notification once you have submitted your snapshot. SFI may request revisions or updates to your snapshot. You will be able to make amendments to your snapshot and resubmit by clicking on the **Submit to SFI** button once gain.
6. Once SFI has approved your snapshot, you will be able to see it under the **View Approved Snapshot** section

View Approved Snapshot			
#	File Name	Size	Date
1.	<a href="#">Snapshot.pdf</a>	669 KB	04/11/2015 19:50

## Module 5: Creating an SFI Application

*Upon completion of this module you will be able to:*

- Review current SFI open calls
- Complete an Eligibility Questionnaire
- Complete an application form
- Upload supporting documents

### Overview of Application Process

The application process is as follows:

- Determine your eligibility to a specific programme through an Eligibility Questionnaire, where applicable.
- Provided you have successfully completed the Eligibility Questionnaire, where applicable, you can create an application for the specific SFI programme call.
- Submit your application to your Research Office for endorsement prior to submission to SFI.

The application is completed in a number of steps.

- **Completion of Field Level data** including text boxes and drop down boxes.
- **Uploading of Related Documents** in PDF format, adhering to page limits.
- **Preparation of Requested Budget** (where applicable. Please see relevant Call Document).
- **Association of Co-Applicants and Collaborators** – if you are applying for funding with co-applicants you will need to associate them with the application and they will gain access to the application. If there are collaborators participating in the application you will need to add their details, but they will not gain access to the application.
- **Submission Process**– once complete, you submit the application to your Research Office for review and endorsement.

You must click “save draft” before you can complete the following:

- Uploading of Related Documents
- Attribution of Research Funding Activities
- Preparation of Request Budget
- Association of Co-Applicants and Collaborators

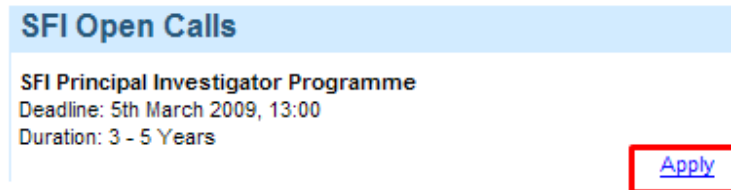
In this module you will review application activities associated with; Completion of Field Level data and Uploading of Related Documents.

Later modules will discuss in detail Preparation of Request Budget, Association of co-applicants and collaborators and the Submission process.

## Reviewing a Programme Call and Completing an Eligibility Questionnaire

All open programme calls are displayed in the top right of the Researcher Workbench.

The Eligibility Questionnaire for each call is accessed by clicking “Apply”.



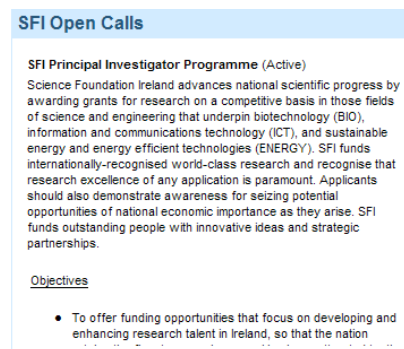
**SFI Open Calls**

**SFI Principal Investigator Programme**  
 Deadline: 5th March 2009, 13:00  
 Duration: 3 - 5 Years

[Apply](#)

Locate the **SFI programme** you may wish to apply to.

1. Click the **Apply** link.
2. Additional details of the programme are displayed.



**SFI Open Calls**

**SFI Principal Investigator Programme (Active)**

Science Foundation Ireland advances national scientific progress by awarding grants for research on a competitive basis in those fields of science and engineering that underpin biotechnology (BIO), information and communications technology (ICT), and sustainable energy and energy efficient technologies (ENERGY). SFI funds internationally-recognised world-class research and recognise that research excellence of any application is paramount. Applicants should also demonstrate awareness for seizing potential opportunities of national economic importance as they arise. SFI funds outstanding people with innovative ideas and strategic partnerships.

Objectives

- To offer funding opportunities that focus on developing and enhancing research talent in Ireland, so that the nation ...

3. Scroll to the **end of the description**.
4. Click the **Apply** button.

[Apply](#)

## Eligibility Questionnaire

The introductory text of the Eligibility Questionnaire is displayed. (Note: not all Programmes or Programme calls will require an Eligibility Questionnaire).

### PI Eligibility Questionnaire

In order to determine whether you and your co-applicants (where applicable) are eligible to apply to Science Foundation Ireland for a Principal Investigator Award, please complete our short Eligibility Questionnaire. Please refer to the Principal Investigator call document ([SFI\\_PI\\_Programme\\_Grant\\_Call\\_IN2\\_2010\\_FINAL.pdf](#)) before completing the questionnaire. You will have five chances to complete the questionnaire.

If all applicants are eligible, a link with further information regarding application submission will be provided. If all applicants are not eligible, you will not be able to submit an application. Please contact [PI@sfi.ie](mailto:PI@sfi.ie) for further information regarding eligibility.

Completion of this Eligibility Questionnaire in no way guarantees that you will be eligible to apply for a grant or that your application will be accepted as all criteria will be verified by SFI on submission of an application.

1. Review the **Eligibility Questionnaire** Introduction.
2. Scroll to the **questions section** of the Questionnaire.



## 5. Answer each of the questions.

Can you confirm that you (and/or your co-applicant(s)) are NOT currently funded by SFI as either Principal Investigator (PI) or co-Principal Investigator (co-PI) under certain SFI programmes. These programmes include SFI PIPICA, SFI PIYRA, SFI SIRG, SFI Research Professorship and SFI Mathematics Initiative.

OR

If you (and/or your co-applicant(s)) are currently funded by SFI as a PI or co-PI, as described above, that you are currently within the last 18 months of your existing grant(s).

Yes  
 No

[Submit](#)

6. Once completed, click the **Submit** button.

If you are eligible then the following message will be displayed and you can now begin to complete the application.

Thank you. You have successfully completed the questionnaire.  
 Please [click here](#) to start the application process

If you are ineligible then the following message will be displayed, and you can choose to retry the Eligibility Questionnaire again or to return to your Home Page.

Your answers would indicate that you are not eligible to apply to the SFI PI Programme, please revisit the eligibility criteria in the PI call document.

Would you like to retry the questionnaire?

Please [click here](#) to retry the questionnaire.

Please [click here](#) to return home.



There may be an imposed limit as to the number of times you can attempt to complete the Eligibility Questionnaire.

Once the limit of unsuccessful attempts is reached, the Researcher is prevented from applying to the Programme.

7. If you have successfully completed the Eligibility Questionnaire then click the **link** to start the **application process**.

The Programme application form is displayed.

The screenshot shows the 'University of Ireland Researcher Workbench' interface. At the top, there is a navigation bar with the SFI logo and the text 'University of Ireland Researcher Workbench'. Below this, a welcome message reads 'Welcome: Gary Cooke' and there are links for 'Home | Profile | Help | Logout'.

The main content area contains 'Guidelines for Preparation of a SFI Investigators Programme Awards Application.' followed by 11 numbered instructions. Below the guidelines is a user profile section for 'Dr. Gary Cooke', listing his role as 'Grant applicant - Principal Investigator (PI) 5' at the 'University of Ireland, Block A, Dublin', with email 'Gary@test.fake;'. It also shows 'Nationality: Argentina' and 'Citizenship: EU' with a 'Modify' button.

Below the profile is a 'Proposal Summary' section with a text input field for 'Proposal Title (max. 30 words):' containing 'Testing the water' and a 'Proposal ID:' field containing '~1386'. A 'Save Draft' button is located at the bottom of this section.

### Saving the Application

If you wish to immediately display all the fields you can:

1. Enter in the **Proposal Title**.
2. Scroll to the bottom of the page.
8. Click the **Save Draft** button.

All the fields and functions will then be available, including the Submit button allowing submission of the application. Until you have saved the application in draft mode, only the proposal title will be visible and available to you.

### Application Save Options

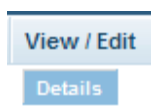
Once you have saved the application, three buttons will be displayed at the bottom of the page – Save Draft, Validate and Submit.

Each of these buttons performs a different function.

- **Save Draft** – saves the application but **no** validation is performed on any value other than a check that the Proposal Title field is populated. You will not be informed if you have not completed other mandatory fields etc.
  - *Using the Save Draft button is useful in the early stages of preparation.*

- **Validate** – saves the application and performs the application validation. You will be informed if there are any mandatory fields that you have not completed or if any other submission criteria have not been met. It is important to note that validation of page length does not occur for multiple upload fields including collaborator CVs, Application documents and Co-applicants CVs. There is also no system-validation on research funding.
  - *Using the Validate is useful in the later stages of preparation when you want to ensure your application is ready for submission.*
- **Submit** – saves the application, performs all the application validations and submits the application to your Research Office for review. If the application fails the validation it will not be submitted for review. The submit button will not be displayed until certain key data is provided.
  - *Using the Submit button is the final step in preparing the application. Once you submit the application you will not be able to edit the application again, unless the Research Office requests revisions.*

The application will remain listed under the applications tab on your workbench but when you click the Details button a read only view of the application will be presented.



### Completion of Field Level Data

- 1) Complete the **field level information** associated with the application – completion of text boxes and selection from drop down lists.

Select One – Select a value from a Drop Down List.	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="color: red; margin: 0;">Research Area - Primary:</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px 0;"> <span style="float: right;">▼</span>       Agriculture     </div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px 0;">       Agriculture        Astronomy        Biochemistry     </div> </div>
Free form test type field. There will generally be a word count limit on these fields.	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="font-size: small; color: gray; margin: 0;">Please provide any additional information of relevance on research funding history (max 100 words).</p> <div style="border: 1px solid #ccc; height: 20px; margin: 2px 0;"></div> <div style="text-align: right; font-size: x-small; color: gray;">100 words left</div> </div>

### Uploading of Application Related Documents

Part of the application process will include the uploading of documents to the application. There are some general SFI rules about documents that are uploaded to support your application.

- Each call will specify which documents are required and the relevant page limit
- The validation as to the number of pages will only take place when you use the Submit or Validate button
- All documents must be in PDF format
- Please ensure to use unencrypted, non-password protected PDFs with the copying function disabled, developed using either Adobe or Microsoft word PDF convertor software **ONLY**.

### Uploading a File to the Application

The basic process for uploading any documents for the application is the same. Use the following steps, which describe how to upload the description of the proposed research project, as a worked example.

1. Locate the **Upload Description** button.

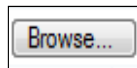
Research Description and Value of the Proposed Research to Ireland (max. 3 pages, including references)

Upload Description

2. Click the button.

The Attach File window is displayed.

3. Click the **Browse** button.



4. Locate the **file** on your computer.

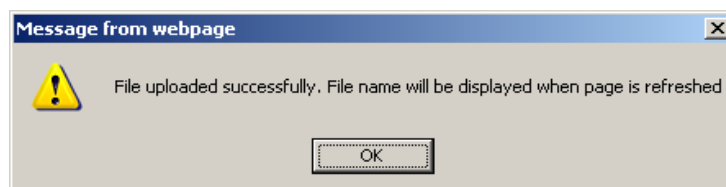
File name:

5. Click the **Open** button.

The document file is displayed in the Select File field.

- a. Click the **Upload** Button.

The file is uploaded and the following message displayed.



- b. Click the **OK** button, close the Attach File window. Click on the Save Draft button – to refresh the screen.

The document is added to the application and the name document is displayed adjacent to the application field.

Brief description of the proposed research (max. 3 pages)

[Research Programme Description.pdf](#)

[Upload Description](#)

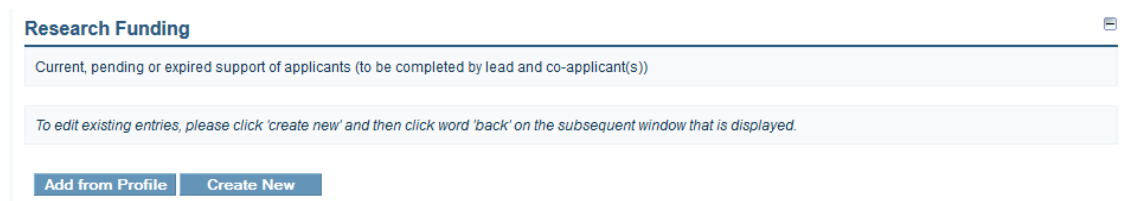
**A similar process will be used for uploading other documents required as part of the application.**

### **Attribution of Research Funding Activities**

Creation of individual research activities in your profile has been detailed in Module 3 of this document. During the application process you can link Research Funding activities from your profile to your application to strengthen the application. You can also create new research funding activities directly from the application form and these will simultaneously be saved to your application and your profile. However, it should be noted that while you are editing the application, other co-applicants (if relevant) will be locked out of the application. Therefore, where a number of new funding records need to be created, it may be more convenient to create them via the profile and link them later to the application.

Use the following steps to link Research Funding activities to your application.

1. Scroll to the **Main Body of Proposal** section and then click on the appropriate button to link your Research Funding activities.



The screenshot shows a section titled "Research Funding" with a sub-header "Current, pending or expired support of applicants (to be completed by lead and co-applicant(s))". Below this is a note: "To edit existing entries, please click 'create new' and then click word 'back' on the subsequent window that is displayed." At the bottom of the section are two buttons: "Add from Profile" and "Create New".

2. If you select the **Add From Profile** button, the Research Funding Attribution list is displayed. This will include all Research Funding details that have previously been entered against your profile.

		Start Date	End Date	Amount of Funding Allocated to PI	Funding Body	Funding Programme	Status
<input checked="" type="checkbox"/>	Open	2011-09-05	2013-08-05	€200,000.00	European Union - Horizon 2020 (ERC)	ERC Starting Grant	Expired
<input checked="" type="checkbox"/>	Open	2013-09-01	2014-09-30	€50,000.00	Enterprise Ireland (EI)	Commercialisation Grant	Current
<input checked="" type="checkbox"/>	Open	2013-10-06	2013-10-08	€12,000.00	European Union - Horizon 2020 (Marie Curie)	Marie Curie IAPP	Current
<input type="checkbox"/>	Open	2013-11-03	2013-11-08	€55.00	European Union - Horizon 2020 (Marie Curie)	hhhhhhhhhh	Expired
<input type="checkbox"/>	Open	2013-11-04	2013-12-04	€1,000,000.00	European Union - Horizon 2020 (ERC)	ERC Starting Grant	Current
<input type="checkbox"/>	Open	2013-11-03	2013-11-06	€1.00	European Union -	nds	Current

For each Research Funding activity that you wish to associate click the check box in the first column.

- When you have selected all the activities, click the **Attribute button** at the bottom of the window and then the Close the window.

- |           |       |
|-----------|-------|
| Attribute | Close |
|-----------|-------|

**This feature is also to be used by all co-applicants to add research funding activities to the application.**

If your application is approved you will use a similar technique to link other research activities to the award as part of your annual report. This will be discussed in the relevant section later in this document.

Alternatively, if you click on the **Create New** button the following screen is displayed.

**New Funding Diversification**

View List
New

<b>Funding held as an Independent PI?:</b>	--Please Select--
<b>Funding Programme:</b>	<input type="text"/>
<b>Funding Body:</b>	<input type="text"/>
<b>Title of Proposal:</b>	<input type="text"/>
Brief description of proposal including website and names of partners, where available. For pending awards, please also indicate expected decision date:	<div style="border: 1px solid #ccc; min-height: 100px;"></div> <div style="text-align: right; font-size: small;">250 words left</div>
<b>Grant No:</b>	<input type="text"/>
<b>Status:</b>	--Please Select--
<b>Total Amount of Funding for the Project (€):</b>	<input type="text"/>
<b>Amount of Funding Allocated to PI (€):</b>	<input type="text"/>
Percentage of the allocated funding that is cash:	<input type="text"/>
<b>Position held on Award :</b>	--Please Select--
Time Commitment (%):	<input type="text"/>
<b>Start Date:</b>	<input type="text" value="dd/mm/yyyy"/>
<b>End Date:</b>	<input type="text" value="dd/mm/yyyy"/>
<b>Headcount:</b>	<input type="text"/>
<b>Created By:</b>	Dane Bowers

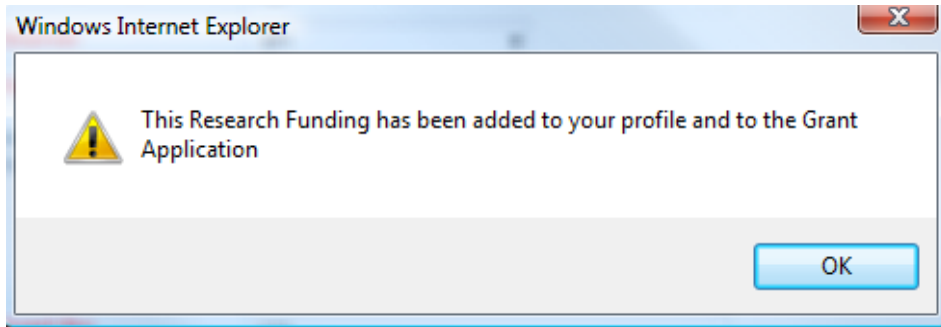
For Census purposes, SFI is only concerned with "Current Funding". Although potentially relevant for other purposes within SESAME such as grant applications and annual grant progress reporting, the inclusion of "Expired" or "Pending" funding, is not required for your year-end census return.

Mandatory fields are marked in red and must be completed if you are to store these new Research Funding details against the current application.

Once you have finished entering these details then click on the **Save** button



You will be presented with a pop-up as shown below. Click OK to proceed.



You should then return to the application. When you subsequently click Save Draft against the application then you will see the associated Research Funding listed in a table against the application.

**Research Funding**

Current, pending or expired support of applicants (to be completed by lead and co-applicant(s))

*To edit existing entries, please click on 'Add from Profile', then open, edit and save the relevant record.*

[Add from Profile](#) [Create New](#)

Funding Diversification							
Current							
Added by	Funding Programme	Title of Proposal	Amount of Funding	% Commitment	Start Date	End Date	Headcount
Ellen Murphy	Commercialisation Grant	Commercialising research	€50,000.00	10	01/09/2013	30/09/2014	2
Ellen Murphy	Marie Curie IAPP	Test	€120,000.00		06/10/2013	08/10/2013	
Expired							
Added by	Funding Programme	Title of Proposal	Amount of Funding	% Commitment	Start Date	End Date	Headcount
Ellen Murphy	ERC Starting Grant	Title of ERC Proposal	€500,000.00	20	05/09/2011	05/08/2013	10

For each current and pending grant listed above, clearly indicate any scientific overlap with this application, referring only to overlap in content (max 600 words)

**Application Specific CV**

A CV must be loaded for each applicant and co-applicant associated with the application. For the Lead Applicant the corresponding Upload field will be clearly labeled as the Lead Applicant CV.

Applicant CV (max 2 pages):

Co-applicants will select the Upload CV button



**Co-Applicants**



Co-Applicants must log in and complete required fields

	Co-Applicant Details	% Commitment	Applying Under ICA criteria	ICA Criteria	Declaration of Co-Applicant	Actions
1	Prof. Researcher2 Leinster University of Leinster  researcher2Len@test.ie					<a href="#">Remove</a> <a href="#">Complete Fields</a> <a href="#">Upload CV</a>

If any of the Co-Applicants are applying under ICA criteria then they should upload their ICA justification documentation below.

[Multiple files...](#)
[Single file...](#)

	<p>At any time while you are completing the application form, you can click on the  button (on the right hand side of the screen –next to each of the section headings) to minimise a section so that it will be easier to navigate through the remaining sections.</p>
--	---

## Module 6: Assigning Co-Applicants and Collaborators

*Upon completion of this module you will be able to:*

Assign Co-Applicants to your application.

Assign Collaborators to your application.

Remove Co-Applicants from your application

Editing and removing Collaborators from your application

### Introduction

You can associate colleagues with your application in one of two roles; as co-applicants or as collaborators.

### Co-Applicant Overview

- A co-applicant applying for funding will receive equal evaluation to the lead applicant and will hold equal accountability for the delivery of the proposed research objectives.
- All issues of eligibility apply equally to the lead applicant and co-applicant
- For the purposes of reviewing and monitoring, a co-applicant receives the same evaluation as the lead applicant and holds equal accountability for the delivery of the proposed research objectives.
- Co-applicants must complete their section (profile, declarations, etc.) before the application can be submitted.
- However, co-applicants cannot submit the application to their Research Office. Submission can only be carried out by the lead applicant.
- Within SESAME, co-applicants must be registered in SESAME by their respective Research Body and maintain a Researcher profile in the system.
- Co-applicants are associated with the application by the lead applicant by use of the co-applicant's SFI PIN number.
- Co-applicants must attach their CV to the application in a similar way as the applicant, although they are uploaded into the specific co-applicant field.
- Research Funding (current and pending support) must be completed by both the lead and co-applicants.

### Co-Applicant SFI PIN Number

Every researcher registered in SESAME receives a SFI PIN number. This unique identifier is used by the lead applicant to reference co-applicants when creating an SFI application.


As lead applicant, you can only associate colleagues to your applications, in the role of co-applicant, if the colleagues have provided their PIN number(s).

Likewise, only colleagues with whom you have shared your PIN number can associate your profile with their applications.

### Collaborator Overview

A collaborator is an individual who is committed to providing a focused contribution for a specific task.

- The collaborator will serve under the direction of the Lead Applicant, and may or may not, receive funding through the award.
- The requirements for collaborators vary from programme to programme but typically they must provide a Letter of Support with the application and this must clearly outline the role of that collaborator in the programme of research proposed (see call document for details).
- Within SESAME, collaborators need not be previously registered by a Research Body and the lead applicant can add collaborators to their application as required.
- Collaborators do not have access to your application within SESAME.

	<p>You can only assign co-applicants and collaborators once you have <u>saved a draft of your application</u>. Until then, the buttons to assign individuals in these roles will not be visible.</p>
--	--

### Assigning Co-Applicants

Use the following process to assign co-applicants.

1. Scroll to the **Co-Applicants** section of the application. Ensure that the section is expanded by clicking on the **+** sign on the right hand side of the screen (if necessary).



2. Click the button labelled **Add** adjacent to the **Add Co-Applicants** text.



The Assign Co-Applicant page is displayed.



1. You will use assignment screen to add each co-applicant.
2. In order to add a co-applicant you must have available the SFI PIN number of each co-applicant and their last name.
3. If either the PIN number or Researcher Last Name is incorrect you will not be able to assign the co-applicant.

In these circumstances you should contact the co-applicant directly to confirm these details.

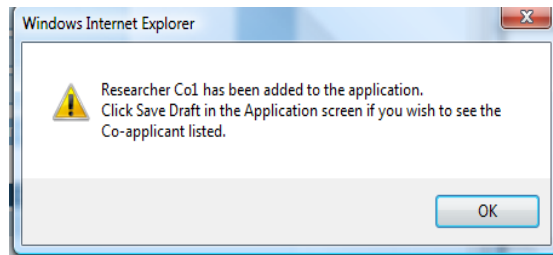
If the co-applicant is not registered with SESAME then they will need to register through their respective Research Body before you can proceed.

- Enter a valid **SFI PIN number** and **Researcher Last Name**.

- Click the **Retrieve Researcher** button.

The Researcher details will be displayed.

- If you are satisfied this is the correct person, then click on the **Associate Researcher with Application** button and repeat the above steps for each co-applicant to be associated.
- The resulting pop-up will inform you that the Researcher has been added and that you must click Save Draft to have the co-Applicant listed against the application.



- Click OK.
- Click the Close button.

Once you have clicked the **Save Draft** button the page is refreshed and the co-applicant will be listed.

**Co-Applicants** ☰

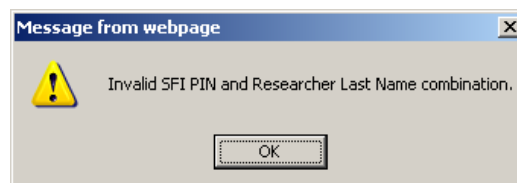
Co-Applicants must log in and complete required fields

	Co-Applicant Details	% Commitment	Applying Under ICA criteria	ICA Criteria	Declaration of Co-Applicant	Actions
1	Prof. Researcher2 Leinster University of Leinster  researcher2Len@test.ie					<a href="#">Remove</a> <a href="#">Complete Fields</a> <a href="#">Upload CV</a>

If any of the Co-Applicants are applying under ICA criteria then they should upload their ICA justification documentation below.

[Multiple files...](#)
[Single file...](#)

If the Co-applicant does not exist in SESAME or the PIN or Last name is incorrect the following message will be displayed.



### Email Alert to Co-Applicant

Once you assign a co-applicant to an application, the system will:

- Send an email to the co-applicant providing them with login instructions. An example of this email is included below.

Dear Prof xyz

You have been assigned as a Co-Applicant to the following proposal:

Proposal ID: 11/PI/1875  
 Proposal Title: Title of application  
 Lead Applicant: M Murphy  
 Research Body: University of Ireland

Please log into <https://grants.sfi.ie> to view details.

Regards,

Science Foundation Ireland

### Co-Applicant Activity

The co-applicant must log in to SESAME and provide information within the application on their specific involvement (e.g. % Commitment) by clicking on the **Complete Fields** button. They must also add details of their research funding to an application.

The co-applicant must complete the following steps:

1. Open the application from the application list.
2. Scroll to the Co-Applicants section and click on the Complete Fields button.

#### Co-Applicants



Co-Applicants must log in and complete required fields

	Co-Applicant Details	% Commitment	Applying Under ICA criteria	ICA Criteria	Declaration of Co-Applicant	Actions
1	Prof. Researcher2 Leinster University of Leinster  researcher2Len@test.ie					<a href="#">Remove</a> <a href="#">Complete Fields</a> <a href="#">Upload CV</a>

If any of the Co-Applicants are applying under ICA criteria then they should upload their ICA justification documentation below.

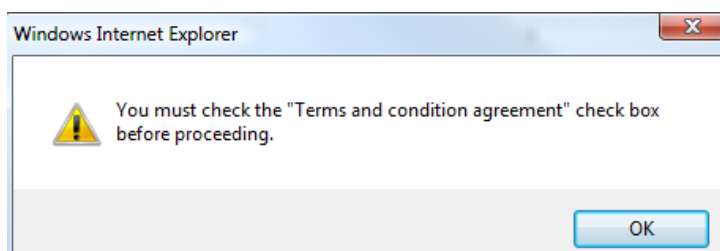
[Multiple files...](#)

[Single file...](#)

The screenshot shows a web form titled "Co-applicant Details. This section is to be completed by the co-applicant". The form contains the following fields:

- % Commitment:** A text input field.
- Applying Under PICA Criteria?:** A dropdown menu with "Select One" selected.
- Please provide your history of supervision:**
  - Masters students graduated:** A text input field.
  - PhD student graduated:** A text input field.
  - Masters students currently supervising:** A text input field.
  - Phd students currently supervising:** A text input field.
  - Other Staff being supervised:** A text input field.
- Please provide a summary of your publications to date:**
  - Senior Author Publications:** A text input field.
  - Journal Articles:** A text input field.
  - Reviews:** A text input field.
  - Book Chapters:** A text input field.
  - Books:** A text input field.
  - Conference Publications:** A text input field.
  - Other:** A text input field.

3. The fields in red are mandatory and must be completed. Failure to complete any of these fields will result in an appropriately worded pop-up appearing, requesting that the missing information is entered.
4. The co-applicant must also indicate that they accept the terms and conditions by checking the corresponding box at the bottom of the screen. Failure to do so will result in the following pop-up appearing.



5. The co-applicant must also add details of their current and pending support to the application.

**Research Funding** ☰

Current, pending or expired support of applicants (to be completed by lead and co-applicant(s))

*To edit existing entries, please click 'create new' and then click word 'back' on the subsequent window that is displayed.*

[Add from Profile](#) [Create New](#)

## Assigning Collaborators

Use the following process to assign collaborators.

1. Open the **application** from the **application list**.
  - Scroll to the **Addition of Collaborator(s) where applicable** section of the application.

Assign Collaborators: [Add](#)

- Adjacent to the **Assign Collaborators field**, click on the **Add** button.

The Assign Collaborator page is displayed.

Assign Collaborator

<b>Organisation</b>	<input type="text"/>
<b>Department</b>	<input type="text"/>
<b>Prefix</b>	<input type="text" value="Select One"/>
<b>First Name</b>	<input type="text"/>
<b>Last Name</b>	<input type="text"/>
<b>Job Title</b>	<input type="text"/>
<b>Collaborator Type</b>	<input type="text" value="Select One"/>
<b>Email</b>	<input type="text"/>
<b>Address 1</b>	<input type="text"/>
<b>Address 2</b>	<input type="text"/>
<b>City</b>	<input type="text"/>
<b>Country</b>	<input type="text" value="Please Select"/>
<b>Postal Code</b>	<input type="text"/>

[Associate Collaborator](#)

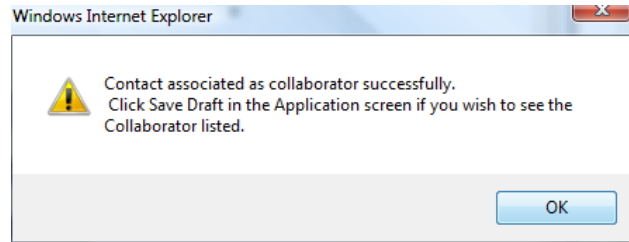
[Clear Fields](#)

[Close](#)

2. You will use this screen to add each collaborator.
3. The organisation, department, prefix, first name, last name, email, and country are required fields.
  - Enter the **collaborator** details.
  - Click the **Associate Collaborator** button.

The collaborator is added to your application and the following message displayed.





- Click the **OK** button.

If you need to add additional collaborators you can click the **Clear Fields** button and enter the next collaborator details.

- When complete click the **Close** button.

Once you have clicked **Save Draft** then the page is refreshed the collaborator will be listed.

**Collaborators** ☰

Name	Organisation	Email			
Prof. John Doe	University of Ireland	john@test.fake	<b>Remove</b>	<b>Upload CV</b>	<b>Edit</b>

4. Unlike Co-applicants, no email is sent to the collaborator and no access is granted to the system.
5. The collaborator’s CV and related information (including the Letter of Support) will be uploaded to SESAME by the lead or co-applicants (where applicable. Please see relevant Call Document).

### Removing Co-Applicants or Collaborators

In addition to adding co-applicants and collaborators to your application, it is also possible to remove these individuals subsequently.

When a co-applicant is added to an application, a **Remove** button is displayed adjacent to each of the records within the **Co-Applicants** section.

**Co-Applicants** ☰

	Co-Applicant Details	% Commitment	Applying Under PICA criteria	PICA Criteria	Declaration of Co-Applicant	Actions
1	Test Researcher2 Athlone Institute of Technology (AIT)  researcher2@live.ie					<b>Remove</b>  <b>Complete Fields</b>

Co-Applicant(s) CV (7 page max.)

**Multiple files...** **Single file...**

When a collaborator is added to an application, a **Remove** button is displayed adjacent to each of the records within the **Collaborator** section.

**Collaborators**

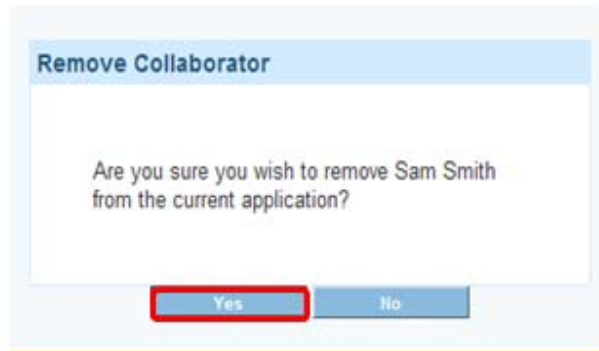
Name	Organisation	Email	
Prof. John Doe	University of Ireland	john@test.fake	<input type="button" value="Remove"/> <input type="button" value="Upload CV"/> <input type="button" value="Edit"/>

- To remove a co-applicant or collaborator, click the **Remove** button to the right of the record to be removed.

**Collaborators**

Name	Organisation	Email	
Prof. John Doe	University of Ireland	john@test.fake	<input type="button" value="Remove"/> <input type="button" value="Upload CV"/> <input type="button" value="Edit"/>

- Click the **Yes** button on the popup.



The co-applicant or collaborator will be disassociated from the application.

Note: a lead applicant can remove a co-applicant and a co-applicant can remove themselves from the application. However, a co-applicant cannot remove the lead applicant, another co-applicant or a collaborator from an application.

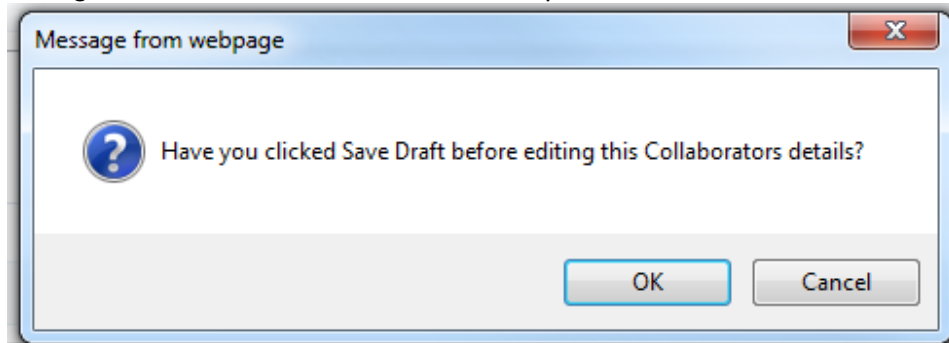
	<p>Removing a co-applicant / collaborator from the application does not remove any documentation associated with them (for example a CV) that you have uploaded, so remember to also remove this from the application.</p>
--	--

**Editing collaborator details**

- If you have entered some collaborator details in error, you may edit the record. To do this click on **Edit** against the collaborator record to be changed.

Name	Organisation	Email	
Prof. John Doe	University of Ireland	john@test.fake	<input type="button" value="Remove"/> <input type="button" value="Upload CV"/> <input type="button" value="Edit"/>

2. A warning message will display warning the user that they must click **Save Draft** before editing the collaborator record. Click **Cancel** if you wish to **Save Draft**.



3. Click OK if you have saved the record. New window opens with the collaborator details. Edit the required details and click on **Save**.

Edit Contact - Olga Vertongen

<b>First Name:</b>	<input type="text" value="Olga"/>
<b>Last Name:</b>	<input type="text" value="Vertongen"/>
<b>Job Title:</b>	<input type="text" value="Research Lead"/>
<b>Prefix / Suffix:</b>	Dr. <input type="text"/> <input type="text"/>
<b>Phone:</b>	<input type="text"/> <input type="text"/> <input type="text"/>
<b>Phone Ext.:</b>	<input type="text"/>
<b>Email:</b>	<input type="text" value="olga.vertongen@test.fake"/>
<b>Last Updated</b>	22 August 2013 9:40AM
<b>Updated By</b>	Andrew Kellett

Additional Information

<b>OrcidID:</b>	<input type="text"/>
<b>Research interests:</b>	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
<b>Address 1:</b>	<input type="text" value="78 Helsbrau St"/>
<b>Address 2:</b>	<input type="text"/>
<b>City:</b>	<input type="text" value="Arnhem"/>
<b>Country:</b>	<input type="text" value="Netherlands"/>
<b>Postal Code:</b>	<input type="text"/>
<b>Organisation:</b>	<input type="text" value="BC Cancer Agency"/>
<b>Collaborator Type:</b>	<input type="text" value="Academic"/>
<b>Department:</b>	<input type="text" value="Research"/>

4. Click on the Home button to bring you back to the homepage.
5. Click on the Details button to enter the application once again and click on **Save Draft** to view any changes made to the record.

## Module 7: Preparation of the Application Request Budget

*Upon completion of this module you will be able to:*

Describe the different SFI budget types.

Create a Request Budget.

### SFI Budgets – Overview

You will encounter a number of different types of application and award budgets when using SESAME. However, these budget types can be categorised into one of two primary styles: notional and calendar budgets.

Initially you will create your budget based on the number of years required for the project, this is known as a notional budget. The budget column headings will refer to year 1, year 2, etc.

Once the proposal is offered subject to revisions, the applicant is required to prepare a calendar budget based on the actual years during which the project will take place. The budget column headings will refer to 2011, 2012, etc.

### Requested Budget

The request budget works as follows:

1. The Requested Budget is prepared online and submitted with the rest of the application ( this is dependent on the application stage – please consult the relevant call document) and outlines the requested funds for the project.
2. The layout of the budget is predefined by SFI in order to provide consistency across all applications and to help ensure that budget items are categorised correctly.
3. You can modify the requested budget at any time prior to submission as long as it is in a status of Draft. To do this simply click the **Save** button each time you amend / add to the budget until you are satisfied with the overall content.
4. You can continue to modify the budget details until you submit the overall application for Research Body approval.
5. If, during the review of the overall application, the Research Office requests changes you can further modify the budget and resubmit to the Research Body.
6. If SFI request revisions to the budget during the Full Proposal – Offered Subject to Revisions stage you can once again modify the budget and resubmit to the Research Body.

### Award Budget

If your application is approved by SFI and you accept the award, you can create the applicant pre award budget, and specify a start date, from which an annual budget will be generated and used for the Letter of Offer.

### Post Award Budgets

1. During the life of the award you can request a budget reallocation / no cost extension within SFI policy guidelines.
2. Post award budgets will be discussed in a later module.

**Creating a Requested Budget**

To create a Requested Budget , use the following steps.

1. Click on the **Open** button in the Budget section of the proposal form.

**Budget**

Prepare Budget: **Open** *For guidelines on how to complete your budget please click [here](#)*

2. As this is the first time that a budget has been prepared for this application, the following screen will be displayed.

Budget History						
Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet	
No budgets available. Please click <a href="#">here</a> to create a budget.						
To view budget details, please select an existing record.						

3. Click on the ‘here’ link to view the budget history screen and in the resulting screen, click on the **Open Budget** button adjacent to the **Requested** budget type. (When revisiting this screen ensure that the radio button beside the **Requested** budget is checked).

Budget History						
Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet	
<input checked="" type="radio"/> Requested	Draft	Calvin Researcher	06/02/2012 12:32	06/02/2012 12:32:57	<b>Open Budget</b>	

The **Requested** budget is displayed.

REQUESTED BUDGET						
<b>0</b> (IN EUROS)						
LAST MODIFIED: 06/11/2012 15:44						
APPLICATION START DATE: 06/11/2012						
LEAD APPLICANT: DAVINA MCCALL						
PROPOSAL ID: 12/IP/1812						
RESEARCH BODY REF:						
EXPORT AS PDF: <input type="button" value="Open"/>						
CATEGORY	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
Staff	0	0	0	0	0	0
Equipment	0	0	0	0	0	0
Materials	0	0	0	0	0	0
Travel	0	0	0	0	0	0
Direct Costs	0	0	0	0	0	0
STAFF						
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
Total	0	0	0	0	0	0
<input type="button" value="+"/>						
EQUIPMENT						
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
Total	0	0	0	0	0	0
<input type="button" value="+"/>						

The budget sheet is organised into sections as follows:

4. **Requested Budget (IN EUROS)** – this value represents the total amount requested and is calculated from the values you enter.
5. **Summary Budget** – this section represents the amounts required by category over the requested term of the project.
6. **Staff, Equipment, Materials and Consumables and Travel** – these sections represent the four allowable categories of expense in the budget.

The following buttons are available when working with the budget sheet.



**Add a New Row**



**Delete Current Row**

- Clicking the **Add** Row button will add a new row to the relevant category.
- Clicking the **Delete** Row button will remove an existing row from the relevant category.

The budget is separated into four categories:

- Staff Expenses
- Equipment Expenses
- Materials and Consumables Expenses
- Travel Expenses

### Adding Staff Budget Records

Before adding staff budget records, please note:

- SFI makes a contribution to the overall salary budget for the programme. Please *note* that the submission of an application by the host research body must only take place once salaries requested have been approved and justified.
- Some SFI grants do not fund the core salary or benefits of either the lead or co-principal investigator. Contributions to team-member salaries and fees and stipends for postgraduate students may be requested. **Refer to relevant call document for allowable eligible costs.**

Click the **Add Row** button for the **Staff** category.



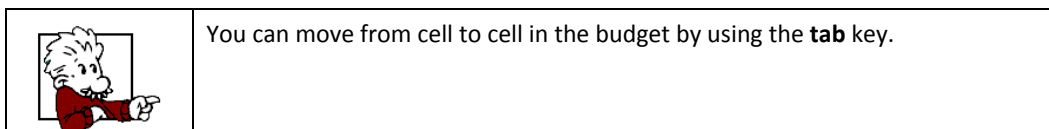
A new row is added.

A NEW ROW IS ADDED.

EQUIPMENT					
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL
PC	5000	5000	0	0	10000
Total	5000	5000	0	0	10000

The staff section of the budget provides for freetext descriptions of the classes of staff that can be attached.

Details are provided in the SFI Grant Applications Budget Policy (GABP)



Complete the **Staff** section as required.



STAFF						
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
New Post-Doctoral Reser:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Total	0	0	0	0	0	0

As you enter data the summary section and total budget are updated.

REQUESTED BUDGET						
						<b>3600.00</b> (IN EUROS)
LAST MODIFIED: 06/11/2012 15:44						
APPLICATION START DATE: 06/11/2012						
LEAD APPLICANT: DAVINA MCCALL						
PROPOSAL ID: 12/IP/1812						
RESEARCH BODY REF:						
EXPORT AS PDF: <a href="#">Open</a>						
CATEGORY	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
Staff	1800.00	1800.00	0	0	0	3600.00
Equipment	0	0	0	0	0	0
Materials	0	0	0	0	0	0
Travel	0	0	0	0	0	0
Direct Costs	1800.00	1800.00	0	0	0	3600.00

### Adding Equipment Budget Records

Before adding equipment budget records, please note:

- Details of all requested equipment necessary for the research programme should be itemised. Small equipment, of a value of **less than €2,000**, should be included in the materials and consumables section.
- The exception to this is for computers/laptops, which should always be listed in the equipment section regardless of cost.
- For an equipment item in excess of €50,000, the quote number and cost must be included in the budget justification section. The documentation supporting this quotation must be fully auditable and any supporting documentation, in addition to the budget justification document, must be available to SFI on request. Please refer to the relevant call document for full details.

Complete the **Equipment** section, adding rows, as required.

EQUIPMENT						
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL	
PC	5000	5000	0	0	10000	-
Other Equipment	50000	0	0	0	50000	-
<b>Total</b>	<b>55000</b>	<b>5000</b>	<b>0</b>	<b>0</b>	<b>60000</b>	

### Adding Materials and Consumables Budget Records

Before adding material and consumables budget records, please note:

- An outline of all materials and consumables that will be used in the course of the research programme should be entered into this section.
- *Note* these may include access to facilities and services not available in the host research body, such as the costs associated with accessing international databases or commissioning specific experiments in other laboratories.

Complete the **Materials and Consumables** section, adding rows, as required.

MATERIALS AND CONSUMABLES						
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL	
Supplies	200	200	2000	200	2600	-
<b>Total</b>	<b>200</b>	<b>200</b>	<b>2000</b>	<b>200</b>	<b>2600</b>	

### Adding Travel Budget Records

Before adding travel budget records, please note:

- Only travel costs for journeys directly related to the progress of the research programme may be requested as a direct cost on the research grant.
- The budget justification should outline the details of travel expenses directly related to conferences, scientific collaboration on the research programme, or learning special research techniques and should indicate the number of team members participating in each event.
- Where possible, supply the conference name and location.
- In the case of working visits, the rates sought for subsistence and other allowances may be no more than those which the Research Body's permanent staff may claim.

Complete the **Travel** section, adding rows, as required.

TRAVEL					
DESCRIPTION	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL
Conference	500	0	0	5440	5940
Total	500	0	0	5440	5940

**Saving the Budget**

Once complete, you must save the budget.

1. Click the **Save** button.



The request budget is saved and associated with your application with a status of draft.

2. Click the **Close** button.



You are returned to the **Budget History** screen

The **Requested** budget does not have to be completed in a single session and will be saved in this draft form until the application is submitted to the Research Body for approval.

In conjunction with this completed Requested budget, the field level data, and supporting documentation, the application is now ready for submission to the Research Body for endorsement.

## Module 8: Submitting your Application

*Upon completion of this module you will be able to:*

Determine if your application is complete and ready for submission.

Submit your application to the Research Office for review.

Respond to any Research Office review requests.

Review feedback from reviewers

Provide response to reviewer feedback

### Introduction

Once you are satisfied that your application is complete you can submit your application to your Research Office for review.

The following rules and logic exist around the submission process.

- Only the lead applicant can submit the application. The Submit button will not be available on the application form to any co-applicant.
- When a call deadline is reached, the Submit button will no longer be available and therefore submission of the application will not be possible.
- If the deadline passes while the lead applicant is accessing and updating the application, then when they click Submit then they will be presented with an appropriately worded pop-up message and, after this point, the Submit button will no longer be available for the lead applicant.
- When the application is submitted all validation rules are applied to the application and the application will not be submitted if any of these validations fail. You will be prompted as to each validation issue.

Remember, you can check the validation status of the application by clicking the **Validate** button at any time before submission. If you know that the application will fail validation, but wish to save your work to that point in time, click the **Save Draft** button, which will not validate or submit the application but will save the current application information.

- Validation will also automatically occur when "Submit" is selected. However, it is important to note that there is no system validation on multiple upload file fields, application documents and letters of support, where required. The number of documents required may vary depending on each application. There is also no system validation on the addition of funding support.
- Once submitted and reviewed, there may be feedback from the Research Body that will require you to modify the application.
- Once the Research Body has endorsed the application it will become visible to SFI staff and the SFI review process will commence.
- There may be feedback from the SFI review processes that will require your involvement. You will be notified at the appropriate time.

### Submission Checklist

**Before submitting the application you should review the check lists included within the Call documentation.** Applications at Pre-Proposal and Full Proposal statuses will have different requirements.

Below are sample questions, but there may be specific submission requirements for particular programme calls.

- **Are all mandatory fields complete?** – You will NOT be prompted for mandatory fields if you have only used the Save Draft feature.
- **Have all the required documents been uploaded?**
- **Are any Co-applicant(s) linked to the application?**
- **Have you and each of the co-applicants uploaded their CVs?**
- **Have you and each of the co-applicants uploaded any other required documentation?**
- **Are any Collaborators linked to the application?**
- **Has required documentation been uploaded for every collaborator linked to the application?**
- **Has the Requested Budget been completed?**
- **Have any required declarations been checked off?**

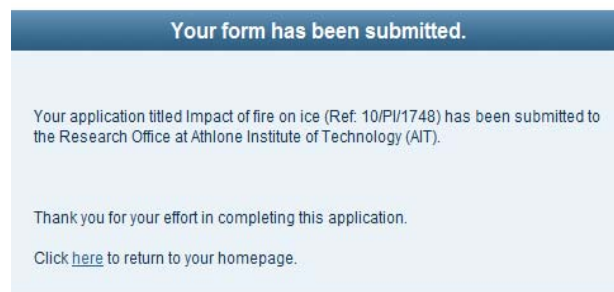
### Submitting the Application

Once you are satisfied that the application is complete you can submit.

1. Scroll to the **bottom** of the **application** form.
2. Click the **Submit** or **Submit for RO Review** button.

A rectangular button with a blue gradient background and a thin red border at the bottom. The word "Submit" is centered in white text.

If there are no validation issues, the application is submitted to the research office for review, at both the pre and full proposal stages, and the following page displayed.



3. Click the **Home** button to return to the **Research Workbench**.

The application is listed at the bottom of the screen with the status of (full or pre proposal) Pending RO approval.

Current Applications		Active Awards	Non-Active Awards			
Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit
12/IA/1775	Aoibh testing email address change	Investigator Programme - Investigator Award	Full Proposal - Under Review	15/05/2012 14:53:50	Lead Applicant	<a href="#">Details</a>

### Research Body Process Overview

Once you have submitted your application to the research office no further action unless the research office request revisions.

The Research Office has three options.

- **Endorse** – approves the Application from a research office perspective and makes the application visible to SFI staff.
- **Request Revision** – returns the application to a status of **In Preparation** with relevant notes allowing you and your co-applicants to further modify and resubmit the application to the research body, once the deadline has not passed.
- **Decline Proposal** – moves the application to a **Declined** status. The application will not be submitted to SFI and you cannot make any further modifications.

You will be informed by email that the application status has been reviewed, and you can log in to SESAME in order to determine the status of the application and any notes regarding the review process.

- If the application has been endorsed then no further action is required until instructed by SFI.
- If revisions are required then you can log into the Researcher Workbench and make appropriate changes. The Requested budget will have been assigned a status of Requires Revisions, which will allow for any updates or amendments to be made as requested.
- If the application is declined then no further action is required.

## **Module 9: Submitting an Applicant Response**

*Upon completion of this module you will be able to:*

Accessing Review Feedback

Submit a response to Review Feedback

**Accessing Review Feedback**

During the review process, SFI will release Review Feedback to Applicants on the SESAME workbench. Applicants can then respond to Review Feedback within a specified timeline on the SESAME workbench.

Please note that the Review Feedback button will only display from the time specified by SFI (usually agreed with the Applicant beforehand). You will only be able to submit your feedback within the specified time. After you have submitted your feedback, it will remain visible against your application for the lifetime of the application.

Follow these instructions to access and respond to review feedback.

1. Log into the **SESAME Researcher Workbench**.  
Your application will be listed under the **Current Applications** tab.
2. Click on the Details button for your Application which is **Under Review**

Current Applications							Active Awards	Non-Active Awards
Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit		
12/IP/1225	barbara test	Investigator Programme - Investigator Project	Full Proposal - Under Review	09/12/2011 14:53:16	Lead Applicant	<b>Details</b>		

3. This will open a Web Page View of your application. At the top of this page you will see the button **Review Feedback**.

The screenshot shows the 'Investigator Programme - Investigator Project Full Proposal' page. At the top, there are navigation links for 'Home | Profile | Help | Logout' and a welcome message for 'Davina McCall'. Below this, there are 'Print' and 'Export as PDF' buttons. The main content area features logos for the National Development Plan (NDP) and the European Union, alongside the SFI logo. A 'Review Feedback' button is highlighted with a red box. Below the button is a table of application details:

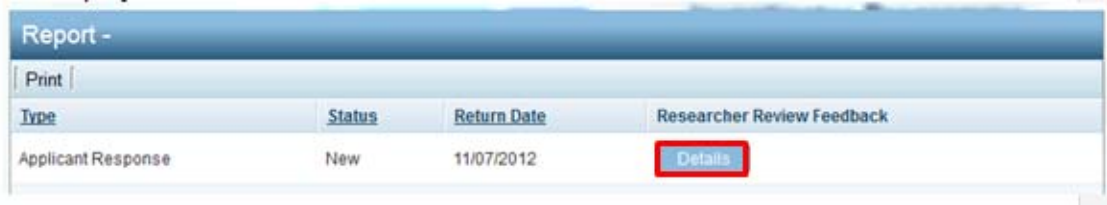
Proposal Title	barbara test
Proposal ID	12/IP/1225
Research Body	University of Ireland
Requested Budget	€31,318.00
Requested Duration	50 months

Below the application details is the 'Applicant Details' section, which includes the following information:

Name	Prof. Davina McCall
Department	-
Research Body	Aarhus University
Address	Block P dublin Ireland 22
E-mail	Davina.UAT@sfi.ie
% Commitment to Project	56
Year Ph.D. (or equiv)	1990
Gender	Female



- Click on the **Review Feedback** button to open the **Review Feedback** window. This will display the Return Date.



- Click on the Details button to open the **Applicant Response** window.



- The Applicant Response window will open. From the **Applicant Review Feedback Documents:** section you may open any **Review Feedback** sent by SFI.



**Submit a response to Review Feedback**

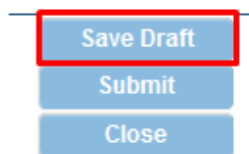
- The Applicant may then complete their response by completing the 1600 word text box by typing straight into the text box. The word count will count down the words as they are typed.

Applicant Feedback  
Please provide a response to the reviewers' comments below (max of 1000 words)  
Please submit this response prior to 17:00 11/07/2012

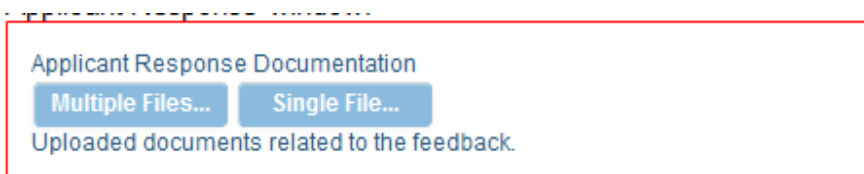
1579 words left

This is my response to Reviewer 1  
This is my response to Reviewer 2  
This is my response to Reviewer 3

2. As you are completing your response, please ensure to click **Save Draft** to save your work.



3. You may partially complete your response, click the **Close** button and return by clicking **Review Feedback** as in step 3 onwards.
4. **If you are copying text from another source, please ensure to use only True Type Font and NO symbols or bullet points.**
5. SFI guidelines may also allow for submission of an attachment with the applicant response. **Please ensure to consult with the programme team over your application regarding guidelines for completing your response.**
6. An attachment may be uploaded by using the upload buttons at the bottom of the Applicant Response window.



7. Click on **Single File or Multiple Files....** buttons and search for the file you wish to upload. **Browse** for the file, click **Upload** and then close this window.

The screenshot displays a 'File Upload' window. At the top, there is a header bar with the text 'File Upload'. Below the header, on the left, is a 'Select File:' label followed by an empty text input field. To the right of the input field are two buttons: 'Browse...' and 'Upload'. Below this is a table with the following structure:

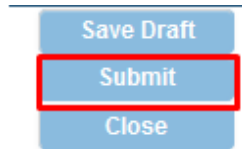
<input type="checkbox"/>	#	File Name	Size	Date
<input type="checkbox"/>	1.	<a href="#">Review Feedback Response.pdf</a>	48 KB	11/07/2012 16:08

Below the table, there is a 'Delete' button. The rest of the window is a large, empty light blue area.

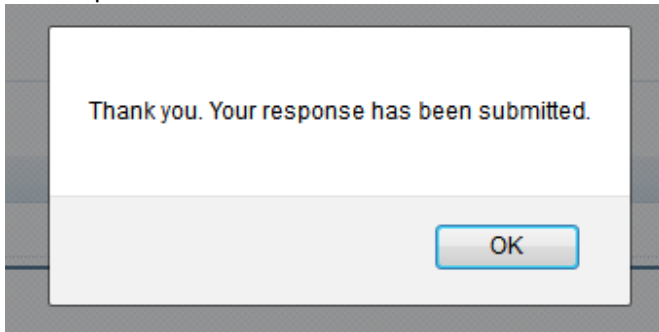
- Click Save Draft to displays the attached document on the Applicant Response window.



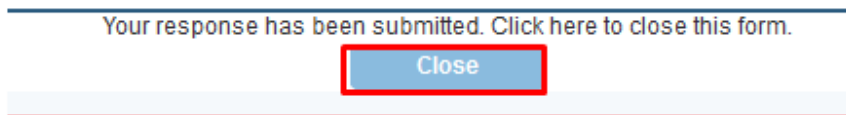
- Once you have completed your response and uploaded any necessary documents, you may then click the **Submit** button to submit your response to SFI.



Please note that you cannot submit your response after the Return Time and Return Date have expired.



- Once you have submitted the response, you will no longer be able to edit this page. Please click the Close button to close the page.



- You will be able to review your response to feedback by clicking on the Review Feedback button and the Details button as before.

## **Module 10: Managing the Award Process**

*Upon completion of this module you will be able to:*

Update your request budget based on SFI conditions

Submit the Revised budget for approval

Upload your revised workplan and budget justification based on SFI conditions.

**Update Requested budget based on revision requests**

If the Research Body or SFI has requested revisions to your budget and you wish to proceed with the award process, you need to modify your requested budget to meet any changes outlined.

Follow these instructions to create a revised budget.

1. Log into the **SESAME Researcher Workbench**.

Your application will be listed under the **Current Applications** tab.

2. If the Research Body has requested revisions to the Requested Budget then the status of the application should have been changed back to Full Proposal – In Preparation and any modifications requested should be visible along the top of the application after they click on the Details button.

Your Research Body has Requested the Following Revisions

More money required for Staff and Materials

**Mr. New Reviewer**

Title  
The Simmons Arthritis Reseearch Centre  
ghghgh  
hjhj  
new@review.ie;

Nationality: Ireland  
Citizenship: Non EU

[Modify](#)

Save Draft
Validate
Submit for RO Review

3. Scroll to the Budgets section at the bottom of the Application and click on the **Open** button adjacent to the **Prepare Budget** field to access the Budget History.

## Budget

Prepare Budget:

Open

4. The Requested Budget will exist with a status of Requires Revision

Budget History						
	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Requested	Requires Revision	New Reviewer	27/10/2010 15:00	27/10/2010 20:02:11	<a href="#">Open Budget</a>

You can edit the Requested budget by clicking on the Open Budget button across from this budget.

You will be presented with the same Budget entry screen as shown in Module 6, and will follow the same process to Save the budget details.

Enter or update the Staff, Equipment, Materials and Consumables, and Travel costs.

Click the **Save** button.



The revised Requested budget is saved but remains associated with your application with a status of Requires Revision.

Close the screen and then click the Submit for RO Review button.

**Create Applicant Pre-Award based on SFI Conditions**

If your application is at the status of offered subject to revisions, and you wish to proceed with the award process, you will be required to create an Applicant Pre-Award budget in calendar year format. Any changes outlined as part of the approval conditions should be incorporated into this budget.

Follow these instructions to create an Applicant Pre-Award budgets.


1. Log into the **SESAME Researcher Workbench**.

Your application will be listed under the **Current Applications** tab.

Current Applications						
Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit
12/A/1775	Aoibh testing email address change	Investigator Programme - Investigator Award	Full Proposal - Under Review	15/05/2012 14:53:50	Lead Applicant	<a href="#">Details</a>

2. Click on the **Details** button for the application.

The details associated with the application are displayed along with a number of buttons.


Welcome: New Reviewer
Home | Profile | Help

[Export as PDF](#)



**Principal Investigator Programme Full Proposal**



Conditions for Letter of Offer	
Award Duration	36 months
Award Amount	€ 12,000.00

3. Click on the **View Budget** button to display the budget history for the application.
4. Ensure that the checkbox adjacent to the budget with a status of Current is selected and then clicked on the button labelled **Create Application Pre-Award Budget**.

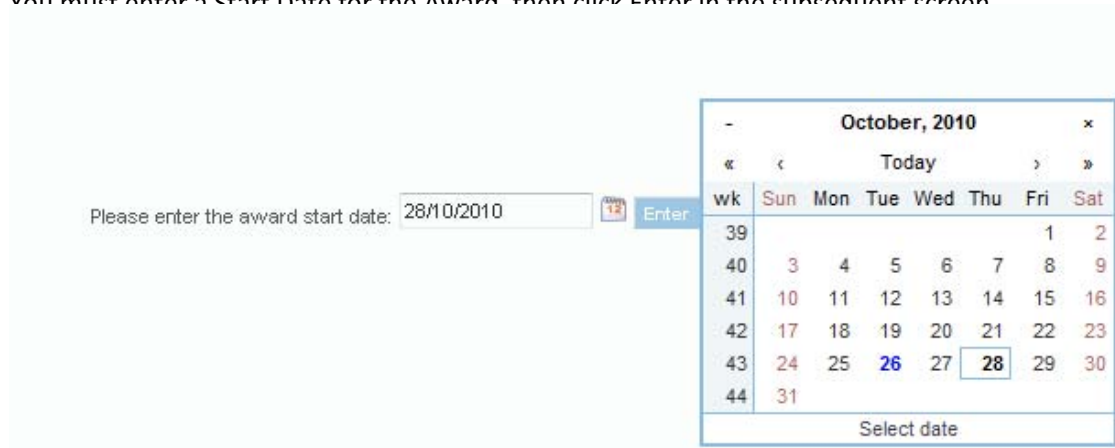
**Budget History**

	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Requested	Current	New Reviewer	26/10/2010 17:07	26/10/2010 22:09:22	<a href="#">Open Budget</a>

Submission confirms acceptance and agreement with the SFI Grants Terms and Conditions, and that the institution ensures the applicant meets eligibility requirements, and that the project is in full agreement with all legal and regulatory matters governing research in Ireland, and no aspect of this project is already funded from another source and all details provided are correct.



You must enter a Start Date for the Award, then click Enter in the subsequent screen.



You will then see a new Applicant Pre-Award budget listed in the Budget History screen.

Budget History						
	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Applicant Pre-Award	Draft	New Reviewer	26/10/2010 17:16	26/10/2010 22:17:15	<a href="#">Open Budget</a>
<input type="radio"/>	Requested	Current	New Reviewer	26/10/2010 17:07	26/10/2010 22:09:22	<a href="#">Open Budget</a>

If there are no associated buttons appearing when the Applicant Pre-Award checkbox is populated then you will need to populate a checkbox with one of the other budgets and then re-click on the Applicant Pre-Award checkbox.

You can edit the budget by clicking on the Open Budget button across from this budget.

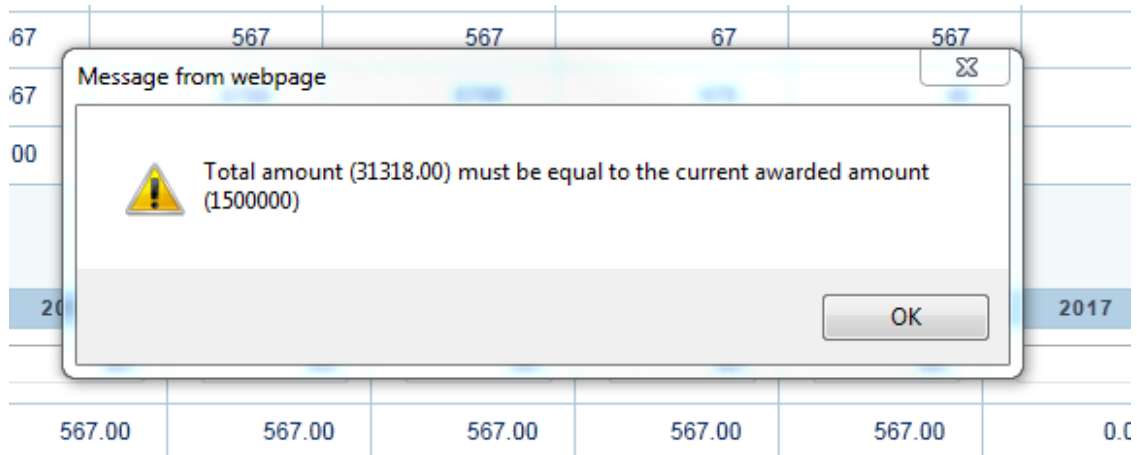
You will be presented with the same Budget entry screen as shown in Module 6. The Applicant Pre-Award budget that you have created is a copy of your Requested Budget. You can amend the Applicant Pre-Award Budget, aligning it to the amount specified by SFI along with any conditions.

5. Enter or update the Staff, Equipment, Materials and Consumables, and Travel costs.
6. You may make changes to the budget, and click Save Draft to save any draft changes before you are ready to submit for approval.



7. Clicking the **Save** button will validate your budget against the amount set by SFI. If there is a difference in the amount entered in your budget, you will receive a warning message as below.





Once you have aligned your amount to the correct figure, click on Save and the revised budget is saved and associated with your application with a status of draft.

7. Click the **Close** button.

Close

### Revise Start Date

If you are required to revised your start date, you may do this while the budget is either in Draft or at Requires Revisions. It cannot be done when the budget is in the process of being approved or after it is approved.

1. In the **Budget History** window, click on the radio button beside the Applicant Pre-Award Budget and then click on **Revise Start Date**.

Submit to FO

Delete Budget

Revise Start Date

2. Enter the revised start date and click **Enter**.

October, 2012							
Today							
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
40		1	2	3	4	5	6
41	7	8	9	10	11	12	13
42	14	15	16	17	18	19	20
43	21	22	23	24	25	26	27
44	28	29	30	31			

Select date

Please enter the revised award start date:  

- This will amend your award start date. The start date can be revised as many times as necessary ahead of the budget being approved.
- Once the budget is complete, click on the **Submit to FO** button, which will update the status of the budget to **For FO Approval**.

You have now completed the revised version of the budget, and the application is submitted to the Research Body for endorsement.



If you wish to restart the process, including removing the entered Applicant Pre-Award budget then you also have the option to Delete the budget by clicking on the button labelled **Delete Budget** while the budget is in Draft or Requires Revisions.

### Update Applicant Pre-Award budget based on revision requests

If your Research Body or SFI has requested revisions to your Applicant Pre-Award budget, you may need to modify your budget to meet any changes outlined as part of the approval conditions.

Follow these instructions to create a revised budget.

- Log into the **SESAME Researcher Workbench**.

Your application will be listed under the **Current Applications** tab.

- If the Research Body or SFI has requested revisions to the Applicant Pre-Award Budget then the status of the application should remain at Full Proposal – Offered Subject to Revision and the Lead Applicant will be notified by email of the need to revise the budget.
- Click on the **Details** button for the application.

Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit
12/IA/1775	Aoibh testing email address change	Investigator Programme - Investigator Award	Full Proposal - Under Review	15/05/2012 14:53:50	Lead Applicant	<a href="#">Details</a>

The details associated with the application are displayed alongside a number of buttons.



<b>Conditions for Letter of Offer</b>	
<b>Award Duration</b>	36 months
<b>Award Amount</b>	€ 12,000.00

- Click on the **View Budget** button to display the budget history for the application.

Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/> Applicant Pre-Award	Requires Revision	New Reviewer	27/10/2010 15:00	27/10/2010 20:02:11	<a href="#">Open Budget</a>
<input type="radio"/> Requested	Current	New Reviewer	27/10/2010 14:49	27/10/2010 19:59:36	<a href="#">Open Budget</a>

Submission confirms acceptance and agreement with the SFI Grants Terms and Conditions, and that the institution ensures the applicant meets eligibility requirements, and that the project is in full agreement with all legal and regulatory matters governing research in Ireland, and no aspect of this project is already being funded from another source and all details provided are correct.

[Submit to FO](#)

You can edit the Applicant Pre-Award budget by clicking on the Open Budget button across from this budget.

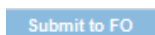
You will be presented with the same Budget entry screen as shown in Module 6, and will follow the same process to Save the budget details.

- Enter or update the Staff, Equipment, Materials and Consumables, and Travel costs.
- Click the **Save** button.



The revised Applicant Pre-Award budget is saved but remains associated with your application with a status of Requires Revision.

Once it is complete, click on the **Submit to FO** button, which will update the status of the budget to **For FO Approval**.



**Update your revised work programme based on SFI Conditions**

If your application is offered subject to revisions by SFI and you wish to proceed with the award process, you will be required to upload revised work programme and budget justification documents.

The following process is used to upload the revised workplan document.

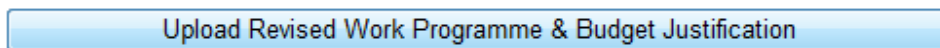
1. Log into the **SESAME Researcher Workbench**.

Your application will be listed under the **Current Applications** tab.

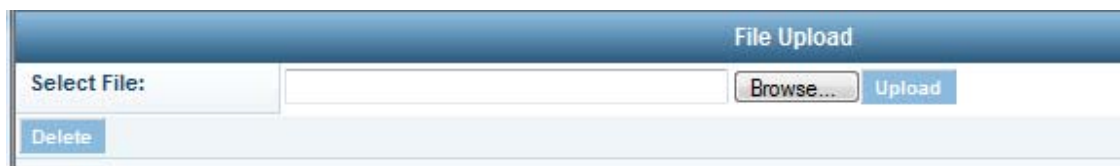
2. Click on the **Details** button for the application.

The application details associated with the application are displayed.

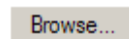
3. Click on the **Upload Revised Work Programme & Budget Justification** button at the top of the screen.



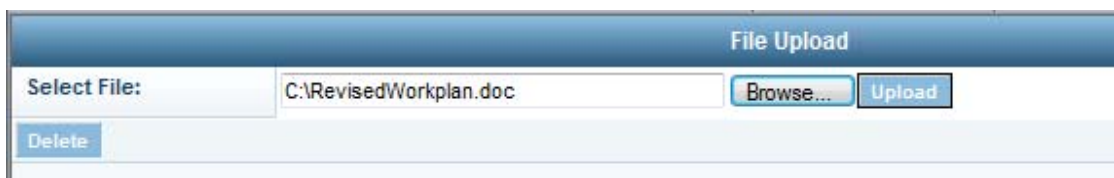
The Attach File window is displayed.



4. Click the **Browse** button.

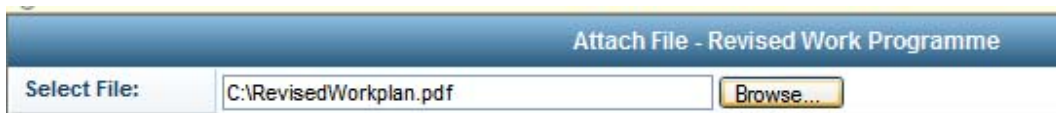


5. Locate the **file** on your computer.



6. Click the **Open** button.

The document file is displayed in the Select File field.



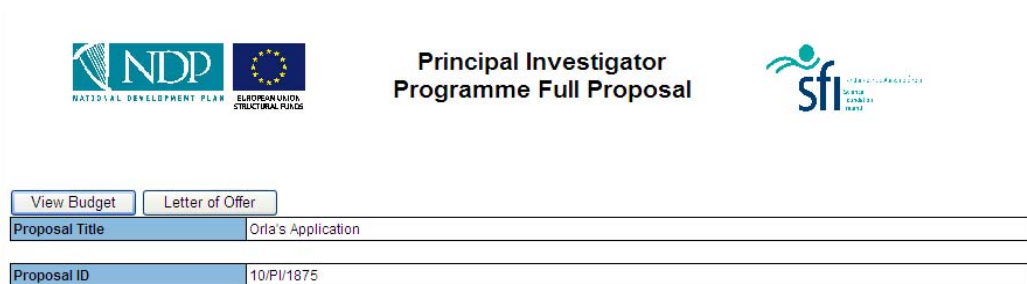
7. Click the **Upload** Button to upload the file. Close the Attach File window.

### Viewing the Letter of Offer

After accepting the requested revisions and updating your applications, the award may be formally offered by SFI. An SFI Staff member will generate the Letter of Offer, Payment Schedule

and Award Reporting Schedule and the overall status of the Application will move to Full Proposal - Offered.

1. As Lead Researcher, you will receive a workflow email to notify you of the change in status and the availability of the Letter of Offer.
2. Log into the SESAME portal.
3. Click on the **Current Applications** tab.
4. Access the appropriate Application by clicking on the Details button. The Application will have a status of Full Proposal – Offered.



5. You will be presented with an overview of the Research Proposal plus buttons labeled as follows:
  - **Letter of Offer:** click this to download or print a copy of the Letter of Offer.
  - **View Budget:** click this to view budget details.
6. Click on the **Letter of Offer** button and then on the **Export as PDF** button to convert the document to a PDF and save a copy locally or to Print a copy straight away.
7. The document will need to be signed by the Research Body contact and scanned onto their machine so that it can be uploaded against the application.

## Module 11: Reporting and Updating your Award

*Upon completion of this module you will be able to:*

- View Active Award Details
- Update and Submit Annual reports.
- Access Annual Report Revision Requests
- Approve Financial reports.
- Submit Surveys

### Introduction

During the life of the award you are required to update your project progress on a regular basis. The frequency of these reports will be determined at the time of offer and will vary from award to award.

Updating the award consists of three types of activities:

- Preparing and / or approving **Financial** and **Annual Reports** including a budgetary update. It is important to note that award payments are based on completed reports. When the award is first established each reporting milestone is created by SFI and linked to the project.
- Attributing **Specific Research Outcomes** to the award (e.g. publications, patents, funding leverage etc). Although the Financial and Annual reports must be completed as per the reporting schedule, you can create and attribute research outcomes at any time and subsequently link them to a specific report.
- Preparing the **Final Report** - this report is only required at the end of the final year of the award and is similar to the annual report but includes a summary of all activities for all years of the award.

In this module you will see how to review the list of reports, complete an annual report, and create and attribute research outcomes.

### View Active Award Details

1. Login into your Sesame workbench.
2. Click the **Active Awards** tab.
3. All active awards are displayed alongside a number of buttons.

Current Applications		Active Awards	Non-Active Awards
<b>Award</b>		<b>Reports</b>	
<b>Modelling</b>	(11/PI)	<a href="#">Award Details</a>	<b>Financial Report</b> Requires Revision Due Date: 01-10-2012
/ )		<a href="#">Open Budget</a>	<b>Financial Report</b> Draft Due Date: 01-04-2013
Principal Investigator		<a href="#">Report Schedule</a>	<b>Annual Report</b> Draft Due Date: 01-05-2013
RB Ref: This is the research body reference thank you very much		<a href="#">Report History</a>	
Start Date: 01-04-2012		<a href="#">Revised Work Programme</a>	
Close Date: 31-03-2020			

The right hand side of the screen provided a list of Reports, whether Annual or Financial, with required dates close to the current date. Each report option has an adjacent button labelled Open Report to allow access to the actual report itself.

The left hand side of the screen provides a number of other buttons, which are discussed below.

**Award Details:** Access to the proposal document, which provides an overview of the application.

**Open Budget:** view of the Budget history.

**Report Schedule:** non-editable version of the Report Schedule.

**Report History:** overview of all Reports that have been submitted so far for the Award.

**Revised Work Programme:** uploaded revised work programme

### Updating and Submitting Annual Reports

The key difference between a Lead and a Co-Applicants for these processes is that while both types of applicants can complete their profile, add transactions to the reports, and completed various sections, only the Lead Applicant can submit the completed report to SFI.

1. Login to your SFI workbench.
2. You can update your profile with any new research activities that are relevant to the annual report using the same process as outlined in Module 3 (Adding Research Activities) and in the separate "[Guidelines for completing and submitting your profile on SESAME for Census purposes](#)". Alternatively, you can add the research activities to your profile, while you are preparing the report (this option will be discussed in this section)
3. Click the **Active Awards** tab (on the home page of your workbench).

The appropriate Award Reporting buttons are displayed across from the award.

Current Applications		Active Awards	Non-Active Awards
<b>Award</b>		<b>Reports</b>	
<b>Modelling</b>	(11/PI)	<a href="#">Award Details</a>	<b>Financial Report</b> Requires Revision Due Date: 01-10-2012
/ )		<a href="#">Open Budget</a>	<b>Financial Report</b> Draft Due Date: 01-04-2013
Principal Investigator		<a href="#">Report Schedule</a>	<b>Annual Report</b> Draft Due Date: 01-05-2013
RB Ref: This is the research body reference thank you very much		<a href="#">Report History</a>	
Start Date: 01-04-2012		<a href="#">Revised Work Programme</a>	
Close Date: 31-03-2020			

The reports are listed in due date sequence.

4. Locate the report that requires preparation.
5. Click the **Open Report** button.



The Report is displayed.

(Note: Depending on the report type selected, the screen presented will differ from those shown below. This example uses the most common type of report that you will have to complete – the Annual Report.)

Annual Report	
Proposal ID:	11/IA/1418
Title:	25112011
Lay Persons Title:	<input type="text"/>
Lead PI:	Prof. Researcher10 Munster
Co-PI:	
Research Body:	University of Munster
Report Type:	Annual Report
Report Due Date:	06/02/2012
Year of Report:	N/A
Lead PI % Commitment:	<input type="text"/>
Co-PI % Commitment Details:	

- There are a number of different annual report templates depending on the programme. More detailed guidelines in relation to these templates can be found on the SFI website at <http://www.sfi.ie/funding/sfi-reporting-procedures/>
- The individual sections comprise a number of elements/questions.
- Text fields exist to allow entry and capture of basic reporting information

#### Strategic Information

Outline the value to Ireland produced by the research over past year (bullet point format appreciated)

Style  Format  Font  Size

- If there are associated co-applicants associated with the Award, they will be listed in the Co-PI % Commitment Details section.

Co-PI % Commitment Details:	Co-Applicant Name	% Commitment	Click button to change % commitment for co-applicants.
	Mr. R Smith	25	<input type="button" value="% Commitment"/>

10. This section will also include a button labelled **% Commitment** adjacent to each Co-applicant. Click on this button if you wish to add or update the % Commitment for the co-applicant. The following screen will appear.

**Co-applicant % Commitment Details.**

**% Commitment:**

11. Update or enter a value and then click Save. The following screen appears.

**Co-applicant information successfully saved.**

12. Click Close button to exit the screen and return to the Annual Report screen. You will have to click Save Draft to see the new % Commitment value appear within the report itself.

**Attributing Transactions from your Profile**

1. You have access to buttons to launch Transaction Attribution screens – this allows you (as Lead Researcher or co-applicant) to associate information from your Profile to the Annual Report.  
(Note: Depending on the particular section, the specific screens and fields can vary. The example shown below is based on the ‘Conferences / Workshops Organised’.)

Details of Any Conferences/Workshops/Seminars Hosted/Organised During Reporting Period

[Add from Profile](#) [Create New](#)

Details of Any Conferences/Workshops/Seminars Hosted During Reporting Period				
Conference / Workshop Title	Sponsor Organisation	Start Date	End Date	Role
Test Conference	Test SO	05/07/2010	07/07/2010	Member Organising and Programme committee

2. Simply click on the appropriate **Add from Profile** button and you will be presented with a screen similar to the one shown below.

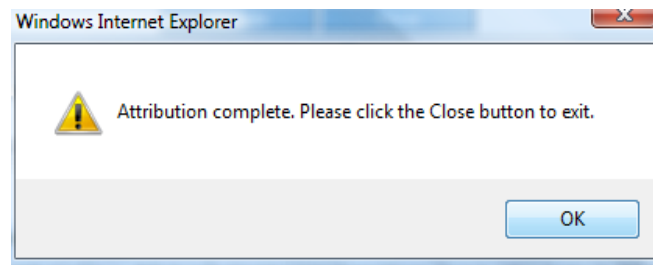
Personal Transactions

▼

		Start Date	End Date	Title	Role	Location	Primary Proposal attribution
<input checked="" type="checkbox"/>	<a href="#">Open</a>	2010-07-05	2010-07-07	Test Conference	Member Organising and Programme committee	Ireland	Other NON-SFI award

[Attribute](#) [Close](#)

3. Check the box(es) beside the transaction(s) you wish to associate with the report and click on the button labelled **Attribute**.
4. Click **OK** in the subsequent screen



5. Click **Close** on the Transaction Attribution screen when complete.
6. If you wish to see the information appear against the actual report then click **Save Draft** at the bottom of the Report. The attribution transaction information will now appear in a table within the report.

Details of Any Conferences/Workshops/Seminars Hosted/Organised During Reporting Period

[Add from Profile](#) [Create New](#)

Details of Any Conferences/Workshops/Seminars Hosted During Reporting Period				
Conference / Workshop Title	Sponsor Organisation	Start Date	End Date	Role
Test Conference	Test SO	05/07/2010	07/07/2010	Member Organising and Programme committee

**Removing attributed transactions**

1. If you wish to remove an attribution of a transaction, you may do this by clicking on **Add from Profile** button against the relevant section.
2. The list of transactions attributed to your report will display with tickboxes. If you wish to remove a transaction, untick the transaction and click Attribute.

Transaction Multi-Attribution

Personal Transactions

		Start Date	End Date	Title	Role	Location	Primary Proposal attribution
<input checked="" type="checkbox"/>	<a href="#">Open</a>	2010-07-05	2010-07-07	Test Conference	Member Organising and Programme committee	Ireland	Other NON-SFI award
<input type="checkbox"/>	<a href="#">Open</a>	2013-11-26	2013-11-28	AITZA Test	Member Organising and Scientific committee	Ireland	Other NON-SFI award

[Attribute](#) [Close](#)

3. Click **OK** on the following message. Only the selected transactions will display on the report, once **Save Draft** is clicked.

**Creating New Transactions**

1. Alternatively, click on the **Add New** button to add new transactions to this report and to your Profile. (Again, the specifics will vary depending on the type of transaction.
2. Enter the relevant details and click **Save**.  
This report, and your Profile, will be updated with the details of the new transaction.
3. Close the transaction window and click on **Save Draft** to view the details on the report.

**Editing Profile Transactions**

4. While completing your annual report you may wish to edit a transaction that has already been created against your profile. To do this, click on **Create New**, and then

the View List. This will give you a list of any transactions created against the relevant section.

New		Sort By: Default		Asc		
	Start Date	End Date	Amount of Funding Allocated to PI	Funding Body	Funding Programme	Status
<a href="#">Open</a>	12/11/2013	10/11/2017	€111.00	Science Foundation Ireland (SFI)	Test FP	Current
<a href="#">Open</a>	13/11/2013	09/11/2017	€20,000.00	Science Foundation Ireland (SFI)	test	Pending
<a href="#">Open</a>	28/11/2013	28/11/2017	€50,000.00	Science Foundation Ireland (SFI)	Test FP	Pending

5. Click on the Open button beside the relevant transaction

**General Information** | **Research Profile** | **Research Summary**

After adding or modifying any of the transactions listed below please click [Refresh](#) to update **Research Profile** tab.

**Education** (0) [Upload](#) [Add New](#) [Show](#)

**Employment** (0) [Upload](#) [Add New](#) [Show](#)

**Professional Societies** (0) [Upload](#) [Add New](#) [Show](#)

**Significant Distinctions / Awards** (0) [Upload](#) [Add New](#) [Show](#)

**Funding Diversification** (2) [Upload](#) [Add New](#) [Hide](#)

Edit/View	Start Date	End Date	Amount of Funding Allocated to PI (€)	Funding Body	Funding Programme	Status
<a href="#">Open</a>			€111.00	Test	Test	Expired
<a href="#">Open</a>			€20,000.00	testing	test	Current

6. Relevant section will be fully displayed. Click OK on the message.

**Edit Funding Diversification**

Back New

Funding held as an Independent PI?: Yes

Funding Programme: test

Funding Body: Science Foundation Ireland (SFI)

Title of Proposal: Title of Proposal Test

Brief description of proposal including website and names of partners, where available. For pending awards, please also indicate expected decision date: test

Grant No:

Status: Pending

Total Amount of Funding for the Project (€): 89000

Amount of Funding Allocated to PI (€): 20000

Percentage of the allocated funding that is cash:

Position held on Award: PI

Time Commitment (%): 80

Start Date: 13/11/2013

End Date: 09/11/2017

Headcount:

Created By: Dane Bowers

Save Copy Delete

This Research Funding has been added to your profile and to the Report for Year 3.

OK

For Census purposes, SFI is only concerned with "Current Funding". Although potentially relevant for other purposes within SESAME such as grant applications and annual grant progress reporting, the inclusion of "Expired" or "Pending" funding, is not required for your year-end census return.

7. You may then edit as required and click **Save** and **OK**. You may now exit this screen.

**Edit Funding Diversification**

Back New

Funding held as an Independent PI?: Yes

Funding Programme: test

Funding Body: Science Foundation Ireland (SFI)

Title of Proposal: Title of Proposal Test

Brief description of proposal including website and names of partners, where available. For pending awards, please also indicate expected decision date:

test

249 words left

Grant No: 55656

Status: Pending

Total Amount of Funding for the Project (€): 89000

Amount of Funding Allocated to PI (€): 20000

Percentage of the allocated funding that is cash:

Position held on Award: PI

Time Commitment (%): 80

Start Date: 13/11/2013

End Date: 09/11/2017

Headcount:

Created By: Dane Bowers

Save Copy Delete

For Census purposes, SFI is only concerned with "Current Funding". Although potentially relevant for other purposes within SESAME such as grant applications and annual grant progress reporting, the inclusion of "Expired" or "Pending" funding, is not required for your year-end census return.

8. To display this transaction on your report, click **Save Draft** at the bottom of the page.

Documentation

SFI Annual Progress Report

Open

Save Draft Submit

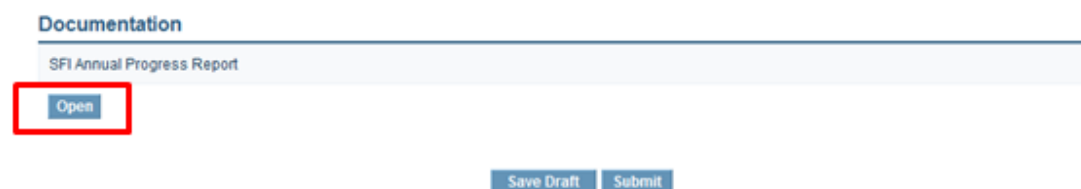
9. These transactions may also be modified directly in your profile after they have been attributed to the report. To view changes, click on **Save Draft** on the annual report form.

### Deleting Profile Transactions

1. If you have created a profile transaction in error, you may delete the transaction. This will remove the transaction from your profile and your annual report.
2. Either from **Manage Profile** or from the **Create New** buttons against each section. Open the transaction by clicking on the number.
3. Once you have selected the number of the transaction, you will see the details along with the **Save**, **Copy** and **Delete** buttons.
4. Click the **Delete** button. If you are sure you want to delete the transaction, you may click **OK**, or **Cancel**.

### Viewing and Submitting the Report

1. If you are the Lead Researcher, you should also contact the co-applicants and have them complete their updates before you click on **Submit** – to submit the completed report to SFI. However, the Lead Applicant will also have the option to update these fields if required.
2. Remember, only the Lead Applicant will be able to **Submit** the report.
3. Ahead of submitting the report, you may view a web page view, exportable to PDF of the by scrolling to the end of the web page and clicking **Open** beneath the **SFI Annual Progress Report** section.



4. The report will open in a separate window. Click on Export as PDF to export as a PDF document and save to your machine or print.

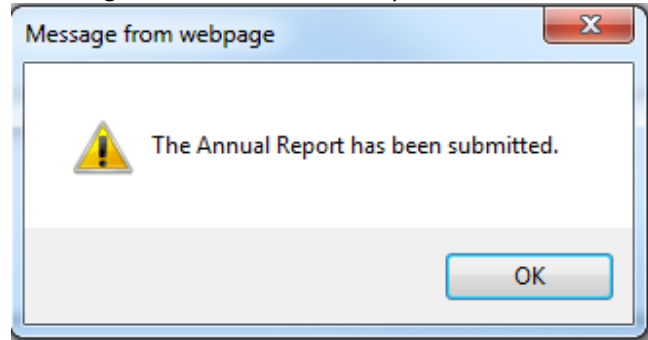




5. Once you are ready to Submit click on the Submit button at the bottom of the page.



6. You will receive a message to indicate that the report has been submitted.



### Accessing Annual Report Revision Requests

Once the Annual Report has been submitted it then undergoes a review process. At any stage in this process an SFI Staff member may request revisions to the report.

1. If this happens then when the Applicant logs into the system and clicks on the Active Awards tab then they will see an Annual Report with a status of Requires Revision.

2. The Applicant should click on the Open Report button to view the report details.
3. The details of the revisions that have been requested will be shown at the top of the Report.

4. The applicant can make the necessary changes using the same process as when entering the initial details.
5. They then click the Submit button and click OK on any subsequent pop-up alerts.
6. They will be presented with the following screen, informing them that the report has been submitted, and can return to their homepage by clicking on the appropriate link.

here to return to your homepage.'"/&gt;

### Approving Financial Reports

Responsibility for the creation and submission of the Financial Reports rests with the Research Body Finance Officer. However, once these have been submitted then the Lead Researcher will be notified via a workflow email that a Financial Report requires approval before final approval by the Finance Officer. If you are the Lead Researcher, please follow this process in order to approve the Financial Report.

1. Log into your SESAME portal and click on the **Active Awards** tab.
2. Click on the **Open Report** button against the Financial Report you wish to review. This report will have a status of **For Applicant Review**.

Current Applications	Active Awards	Non-Active Awards			
<b>Award</b> Modelling - (11/PI) Principal Investigator RB Ref. This is the research body reference thank you very much Start Date: 01-04-2012 Close Date: 31-03-2020		<b>Reports</b> <table border="1"> <tr> <td> <a href="#">Award Details</a>  <a href="#">Open Budget</a>  <a href="#">Report Schedule</a>  <a href="#">Report History</a>  <a href="#">Revised Work Programme</a> </td> <td> <b>Financial Report</b>                              Requires Revision                              Due Date: 01-10-2012    <b>Financial Report</b>                              For Applicant Review                              Due Date: 01-04-2013    <b>Annual Report</b>                              Draft                              Due Date: 01-05-2013                         </td> <td> <a href="#">Open Report</a>    <a href="#">Open Report</a>    <a href="#">Open Report</a> </td> </tr> </table>	<a href="#">Award Details</a> <a href="#">Open Budget</a> <a href="#">Report Schedule</a> <a href="#">Report History</a> <a href="#">Revised Work Programme</a>	<b>Financial Report</b> Requires Revision Due Date: 01-10-2012  <b>Financial Report</b> For Applicant Review Due Date: 01-04-2013  <b>Annual Report</b> Draft Due Date: 01-05-2013	<a href="#">Open Report</a>  <a href="#">Open Report</a>  <a href="#">Open Report</a>
<a href="#">Award Details</a> <a href="#">Open Budget</a> <a href="#">Report Schedule</a> <a href="#">Report History</a> <a href="#">Revised Work Programme</a>	<b>Financial Report</b> Requires Revision Due Date: 01-10-2012  <b>Financial Report</b> For Applicant Review Due Date: 01-04-2013  <b>Annual Report</b> Draft Due Date: 01-05-2013	<a href="#">Open Report</a>  <a href="#">Open Report</a>  <a href="#">Open Report</a>			

3. An overview of the Financial Report details is displayed for Review along with access to the individual analysis worksheets.

Financial Report

Please fill in the following fields to complete your report.

Proposal ID:	11/PI/1026
Lead Applicant:	Calvin Harris
Research Body:	University of Ireland
Report Type:	Financial Report
Research Body Ref:	This is the research body reference thank you very much
Report Due Date:	01/04/2013

Submitted Date:	
Reporting Period:	Jul 2012 - Dec 2012
Expenditure Details:	<a href="#">Open</a>
Staff Expenditure Analysis:	<a href="#">Open</a>
Equipment Expenditure Analysis:	<a href="#">Open</a>
View Consolidated Financial Report:	<a href="#">Open</a>

Lead Applicant Decision: --Select One--

[Save Draft](#)
[Submit](#)

4. To access the individual analysis worksheets then click on the button labeled Open across from the section you wish to complete.

Expenditure Details: [Open](#)

Staff Expenditure Analysis: [Open](#)

Equipment Expenditure Analysis: [Open](#)

- You can then provide updates in the text fields where an explanation of variances is required. All other sections of the worksheet cannot be modified.

	CUMULATIVE ACTUAL EXPENDITURE	CUMULATIVE BUDGET	CUMULATIVE PAYMENTS	BUDGET VARIANCE	BUDGET VARIANCE %	PAYMENTS VS ACTUAL	PAYMENTS VS ACTUAL %	PLEASE EXPLAIN VARIANCE GREATER THAN ±10%
Staff	1000	1000		0	0.00			
Equipment	990	1000		-10	-1.00			
Materials	900	1000		-100	-10.00			Were able to save money buying in bul
Total	1000	1000		0	0.00			

- You then click Save and Close to return to the overall Financial Report screen.

[Save](#) [Clear](#) [Close](#)

- If you want an overview of the report then you can click on the **Open** button to the right of the View Consolidated Financial Report in order to see further details of the report.

[Export as PDF](#)



Principal Investigator Programme  
Long Form Financial Claim



Research Body:	Trinity College Dublin (TCD)
SFI Principal Investigator:	New Reviewer
Research Programme No.:	10/PI/1789
Start Up Date:	27/10/2010
End Date:	26/10/2013
Reporting Date:	01/04/2011
Reporting period:	Jan 2011 - Jun 2011
Report No.:	2

	Cumulative Actual Expenditure to end reporting period.	Cumulative Budget to end reporting period.	Cumulative Payments to end reporting period.	Budget v Actual Expenditure Overspend / Underspend	Percentage Overspend / Underspend	Payments v Actual Expenditure
Staff Remuneration	€1,000.00	€1,000.00	€0.00	€0.00	0.00	-€1,000.00
Equipment	€1,000.00	€1,000.00	€0.00	€0.00	0.00	-€1,000.00
Materials	€1,000.00	€1,000.00	€0.00	€0.00	0.00	-€1,000.00
Travel	€1,000.00	€1,000.00	€0.00	€0.00	0.00	-€1,000.00
Miscellaneous	€1,000.00	€0.00	€0.00	€1,000.00	0	-€1,000.00
Sub Total	€5,000.00	€4,000.00	€0.00	€1,000.00	25.00	-€5,000.00
Overhead 30% MTDC	€1,200.00	€900.00	€0.00	€300.00	33.33	-€1,200.00
Total	€6,200.00	€4,900.00	€0.00	€1,300.00	26.53	-€6,200.00

STAFF ANALYSIS

Table below provides an overview of actual salary and fees expenditure up to end reporting period.

Title	Name	Staff / Student No.	Position	Gender	Start Date	Finish Date	Annual Salary	Salary Paid to Date	Fees Paid to Date	Salary and Fees
Dr.	First Last	123456	Research Assistant (Level 1) Point 2	Male	01/01/2010	31/12/2010	€15,000.00	€12,500.00	€1,000.00	€13,500.00

8. After reviewing the report content, return to the original report form (close the consolidated report screen) and indicate your decision to approve (or request revisions from your Research Body – Finance Office) by selecting the appropriate value from the Lead Applicant Decision drop-down list.

Lead Applicant Decision:

--Select One--  
Request Revision  
Approved

9. If you select **Request Revisions** you will have the opportunity to describe these revisions and your reasoning in a text field.
10. Once you have provided a decision, click the **Submit** button.
11. The Financial Report will be locked, preventing you from changing it further.
12. The Research Body will be notified if there is a need for revisions or clarifications.
13. Once the Finance Officer has made these revisions, they will once again submit for the Researcher's approval. This process can be repeated as many times as necessary.
14. If you are satisfied that the report is complete and should be submitted back to the Finance Officer for submission to SFI, select **Approved** and click **Submit**

Financial Report

Please fill in the following fields to complete your report.

Proposal ID:	11/IA/1418
Lead Applicant:	Researcher10 Munster
Research Body:	University of Munster
Report Type:	Financial Report
Report Due Date:	01/04/2012
Submitted Date:	
Reporting Period:	Jul 2011 - Dec 2011
Expenditure Details:	<a href="#" style="background-color: #2c5e8c; color: white; padding: 2px 5px; text-decoration: none;">Open</a>
Staff Expenditure Analysis:	<a href="#" style="background-color: #2c5e8c; color: white; padding: 2px 5px; text-decoration: none;">Open</a>
Equipment Expenditure Analysis:	<a href="#" style="background-color: #2c5e8c; color: white; padding: 2px 5px; text-decoration: none;">Open</a>
View Consolidated Financial Report:	<a href="#" style="background-color: #2c5e8c; color: white; padding: 2px 5px; text-decoration: none;">Open</a>

Lead Applicant Decision:

[Save Draft](#)
[Submit](#)

15. The Finance Officer will then be able to submit to SFI.

### Updating and Submitting Surveys

Some awards require an annual survey to be completed and returned to Science Foundation Ireland. If your award requires a survey return you will be sent a reminder to complete the survey on your workbench. Please follow the guidelines below for completing surveys.

1. Login to your SFI workbench.
2. Click on the **Surveys** tab.



3. Click on the **Open Survey** button to complete the survey

Proposal ID	Project Title	Status	Survey Date	Survey Year	
15/TIDA/1243	Francisca Testing	Draft	30/06/2014	1	<b>Open Survey</b>
15/TIDA/1243	Francisca Testing	Approved	30/06/2015	2	Open Survey
15/TIDA/1243	Francisca Testing	Draft	30/06/2016	3	Open Survey
15/TIDA/1243	Francisca Testing	Draft	30/01/2014	5	Open Survey
15/TIDA/1243	Francisca Testing	Approved	30/01/2015	6	Open Survey
15/TIDA/1243	Francisca Testing	Draft	30/01/2016	7	Open Survey

4. The survey is a combination of text fields and information from your research profile. Text fields can be completed by typing straight on the form or you may also copy and paste unformatted text (without bullet points) into these text fields.
5. If you wish to review how to attribute, edit, remove and delete transactions to your survey please review these sections above in the Annual Report [section](#).

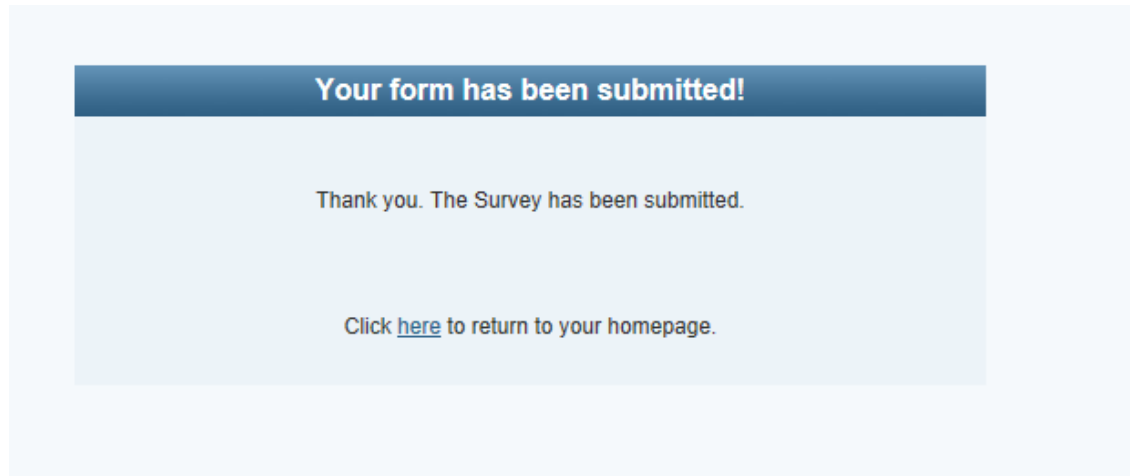
### Viewing and Submitting the Survey

1. The survey may be completed over different sessions. Once you are ready to Submit click on the Submit button at the bottom of the page.

Save Draft

**Submit**

2. You will receive a message to indicate that the survey has been submitted.



3. Once submitted the Programme Manager within SFI will review the survey results. If they wish to clarify any section they may Request Revisions. You will receive an email to confirm that revisions are required. At this time you will be able to revise the sections required and click on Submit once more.

## Module 12: Applying for a No Cost extension or Budget Reallocation

Upon completion of this module you will be able to:

Apply for a No Cost Extension

Apply for a Budget Reallocation.

### Introduction

At any time during the award you can request a budget modification. This process is similar to an award application with the budget and requests being reviewed by your Research Body prior to being submitted to SFI.

This module describes the process to request a no-cost extension or a budget reallocation.

- You prepare the rationale for the request and, in the case of a budget reallocation; you prepare a new budget based on the latest approved budget.
- You submit the request to your research body.
- If your Research Body endorses the request then it is passed to SFI for review.
- If approved by SFI, then the modification is granted and the submitted budget becomes the approved budget.

### Applying for a No Cost Extension

1. Login to Sesame.
2. Click the **Active Awards** tab.  
All active awards are displayed.
3. Click the **Open Budget** option beside the appropriate award.  
The Budget History page is displayed.
4. Check the radio button next to the version of the budget with the status of Current and then click the **Create Revised Budget** button.

Budget History						
	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Final Approved	Current	Alexandra GAM	29/11/2011 10:04	29/11/2011 10:04:37	<a href="#">Open Budget</a>
<input type="radio"/>	Applicant Pre-Award	Historic	Researcher10 Munster	29/11/2011 10:00	29/11/2011 10:04:36	<a href="#">Open Budget</a>
<input type="radio"/>	Requested	Historic	Researcher10 Munster	25/11/2011 19:44	25/11/2011 19:44:45	<a href="#">Open Budget</a>

Submission confirms acceptance and agreement with the SFI Grants Terms and Conditions, and that the institution ensures the applicant meets eligibility requirements, and that the project is in full agreement with all legal and regulatory matters governing research in Ireland, and no aspect of this project is already being funded from another source and all details provided are correct.

[Create Revised Budget](#)

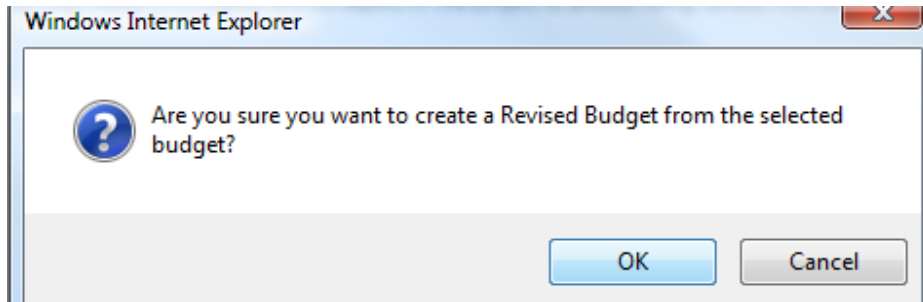
5. In the next screen select the No Cost Extension as the type of revised budget you are requesting from the drop-down list.



Please select the revision type: Budget Reallocation Enter Close

Budget Reallocation  
No Cost Extension

6. Click Enter and then click OK on any subsequent pop-ups that appear.



7. This will create a new Revised budget with a status of Draft

8. Ensure that you have the radio button for this new Draft version of the budget selected.

Budget History						
	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Revised	Draft	Calvin Harris	08/11/2012 16:26	08/11/2012 16:26:13	<a href="#">Open Budget</a>
<input type="radio"/>	Final Approved	Current	Joan Hynes	07/12/2011 17:53	08/11/2012 16:25:50	<a href="#">Open Budget</a>
<input type="radio"/>	Applicant Pre-Award	Historic	Calvin Harris	30/11/2011 20:06	07/12/2011 17:53:51	<a href="#">Open Budget</a>
<input type="radio"/>	Requested	Historic	Calvin Harris	05/05/2011 09:47	09/05/2011 15:10:40	<a href="#">Open Budget</a>

**Budget Details**

Budget Revision Type: No Cost Extension

**Request for No Cost Extension**

To create a revised budget please click on Open Budget above and save changes prior to submitting for approval

Create PDF: Open

Proposal ID: 11/PI/

Lead Applicant: Calvin Harris

Extension Duration in months:

Projected Funds Remaining after Current Expiration Date:

Justification for Extension:

Spend Plan During Period of Extension:

Submission confirms acceptance and agreement with the SFI Grants Terms and Conditions, and that the institution ensures the applicant meets eligibility requirements, and that the project is in full agreement with all legal and regulatory matters governing research in Ireland, and no aspect of this project is already being funded from another source and all details provided are correct.

Save Budget
Submit to FO
Delete Budget

9. Complete the details in the fields provided if required and ensure to click on Save Budget to save changes.
10. Click the **Open Budget** button directly across from the “Revised” budget created for the No Cost Extension request to view the current budget.
11. On the Budget History screen simply click the **Save Budget** button to retain a copy of the Budget in draft status, or click **Submit to FO** Budget to change the status to **For FO Approval**.

### Save and Submit

As with the original application, the request needs to be submitted to the Research Body for endorsement before being reviewed by SFI.

Once you are satisfied with the budget details you submit it for approval.

- Click the **Submit to FO** button.
- If the budget modification is eligible, it will be saved and submitted to your Research Office – FO for review.

### Next Steps

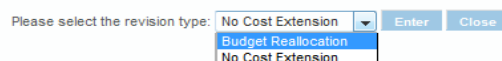
The Research Body will review the request and, if endorsed, it will be passed to SFI for further review.

### Applying for a Budget Reallocation

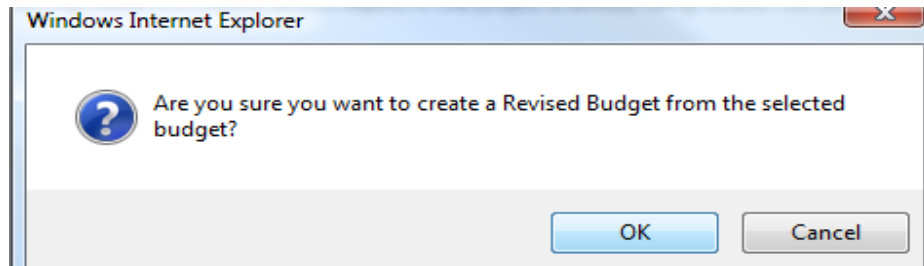
If the cost structures around the project have changed, you must apply for a budget reallocation.

SESAME provides for an automated process for the submission of a budget reallocation. If you wish to apply use the following steps.

1. Login Sesame.
2. Click the **Active Awards** tab.  
All active awards are displayed.
3. Click the **Open Budget** option beside the appropriate award.  
The Budget History page is displayed.
4. Check the radio button next to the version of the budget with the status of **Current** and then click the **Create Revised Budget** button.
5. In the next screen select the Budget Reallocation type of revised budget you are requesting from the drop-down list.



6. Click Enter and then click OK on any subsequent pop-ups that appear.



7. This will create a new **Revised** budget with a status of **Draft**.
8. Ensure that you have the radio button for this new draft version of the budget selected.

Budget History						
	Budget Type	Status	Created By	Creation Date	Last Modified	Budget Worksheet
<input checked="" type="radio"/>	Revised	Draft	Calvin Harris	12/11/2012 11:50	12/11/2012 11:50:46	<a href="#">Open Budget</a>
<input type="radio"/>	Final Approved	Current	Joan Hynes	07/12/2011 17:53	08/11/2012 16:25:50	<a href="#">Open Budget</a>
<input type="radio"/>	Applicant Pre-Award	Historic	Calvin Harris	30/11/2011 20:06	07/12/2011 17:53:51	<a href="#">Open Budget</a>
<input type="radio"/>	Requested	Historic	Calvin Harris	05/05/2011 09:47	09/05/2011 15:10:40	<a href="#">Open Budget</a>

Budget Details	
Budget Revision Type:	Budget Reallocation
Request for Budget Reallocation	
To create a revised budget please click on Open Budget above and save changes prior to submitting for approval	
Create PDF:	<a href="#">Open</a>
Proposal ID:	11/PII
Lead Applicant:	Calvin Harris
Budget Reallocation Justification:	<input type="text"/>
<small>Submission confirms acceptance and agreement with the SFI Grants Terms and Conditions, and that the institution ensures the applicant meets eligibility requirements, and that the project is in full agreement with all legal and regulatory matters governing research in Ireland, and no aspect of this project is already being funded from another source and all details provided are correct.</small>	
<a href="#">Save Budget</a>	<a href="#">Submit to FO</a> <a href="#">Delete Budget</a>

9. Click the **Open Budget** button to the right of this “Revised” budget.
10. The budget presented on this screen allows for entry of new budget details as required.
11. Complete the budget details and click **Save** and then **Close**.
12. On the Budget History screen simply click the **Save Budget** button to retain a copy of the Budget in Draft status, or click Submit Budget to change the status to For FO Approval.

### Save and Submit

As with the original application, the request needs to be submitted to the Research Body for endorsement before being reviewed by SFI.

Once you are satisfied with the reallocation details you submit it for approval.

- Click the **Submit to FO** button.

- If the reallocation is eligible, it will be saved and submitted to your Research Office – FO for review.

**Next Steps**

The Research Body will review the request and, if endorsed, it will be passed to SFI for review.

## **Module 13: Submitting Site Review Feedback**

*Upon completion of this module you will be able to:*

Accessing Site Review Feedback

Submitting a response to Site Review Feedback

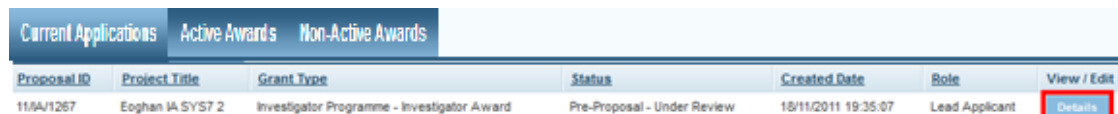
### Accessing Site Review Feedback

After the Site Review has been completed on your award, SFI will release Site Review Feedback to Researchers on the SESAME workbench. Researchers can then respond to Site Review Feedback within a specified timeline on the SESAME workbench.

Please note that the Review Feedback button will only display from the time specified by SFI. After you have submitted your feedback, it will remain visible against your application for the lifetime of the application.

Follow these instructions to access and respond to Site Review Feedback.

1. Log in to the **Researcher Workbench** and locate the award on which the Site Review was carried out on.
2. If the Site Review was carried out on a **Current Applications** click on the **Details** button for the relevant application in this tab.



Proposal ID	Project Title	Grant Type	Status	Created Date	Role	View / Edit
11MA/1267	Eoghan IA SYS7 2	Investigator Programme - Investigator Award	Pre-Proposal - Under Review	18/11/2011 19:35:07	Lead Applicant	<a href="#">Details</a>

3. If the Site Review was carried out on an Active Award, click on the Active Awards tab and click **Award Details** button for the relevant application.



Award	Reports
Francisca Testing - (12/IP/1243) Investigator Programme - Investigator Project Start Date: 01-06-2008 Close Date: 31-05-2013	Annual Report Draft Due Date: 01-07-2010
	Annual Report Draft Due Date: 01-07-2011

4. The Application will open and if within the time specified by SFI you will see the Site Reviews button which will be exposed at the top of the application summary document.



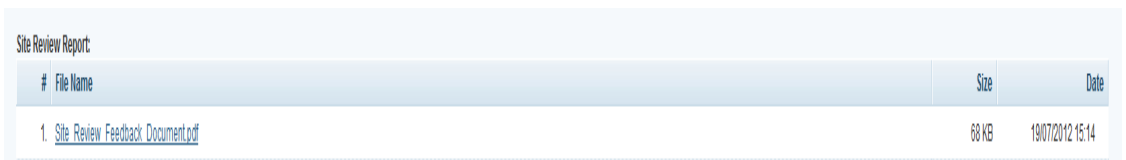
- When you click this button, this opens a new window listing any Site Reviews that exist against the award.



- Click on the Details button to expose the Site Review Feedback form.



- Any documents released by SFI for the Researcher to respond to will be included in the Site Review Report section:



**Submitting a response to Site Review Feedback**

- Once you have downloaded your feedback, you may complete your response in the Researcher Feedback text box. Please note the return date and time will be available on the top part of this form.

Please return by 19:27 on 31/07/2012

Researcher Feedback:

This is my feedback to the site review

Upload documents related to the feedback (Click **Save Draft** after uploading documents)

Multiple Files... Single File...

Submit Save Draft

2. Ensure to click on Save Draft to save your progress.

Upload documents related to the feedback (Click **Save Draft** after uploading documents)

Multiple Files... Single File...

Submit **Save Draft**

3. You may also upload documents to be submitted with your response by clicking on either the Multiple Files.... or Single File.... buttons. (Please be aware that when using the Multiple Files button you must have Java installed. Please contact your I.T. department. Single File upload does not need Java).

Upload documents related to the feedback (Click **Save Draft** after uploading documents)

**Multiple Files...** **Single File...**

4. Located the document you wish to upload, and click on Upload.

File Upload

Select File: C:\Users\Francisca.Knight\Desktop\Revie **Browse...** **Upload**

Delete



<input type="checkbox"/>	#	File Name	Size	Date
<input type="checkbox"/>	1.	<a href="#">Review Feedback Response.pdf</a>	48 KB	19/07/2012 15:51

5. Close this window and click on the Save Draft button to display your uploaded document(s).

Upload documents related to the feedback (*Click Save Draft after uploading documents*)

Multiple Files... Single File...


Submit Save Draft

#	File Name	Size	Date
1.	<a href="#">Review Feedback Response.pdf</a>	48 KB	19/07/2012 15:51

6. Once you have completed your Site Review Feedback you may submit to SFI by clicking the Submit button.

7. You will receive a message to confirm that your feedback has been submitted.

Message from webpage

 A notification has been sent to SFI to let them know that the response has been submitted.

OK

8. You will be able to review your feedback afterwards by clicking on the Site Reviews button and displaying the page with available site review feedback again.
9. Once received by SFI they may require revisions to feedback submitted. You will be notified by email of any revisions required and can then resubmit your response as above.