

# Science Foundation Ireland Grants and Awards Management System – SESAME

# **Researcher Profile and Outputs User Guide**

Science Foundation Ireland

Version: 3.2

**November 2016** 

# Copyright

This document is the property of Science Foundation Ireland and is subject to change without notice. All copyright rights of this document belong to Science Foundation Ireland and may be subject to Government Copyright in accordance with the Copyright and Related Rights Acts, 2000. The names of people, companies and research projects are fictitious and do not represent real people or research projects. No part of this document may be reproduced in any form or by any means, electronic or mechanical, for any purpose, without the express permission of Science Foundation Ireland.

# Disclaimer

While every effort is made in preparing material for publication no responsibility is accepted by or on behalf of Science Foundation Ireland or its third party providers for any errors, omissions or misleading statements contained within this documentation. This document is provided for information purposes only and as a training guide. It is not intended, and should not be relied upon, as any form of warranty, representation, undertaking, contractual, or other commitment binding in law upon Science Foundation Ireland, Forfás, the Government of Ireland, or any of their respective servants or agents.

Science Foundation Ireland denies all warranties of every nature whatsoever including without limitation, any implied warranties of quality or fitness for a particular purpose, any expressed or statutory warranties, and any warranties or duties regarding accuracy, timeliness, completeness or performance.

Version	3.1	
Date	November 2015	

# **VERSION HISTORY**

VERSION 2.0	INCORPORATING CHANGES MADE TO RESEARCH PROFILE FIELDS AND SUBMISSION PROCESS FOR 2014 RESEARCH OUTPUTS SURVEY
VERSION 3.0	CHANGE SCREENSHOTS TO REFLECT NEW SCREEN LAYOUTS
	ADD INSTRUCTIONS FOR LINKING PROFILE WITH ORCID ACCOUNT
	ADD INSTRUCTIONS FOR IMPORTING PUBLICATIONS FROM PUBMED AND ORCID
	ADD INSTRUCTIONS FOR BIBTEX PARSING
VERSION 3.1	CHANGE SCREENSHOTS AND REFLECT NEW SCREEN LAYOUTS
	AMEND INSTRUCTIONS AROUND IMPORTING FROM ORCID ACCOUNT
VERSION 3.2	UPDATE SCREENSHOTS

# **Table of Contents**

Table of Contents	4
Module 1: Introduction	5
Research Profile Overview	
Logging into SESAME	
Module 2: Managing your Contact Information	Q
Updating your Profile	
Editing Basic Contact Information	
Module 3: Adding Research History and Outputs (for Annual Survey and Reporting)	11
Overview of the Research Profile Tab	
Adding records to the Research Profile Tab	
Viewing / Editing Records to the Research Profile Tab	
Copying Existing Records in the Research Profile Tab	
Deleting Records from the Research Profile (Single Record)	16
Deleting Records from the Research Profile (Multiple Records)	17
Module 4: Importing Publications	19
Importing from Pubmed	
Importing Publications from ORCID	21
Completing Imported Records	
BibTex Parser	25
Module 5: Census Submission	27
Overview of the Census Submission Process	27
Logging on During the Census Period	27
Completing your Profile During the Census Period	27

#### **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 certain information (known as transactions in SESAME), such as research funding, can be pulled from your profile into your application as required. In addition, 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 transactions from your profile. Conversely you can create the new transactions within your annual report, which will automatically update your profile.

Your Researcher profile consists of two main types of information.

- General information, ranging from contact information, date of birth, and nationality, to detailed
  information on key achievements and research outputs. See module 2 for information on how to
  add / edit this data.
- Research Profile information which details your background, team composition and related
  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 the most significant ones to attribute to a specific annual report or
  application as required. See module 3 for information on how to add / edit data in this section.

# **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: <a href="https://grants.sfi.ie">https://grants.sfi.ie</a>

1. Start your **Web Browser**.



SESAME supports the two most recent versions of Internet Explorer, Chrome and FireFox.

With Mac we recommend that you use either Firefox or Chrome.

2. Type the SESAME **address** into the **address bar** of your browser or click on this link: https://grants.sfi.ie.



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

# The SESAME login page is displayed:

# Science Foundation Ireland (SFI) SESAME support is available weekdays between 9AM-5:30PM (Dublin local time). Support tickets can be raised by clicking the Support "quick link" on your Workbench. If you are having login issues, please click "Forgot Password?". If the issue persists please contact sesame@sfi.ie. Password: Enter Email: Enter Email: Password: Login Forgot Password? Please ensure: • To use Firefox, Internet Explorer or Chrome for optimum SESAME compatibility. • Pop-ups are ENABLED in your browser configuration. • To not use the browser BACK button when navigating SESAME.



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

# **Pop-up Blocker Detection**

If your browser has a pop-up blocker enabled, a warning message or banner may be displayed at the top of the SESAME login page, or once logged in. Consult the appropriate browser help facility in order to make the required changes to the browser settings.

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.



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.

#### Forget Password?

If you forget your password, click on the "Forget password?" link below the login button. Clicking this link and entering your email address will trigger an email to your email address with a new password.

In order to login you must:

Type your **full e-mail address** when prompted for your Username. Type your case-sensitive **password**. Click the **Login** button. (If you have forgotten your password, click on the "Forgot password?" link below the log in button).

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



The workbench is divided into a number of areas.



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.
- Documentation access to help files and policy documents...
- **Logout** logs you out from SESAME.

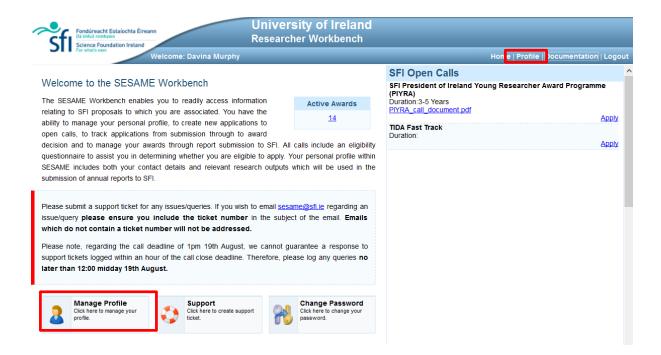
In these guidelines, we are concerned only with the Profile section of your workbench.

# **Updating your Profile**

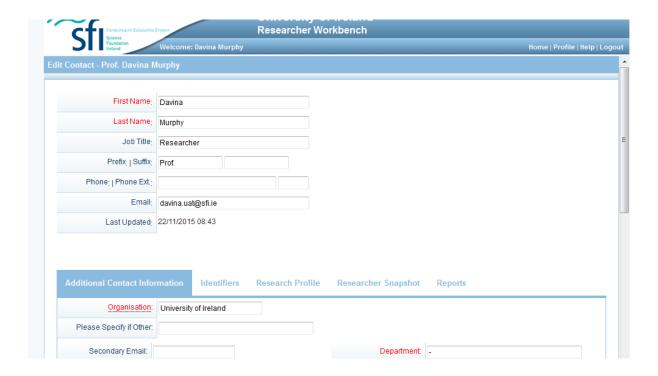
A very basic researcher profile will have been created by research office staff when they first add your contact details to SESAME.



- You 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 or Annual Progress Report without completing your profile but you should have completed the mandatory fields (shown in red) before submitting them for review.
- 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 (red boxes).



3. The Profile page is displayed.



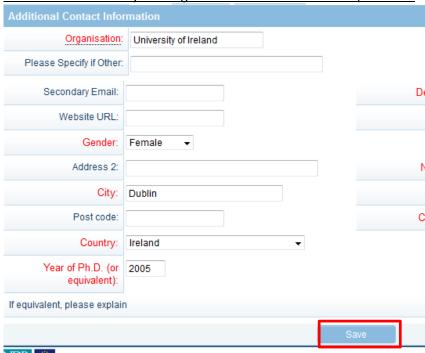
The profile screen consists of a Basic Contact Details section at the top of the page and a more detailed contact Information section below, which is divided into 5 tabs: Additional Contact Information, Identifiers, Research Profile, Researcher Snapshot and Reports.

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.

# **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.



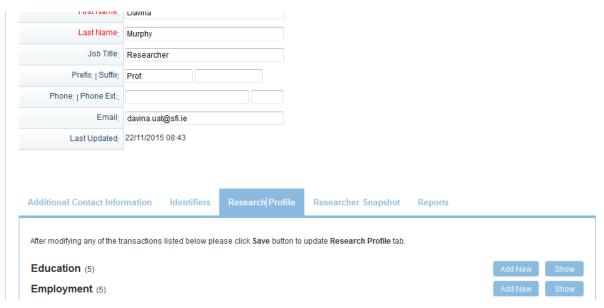
# 3. Click on Save



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

#### **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.



- 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

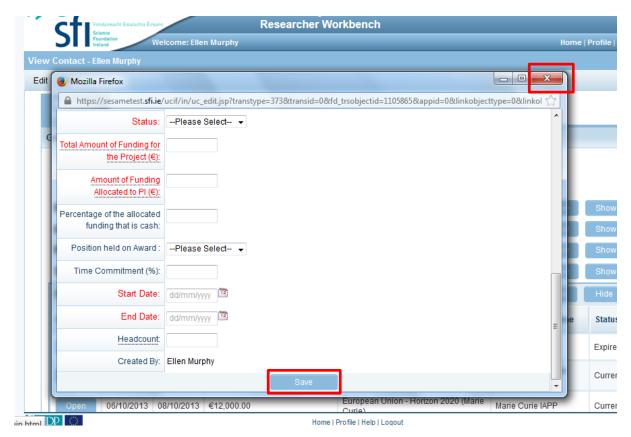
- Presentations
- Academic Collaboration
- Non Academic Collaborations
- Conferences / Workshops / Seminars Organised
- Outreach Initiatives
- SFI Funding Ratio
- Education and Public Engagement (EPE)
- Technical Reports

# 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 on 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.

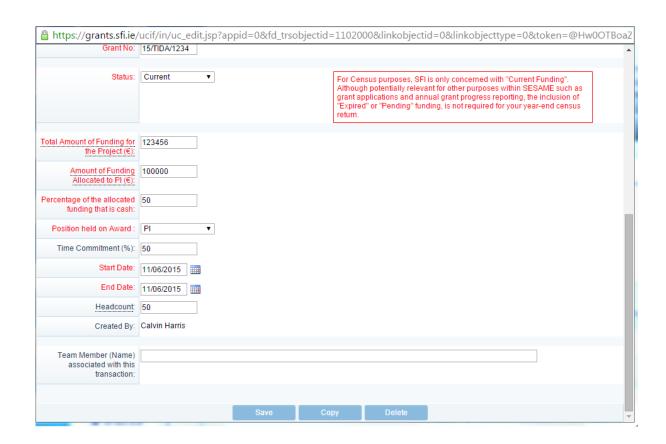
- 1. To view existing records, click on the **Show** button next to the Output / transaction type you wish to view. This will display a list of all records entered under this section.
- 2. To edit these records, click on the **Open** button next to the relevant record. This will open the record in a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



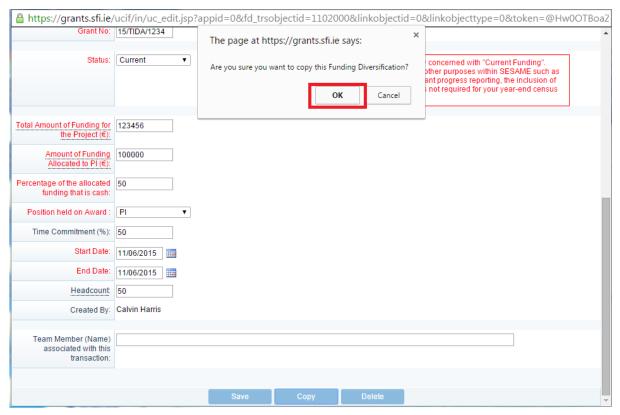
- 3. Update the relevant fields and click on **Save**.
- 4. Close the window.

# **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.



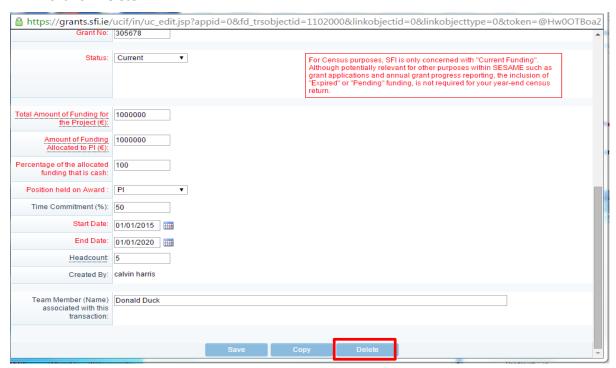
2. When prompted "Are you sure you want to copy this record?" click on **OK** 



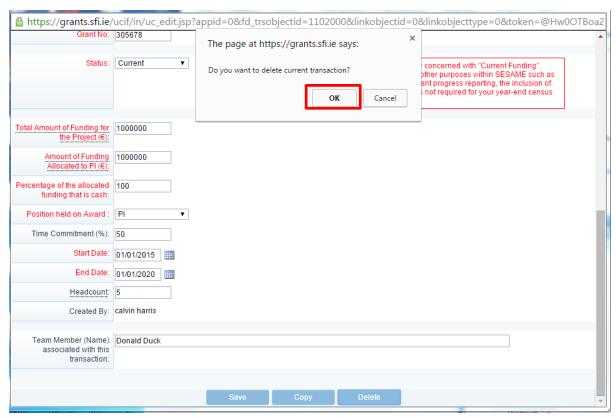
- 3. Make all the appropriate changes to the new record and click on **Save**.
- 4. Close the Window.

# **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



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



# **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.



- 2. This will display a list of all of the records of that particular output type, 100 records at a time.
- 3. If you have more than 100 records and you wish to display all records, click on Show All.



4. 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.



5. Close the window to return to your profile.

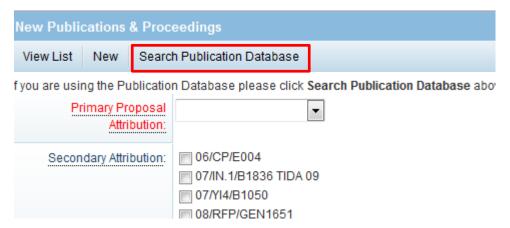
In addition to manually entering publications, there are alternative facilities within SESAME to import publications individually and in bulk from external sources.

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.

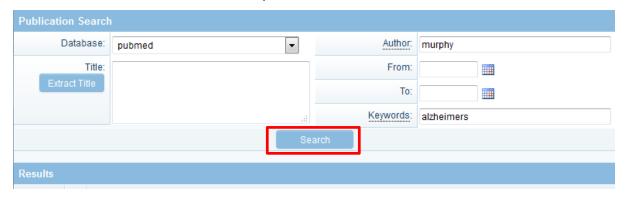
# **Importing from Pubmed**

To import publications from Pubmed:

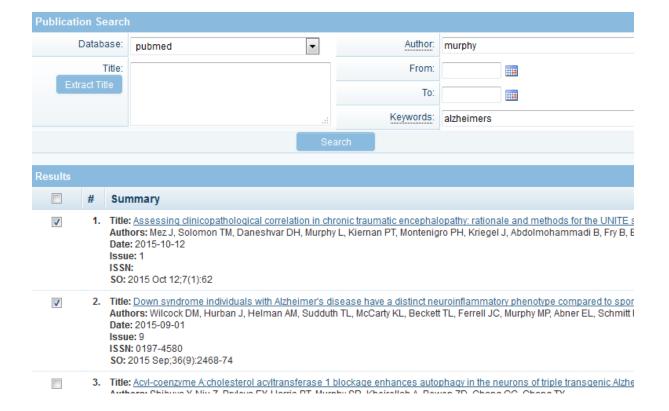
- 1. Open an existing publication or click on Add New.
- 2. Click on Search Publication Database



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



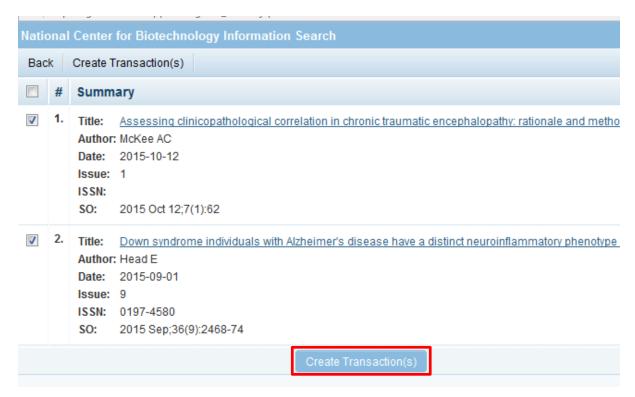
4. A list of publications satisfying the criteria entered will be returned (20 results per page). Click on the check boxes next to the publications that you want to import from the first page of results.



# 5. Scroll down and click on Add



# 6. Click on Create Transactions



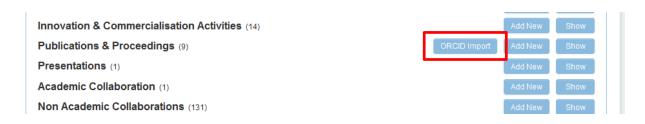
- 7. The records will be added and the window will close, bringing you to a list of your current publications. Close the list to return to your profile. To refresh the view and see the new records on your profile, click on Save.
- 8. The records will be visible on your profile. The record will be marked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

		VISUAI FIESEIIIAIIUII				
Open	2015	Assessing clinicopathological correlation in chronic traumatic encephalopathy: rationale and methods for the UNITE study.	Alzheimer's research & therapy	10.1186/s13195-01 5-0148-8	Record Incomplete	180706
Open	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.neurobiola ging.2015.05.016	Record Incomplete	180707
		Llos of optibiotics in	The Veterinery		Decord	

# **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.

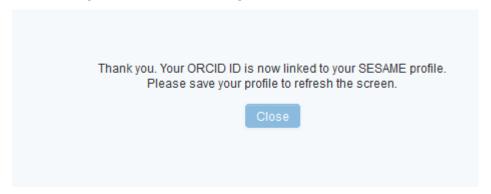
1. From the Research Profile tab click on the ORCID Import button next to the Publications & Proceedings output type.



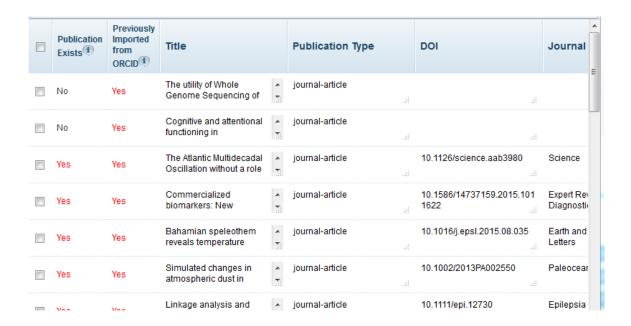
2. This will open a new ORCID window.



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

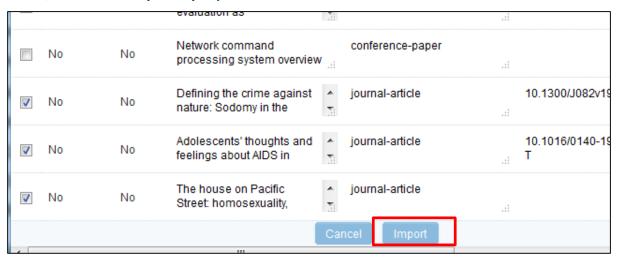


- 5. Click on Close, then save your profile.
- 6. Now click on the ORCID Import button again beside the Publications & Proceedings and this will display a list of the publications listed on your ORCID account.

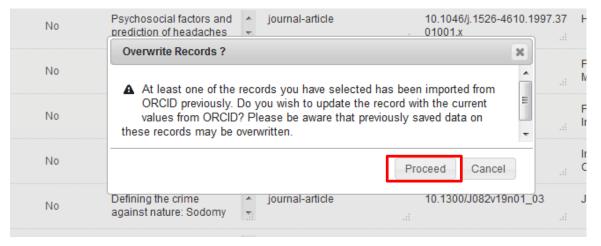


- 7. If a publication is already on your profile, it will be flagged with a red "Yes" under the Publication Exists (if there is a record with this DOI on your profile) or Previously Imported from ORCID (if you have previously imported the record from ORCID details are in the right most column of this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

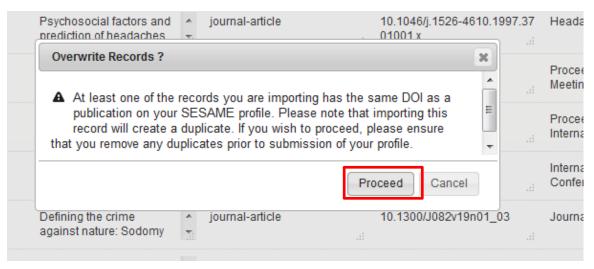
NOTE: As your ORCID records do not contain all the information required on SESAME, you will need to return to the records in SESAME once imported to complete the relevant fields. You will not be able to submit your profile until these records are complete. For this reason, we advise that you only import relevant records.



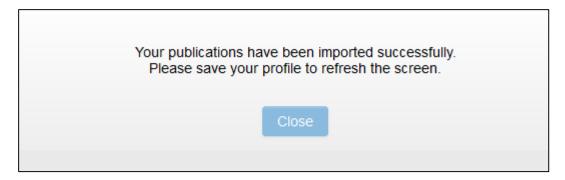
9. If you select a record that already exists on your profile, you will get a caution.



- 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.



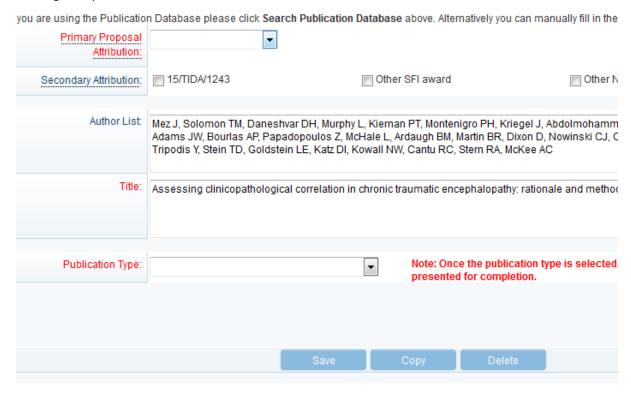
- 12. If you click on Proceed, this will create a duplicate record on your profile. Please ensure to remove any duplicates prior to submission. Otherwise, click on Cancel and uncheck any items you do not wish to re-import. Then click Import again.
- 13. The checked records will be imported.



14. Save your profile to refresh the publication list.

# **Completing Imported Records**

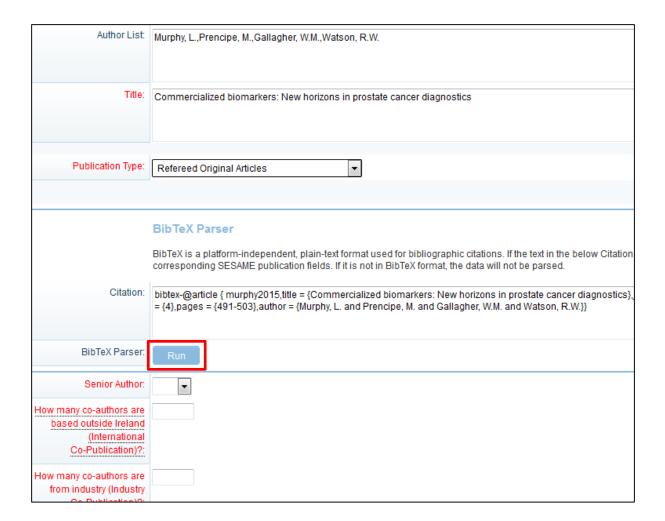
1. When records are imported from external sources, only certain fields imported, depending on the source data, so the record will be flagged as incomplete. Add any remaining data by clicking on Open.



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.

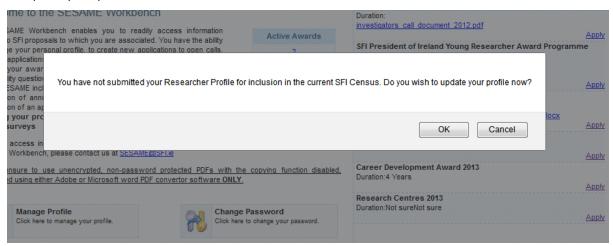


# **Overview of the Census Submission Process**

Although your research profile can be completed at any time of the year, SFI requires that researchers submit their profile to SFI during the Census submission period (usually from the start of December to the end of January). To faciliate and encourage this, there are some changes to your profile during this period, including an option to submit your profile to SFI. By submitting your profile you are confirming that your profile is up to date with all outputs attributable to your research.

# **Logging on During the Census Period**

During the Census period, when you log in to SESAME, you will be reminded that you have to complete your profile.

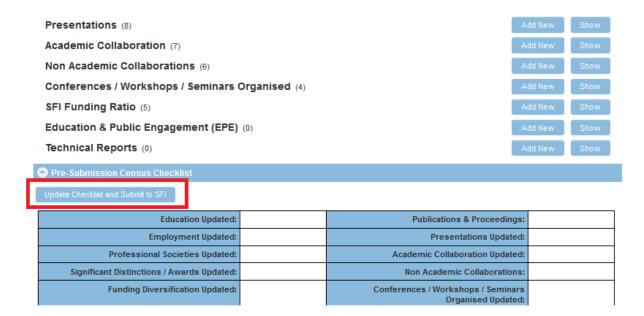


This message will appear upon log in throughout the Census period until you submit your profile. By clicking on **OK** you will be brought directly to your profile where you can complete your contact and research details. Clicking cancel will close the dialog box and you can return to your main home screen.

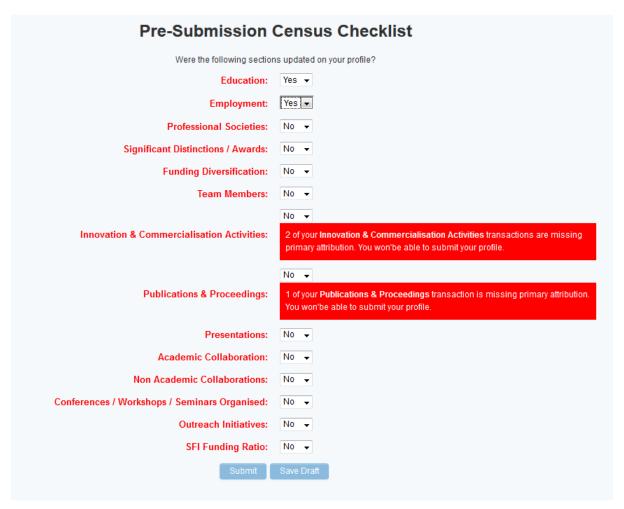
# **Completing your Profile During the Census Period**

During the Census period, when you open the Research Profile to complete your research history and outputs, in addition to being able to enter your profile information, you will now be able to complete a Census submission checklist and Submit your profile.

- 1. Update your research profile following instructions in modules 2 and 3.
- 2. At the bottom of the Research Profile Section of your profile, click on **Update Checklist and Submit to SFI**



- 3. The following checklist will show. (Note: You will still have an opportunity to carry out further updates to your profile prior to submission to SFI).
- 4. You can use this pre-submission census checklist to keep track of what sections of the profile you have completed and what's outstanding. For each section, you should select Yes / No / NA from the drop down list. (Yes = section updated; No = section not yet updated; NA = No update required). You will not be able to submit your profile if any of these sections are flagged as No.



- 5. The checklist highlights in red if there are entries under a given section where mandatory fields have not been completed. You will not be able to submit your profile if these records are not completed.
- 6. If you have incomplete records or if you need to carry out further updates to your profile, click on **Save Draft** to save your checklist entries.
- 7. Close the checklist window.
- 8. Continue to update your profile.
- 9. Repeat from step 1, until you are ready to submit.
- 10. On your checklist, click on Submit.