Host Institution Administrator Guide

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Learning Objectives

In this session, you will learn:

- Who is a HI Admin
- HI Admin roles and responsibilities
- How to viewing institution profile
- How to updating institution profile
- How HI Admin add users in IGMS
- How HI Admin remove users from IGMS
- How HI Admin change role in IGMS
- How HI Admin approves users in IGMS

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Definitions, Acronyms and Abbreviations

Sl. No	Abbreviation / Acronyms	Definitions
1	PI	Principal Investigator
2	PM	Programme manager
3	HI	Host Institution
4	HI ORE	Host Institution Office of Research
5	DOR	Director of Research
6	AI ORE	Academic Institution Office of Research
7	AI Dean	Academic Institution Dean
8	HI Finance	Host Institution Finance
9	HI HR	Host Institution Human Resources
10	RGO	Research Grant Office

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Who is a HI Admin?

- HI Admin is a person appointed by the Host Institution to manage the IGMS users of the Host Institution

- HI Admin can be the same person or different person from Corppass Admin

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Roles and responsibilities of HI Admin in IGMS

RGO	HI Admin	Principle Investigator, ORE, DOR, AI ORE, AI Dean
RGO user is from the **funding agency**	HI Admin user is from the **Host Institution**	Principle Investigator, ORE, DOR, AI ORE, AI Dean is from the **Host Institution**
RGO **creates** Host Institutions in IGMS	HI Admin **maintain** institution profile in IGMS	
RGO creates and assigns **1 person** from the Host Institution as the HI Admin	HI Admin assigns ORE, DOR, AI ORE, AI Dean and HI Admin roles for the Host Institution *	The system **automatically** assigns Principle Investigator role to all users registering in the system
	HI Admin **approves** users where multiple Host Institutions share the same UEN number	
	HI Admin **manages** all the users in the Host Institution	

To Note

* All users must register in the system before HI Admin can assign the roles

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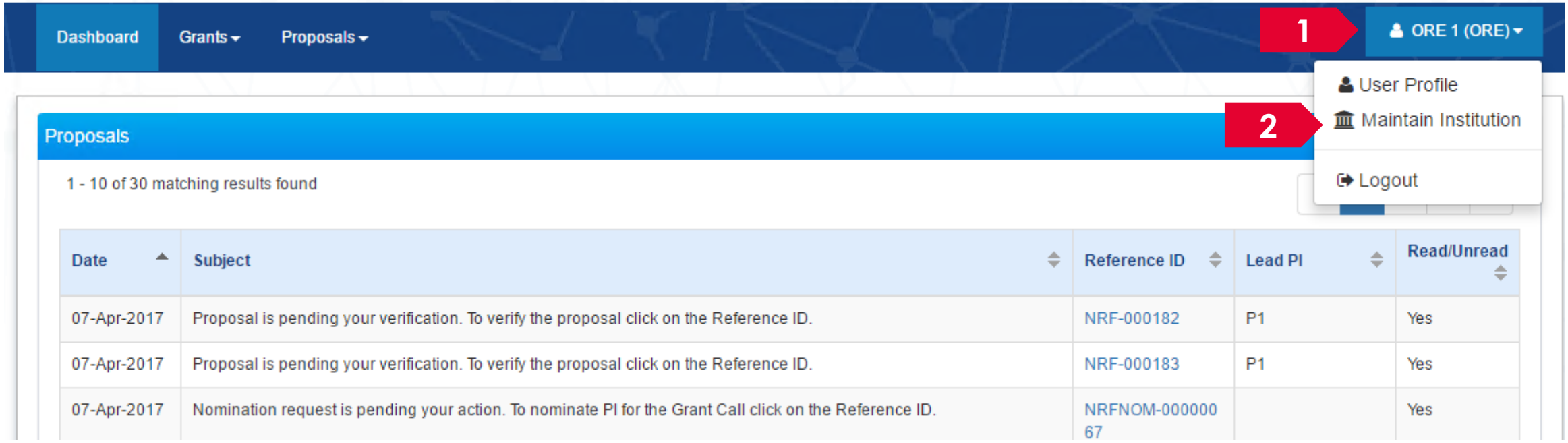
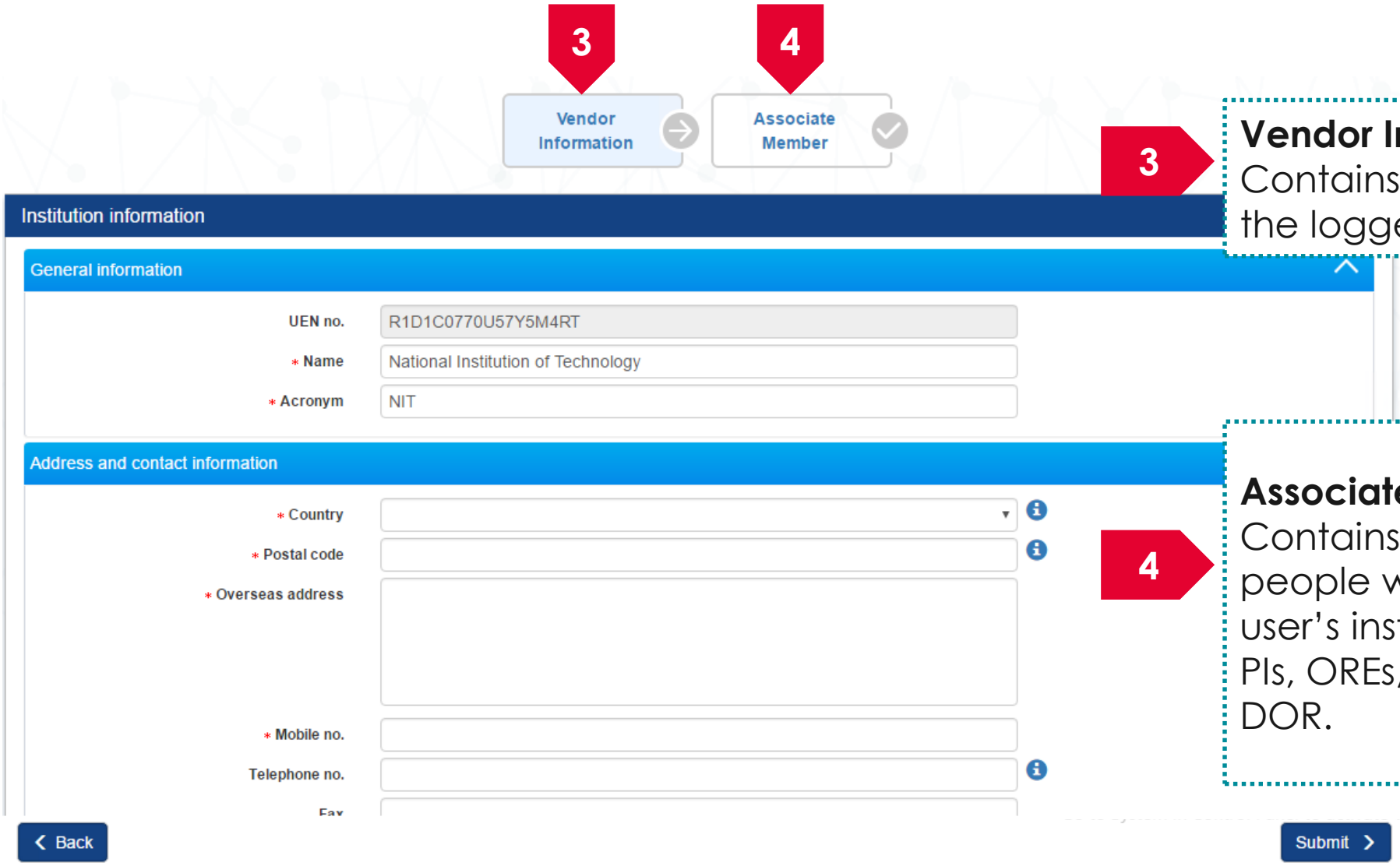
Viewing Institution Profile in IGMS – 1



1 Click on the **name** which is displayed on the top right hand corner of the screen

2 Click on the **Maintain Institution** link

Viewing Institution Profile in IGMS – 2



3

Vendor Information screen:
Contains the institution details of the logged in user.

4

Associate Member screen:
Contains the details of all the people who have access to the user's institution. The list will include PIs, OREs, DORs, AI OREs and AI DOR.

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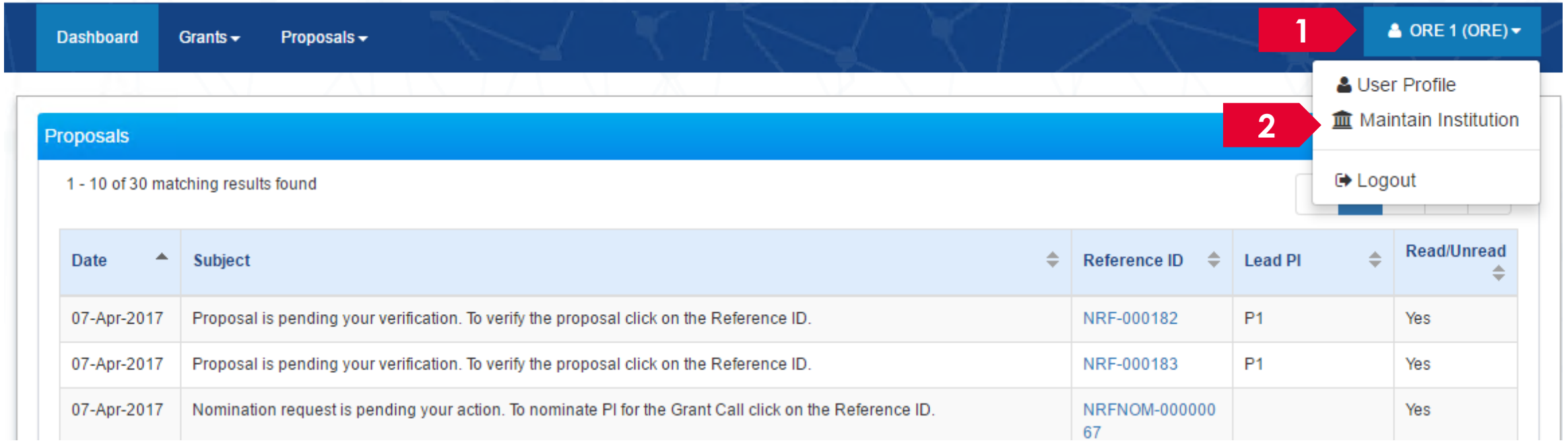
Updating Institution Profile in IGMS – 1



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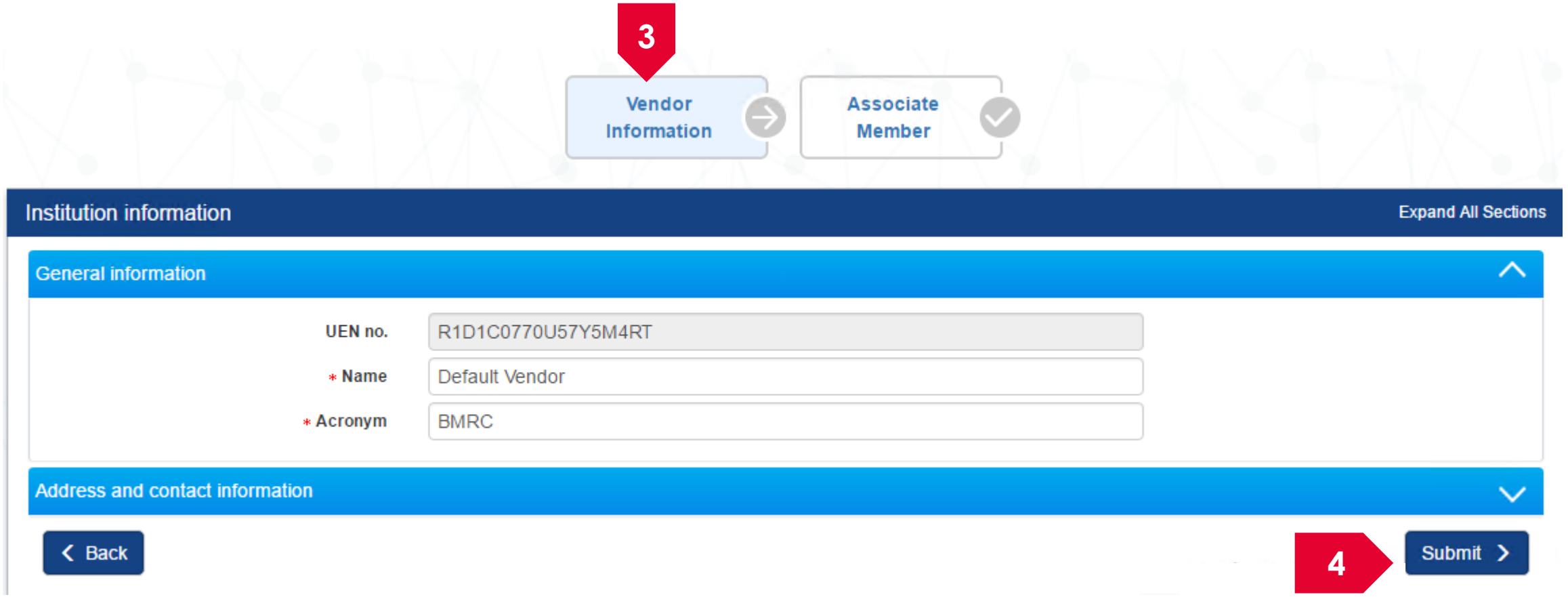
Updating Institution Profile in IGMS – 2



3 Fill up the Vendor Information page.
Note: All the mandatory fields must be filled up.

4 Click on **Submit** button to update the profile.

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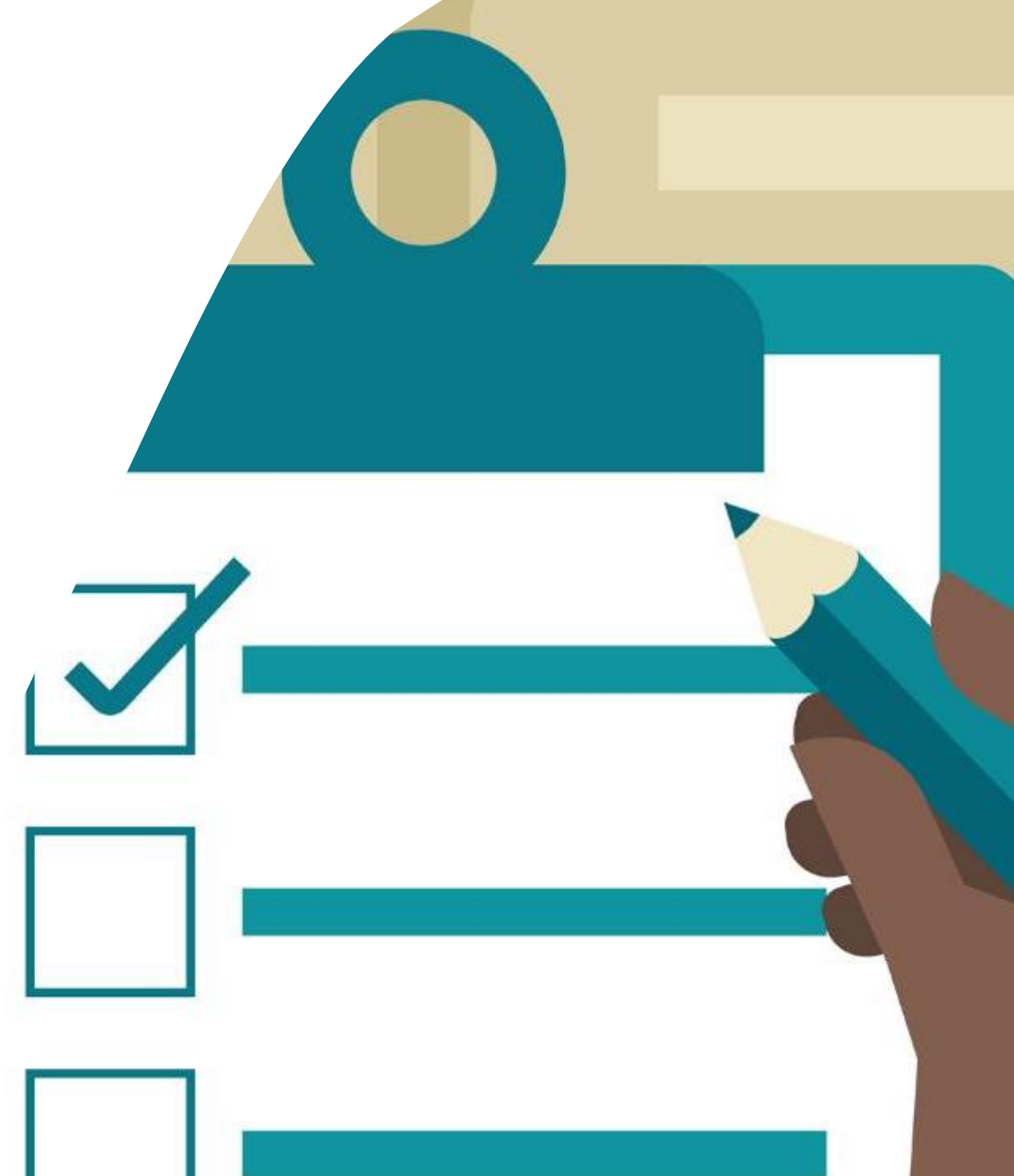

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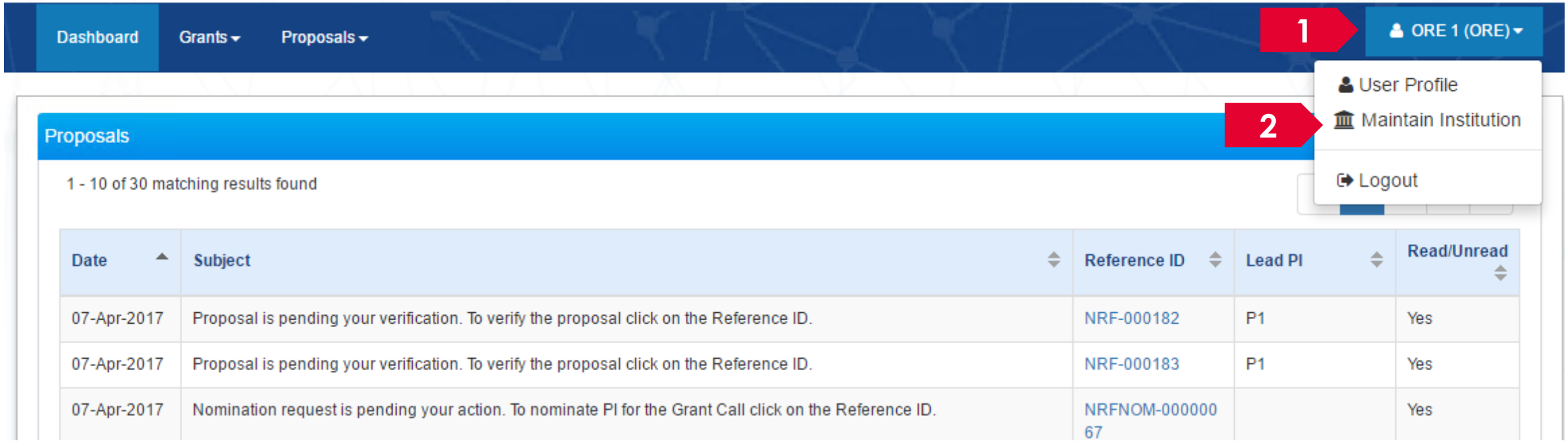
Adding users into IGMS – 1



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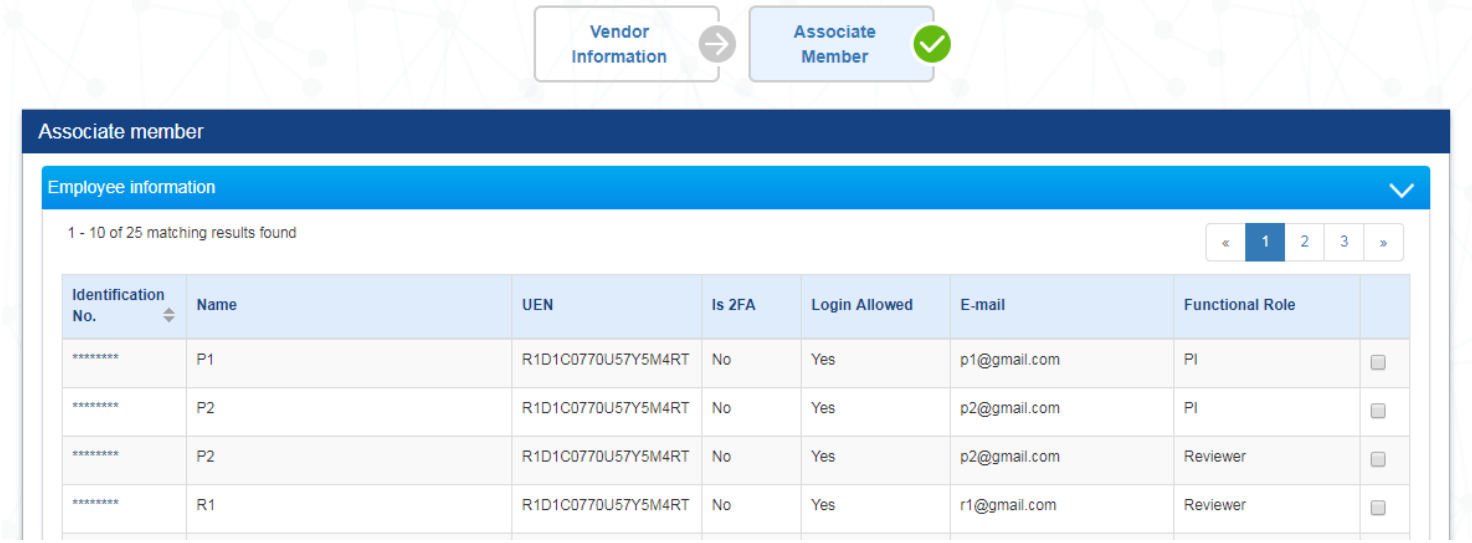
Adding users into IGMS – 2

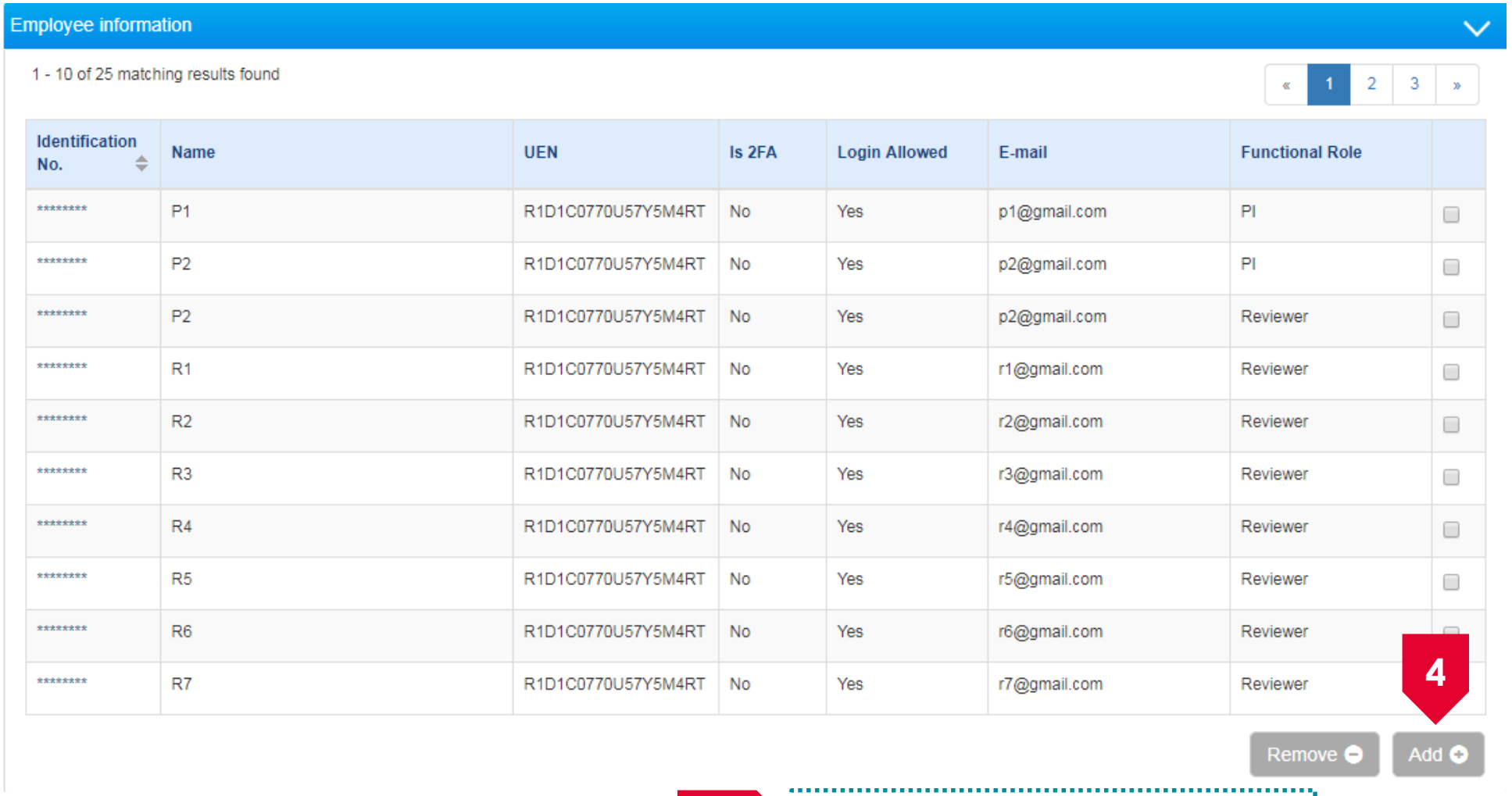


3 Click on the **Associate Member** Screen

To Note

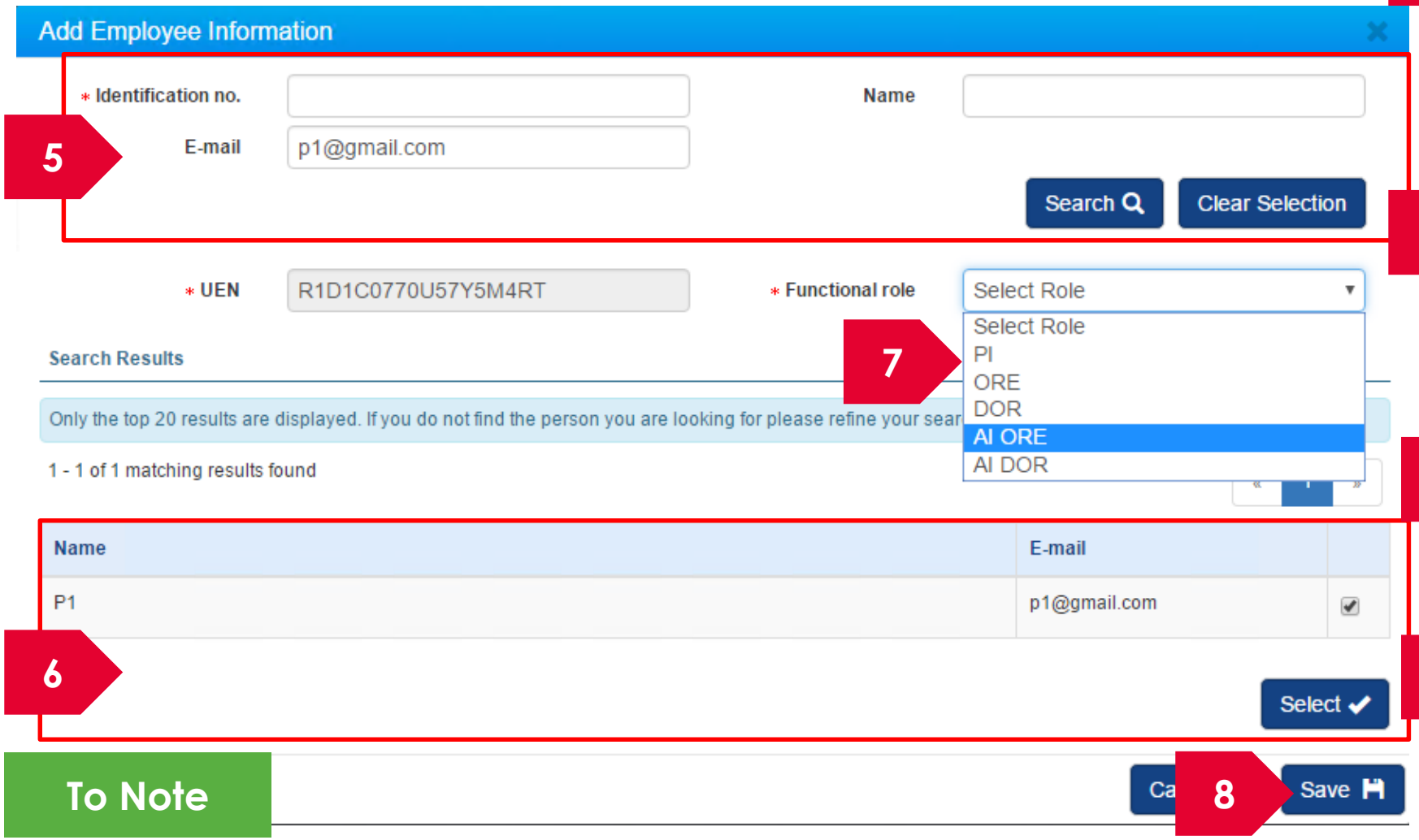
The Associate Member screen displays all the users who currently have access to the institution in IGMS

Adding users into IGMS – 3



4 Click on Add button

Adding users into IGMS – 4



5 Search for the user using Identification Number, Name or Email. Click **Search**

6 Select the user by clicking on the **checkbox** and click **Select**

7 Choose the functional role

8 Click on **Save**

To Note

Only the top 20 results are displayed. If the person is not found then refine the search using identification number or email address.

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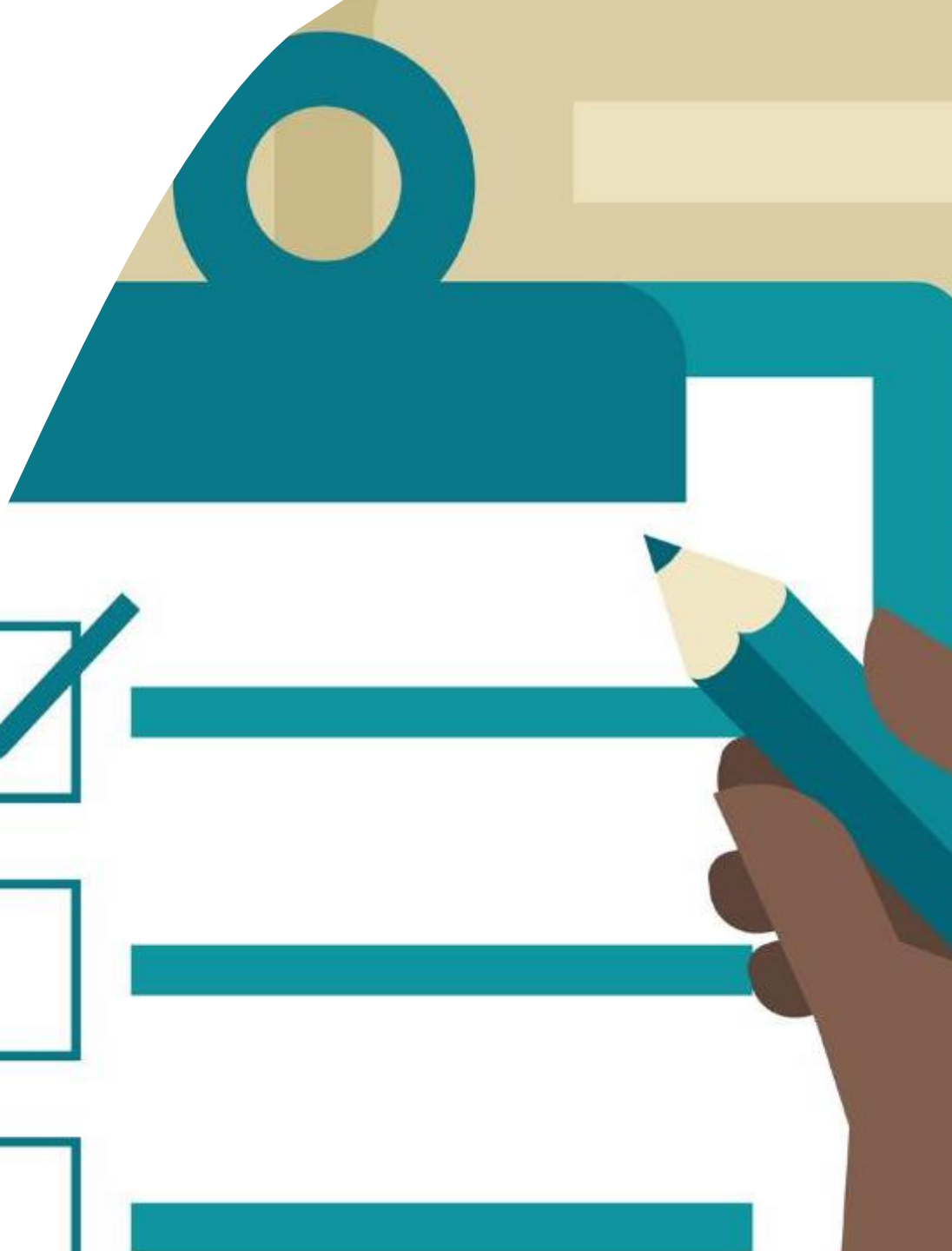

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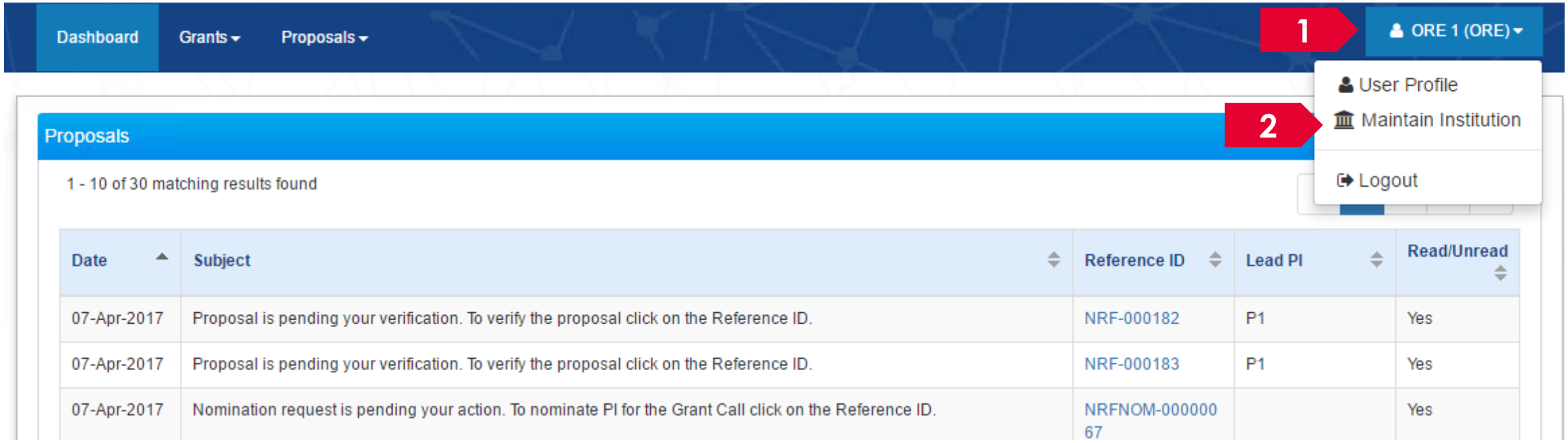
Removing users from IGMS (Option A) – 1



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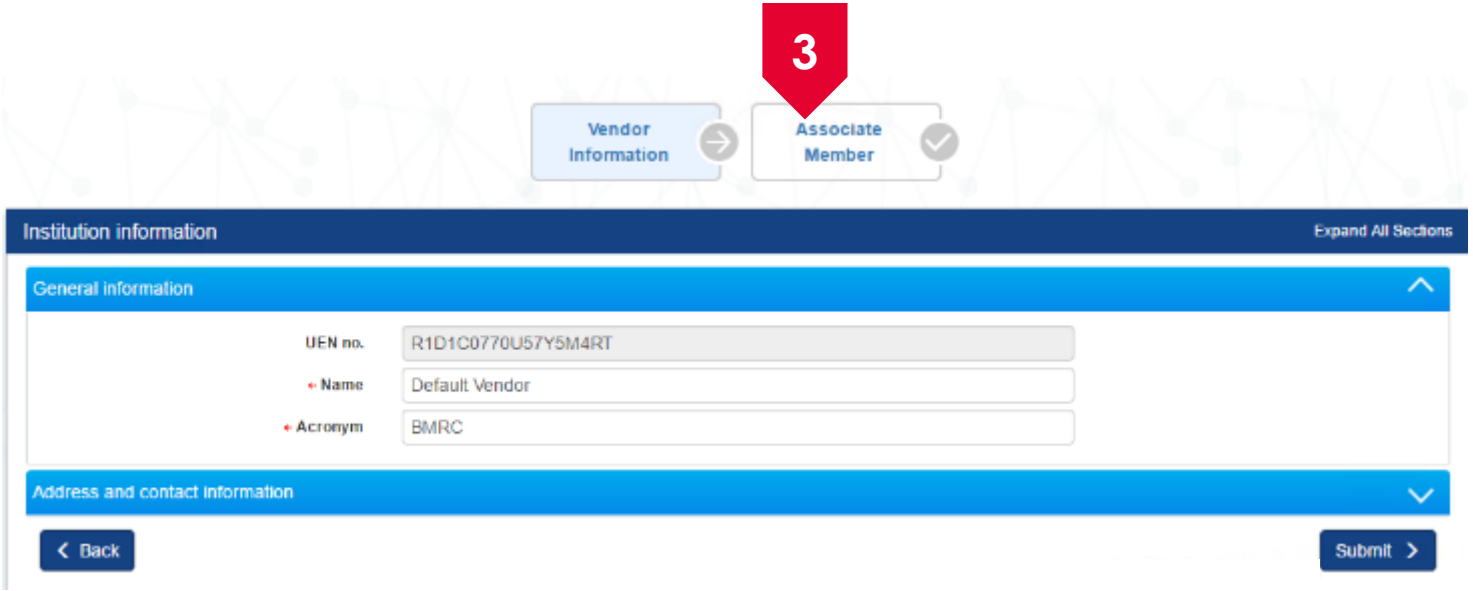
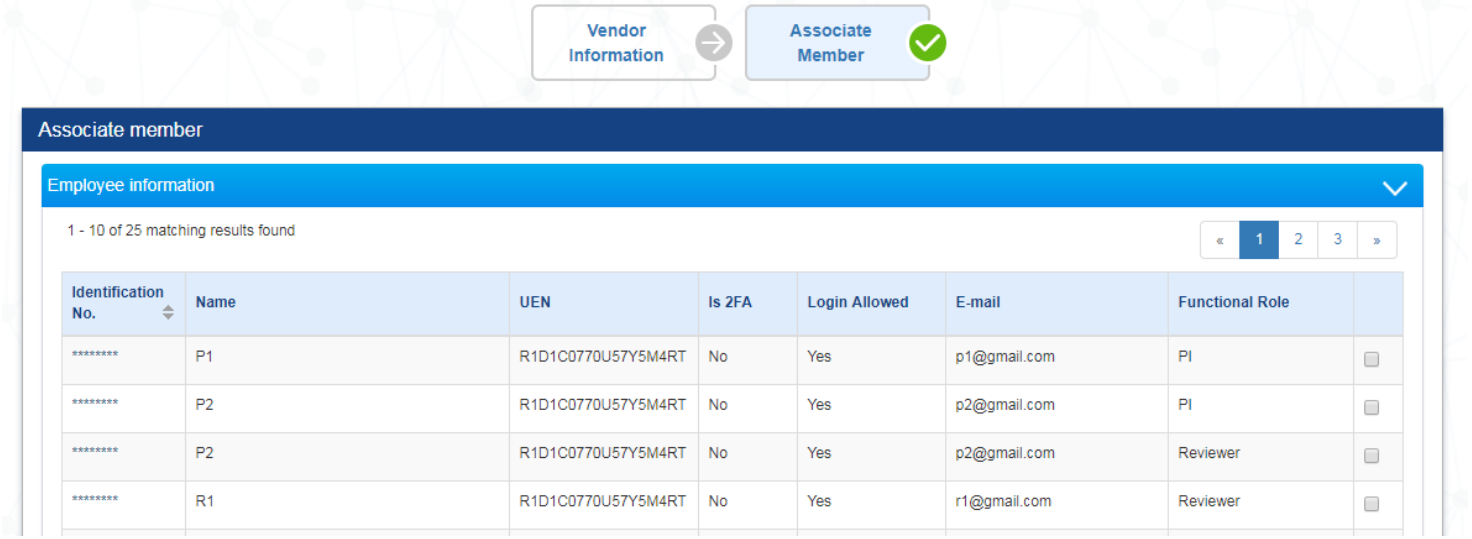
Removing users from IGMS (Option A) – 2





3

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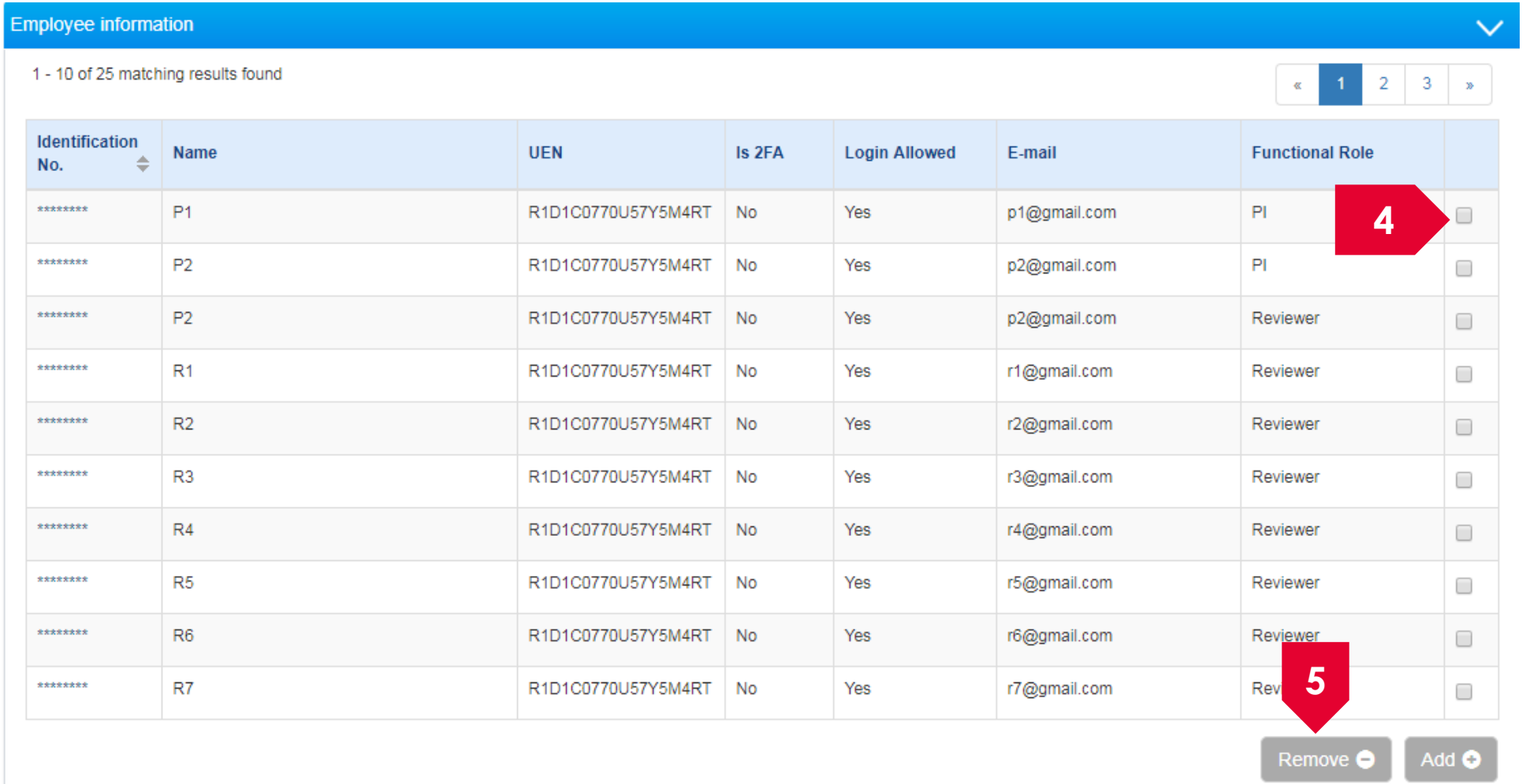
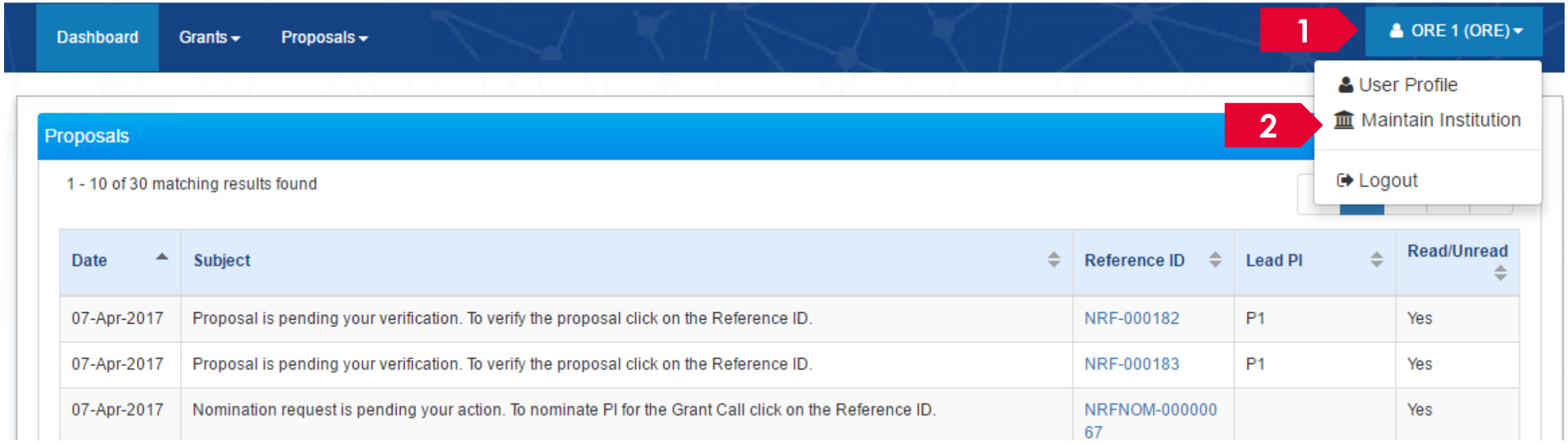
Removing users from IGMS (Option A) – 3



4 Select the user to remove

5 Click on Remove button

Removing users from IGMS (Option B) – 1



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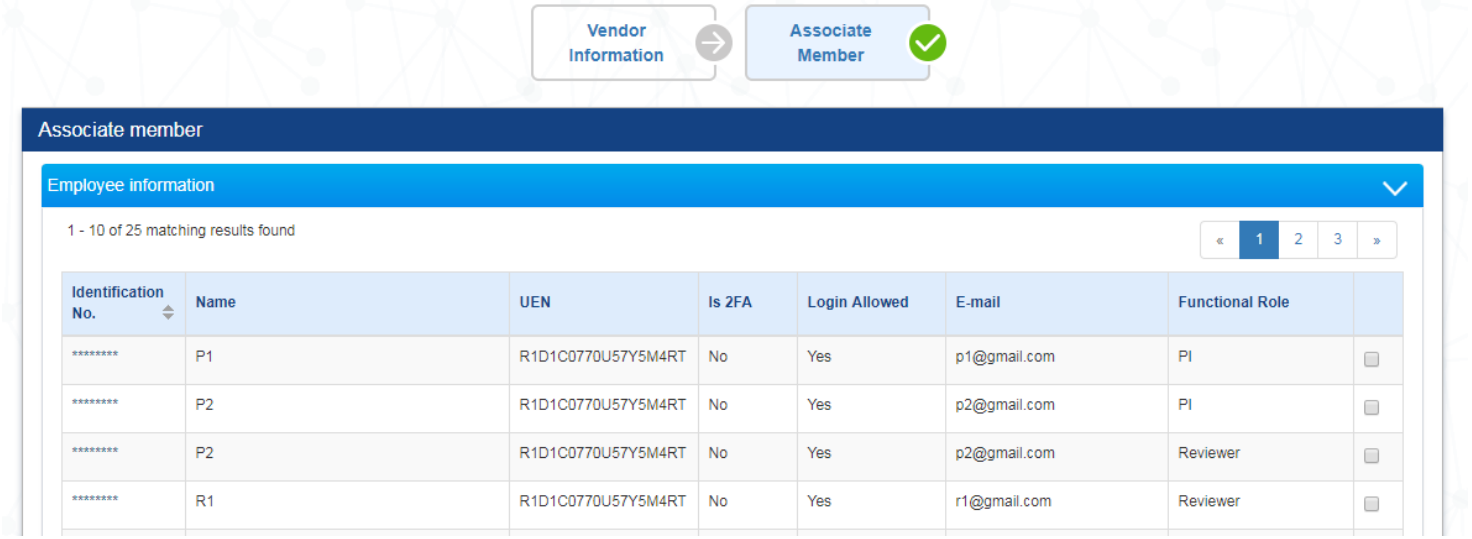
Removing users from IGMS (Option B) – 2



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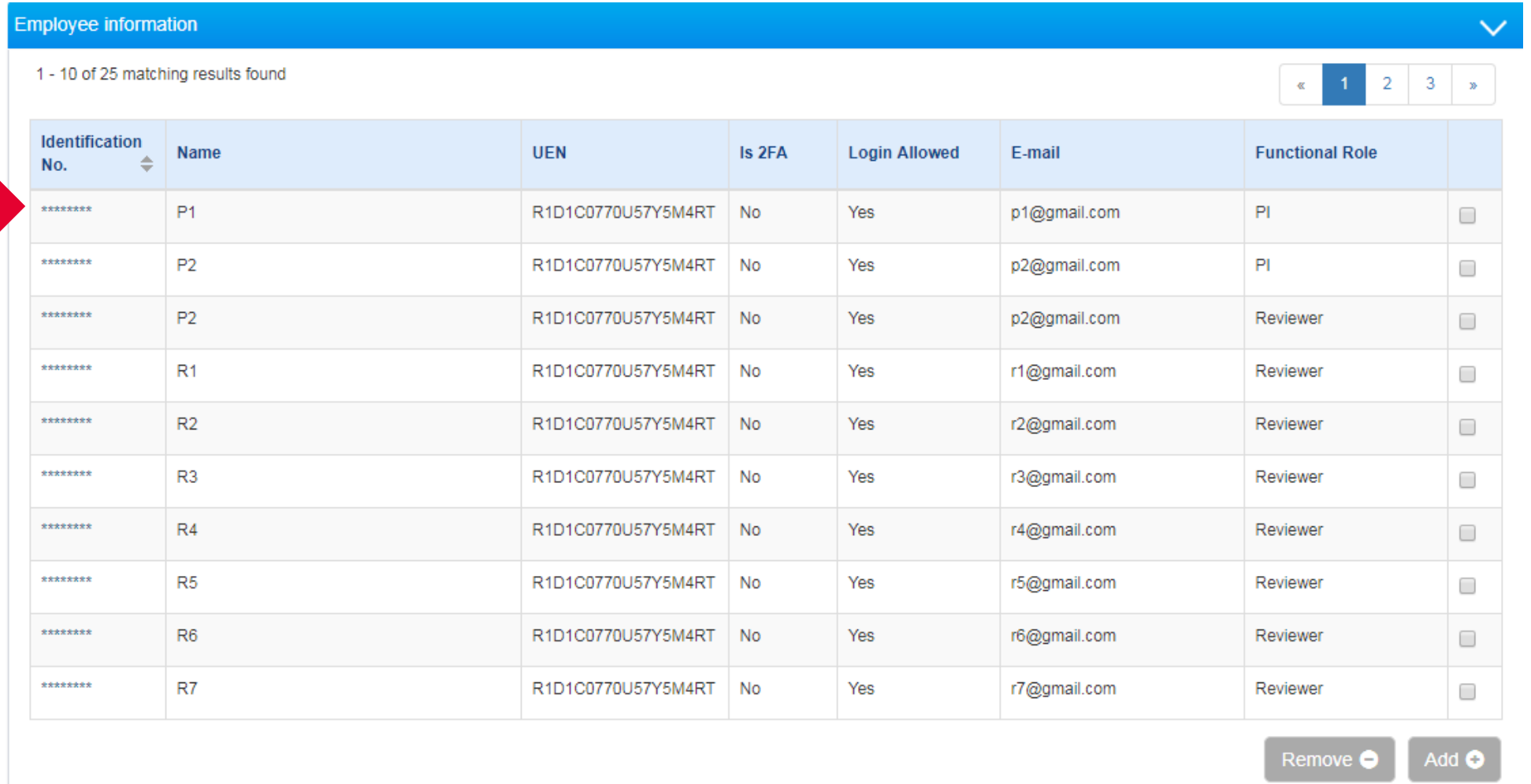
Removing users from IGMS (Option B) – 3



4

4

Click on the **Identification no**

Removing users from IGMS (Option B) – 4

5 Set the Login Allowed field as **No**

6 Click on the **Save** button

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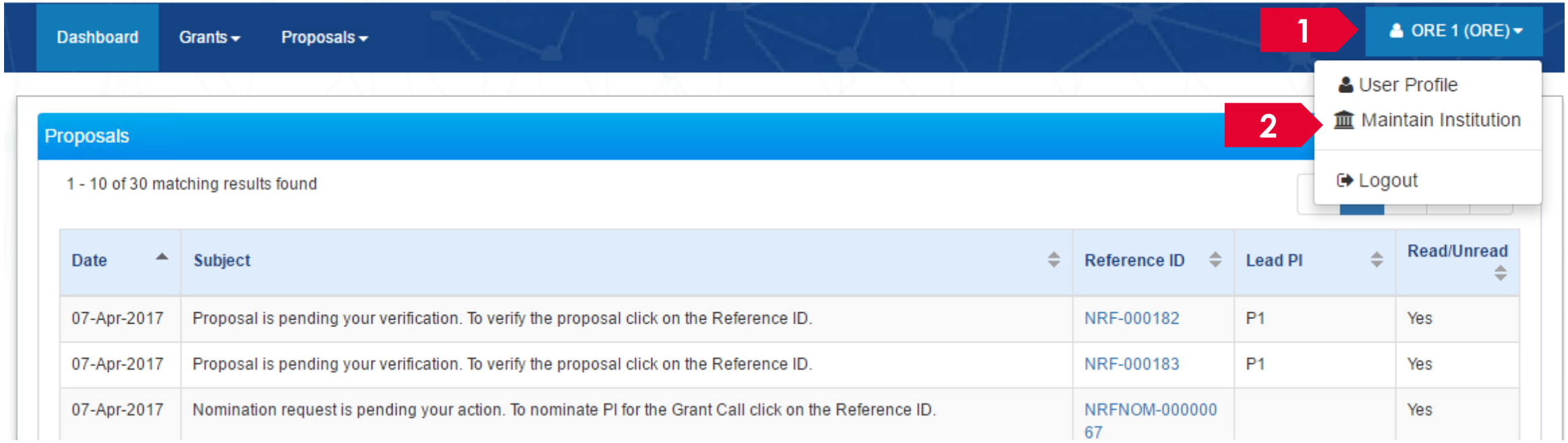
Changing user roles in IGMS – 1



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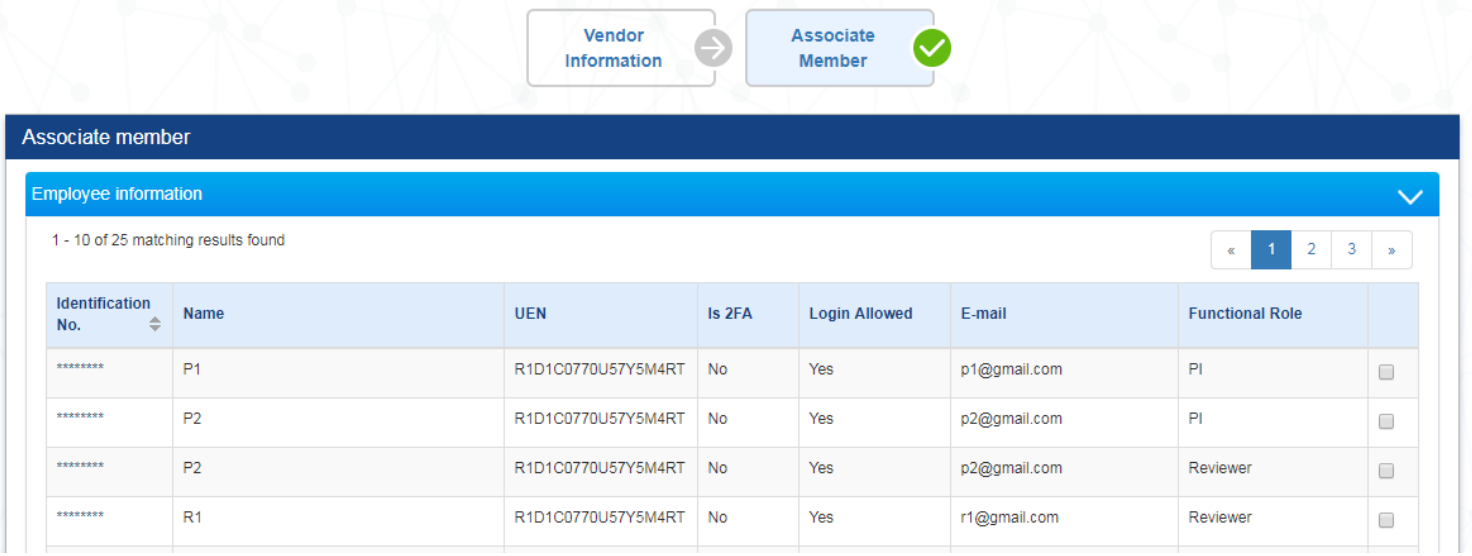
Changing user roles in IGMS – 2



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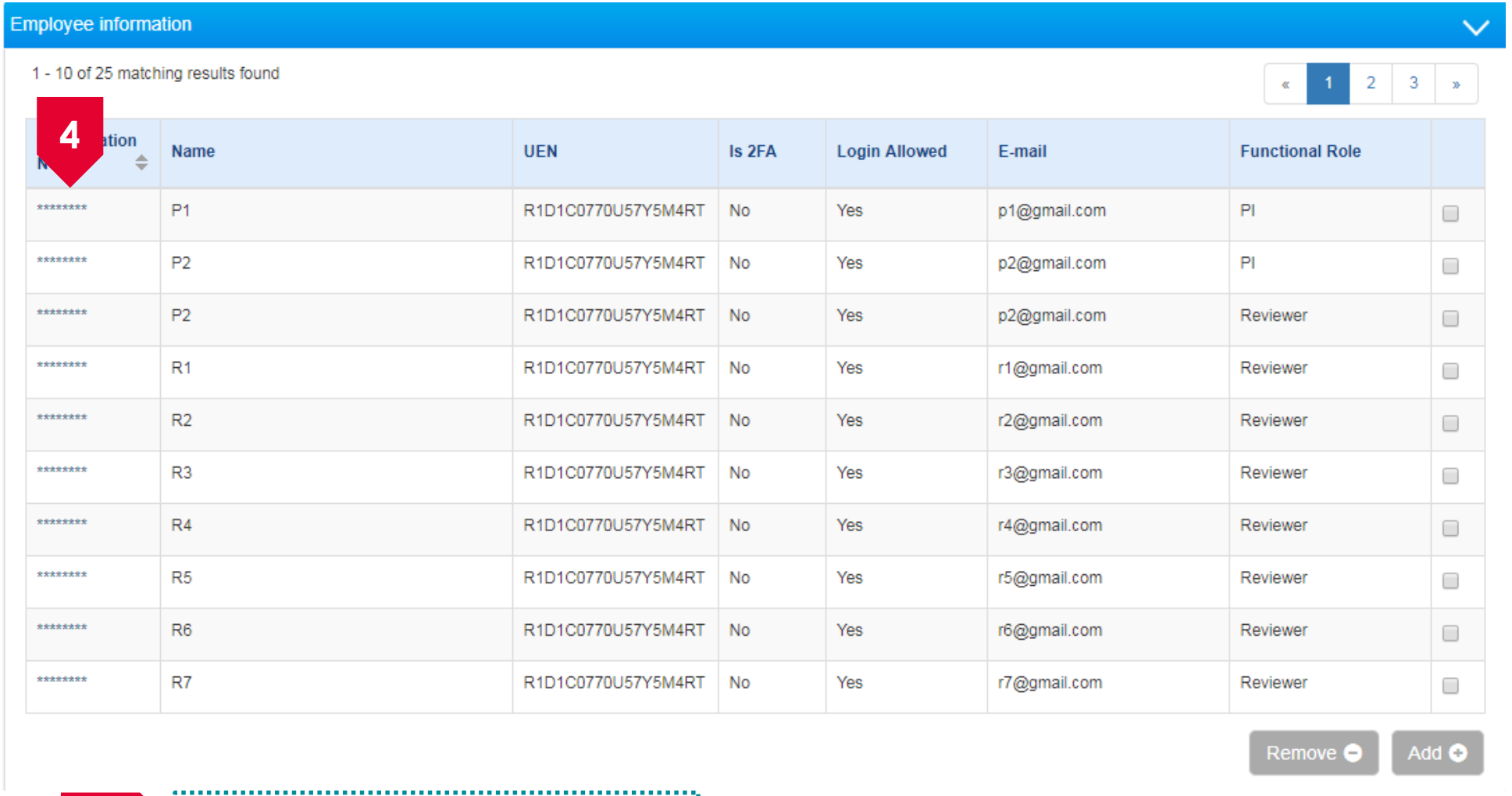
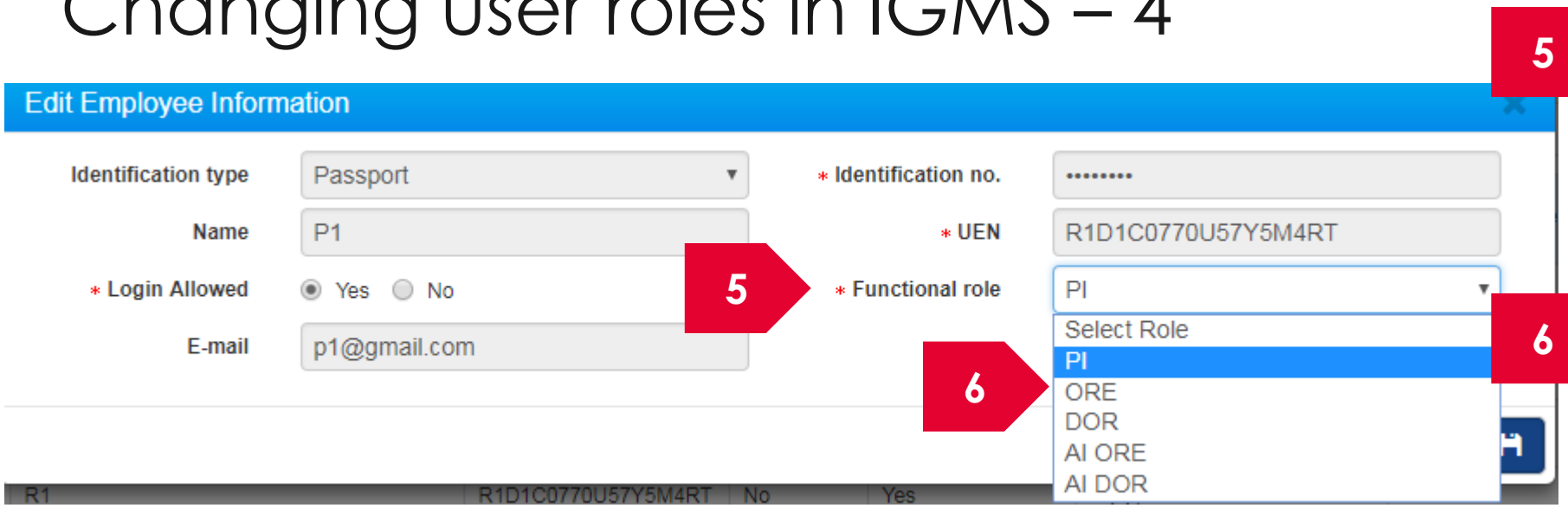


4 Click on the hyperlink

Changing user roles in IGMS – 4

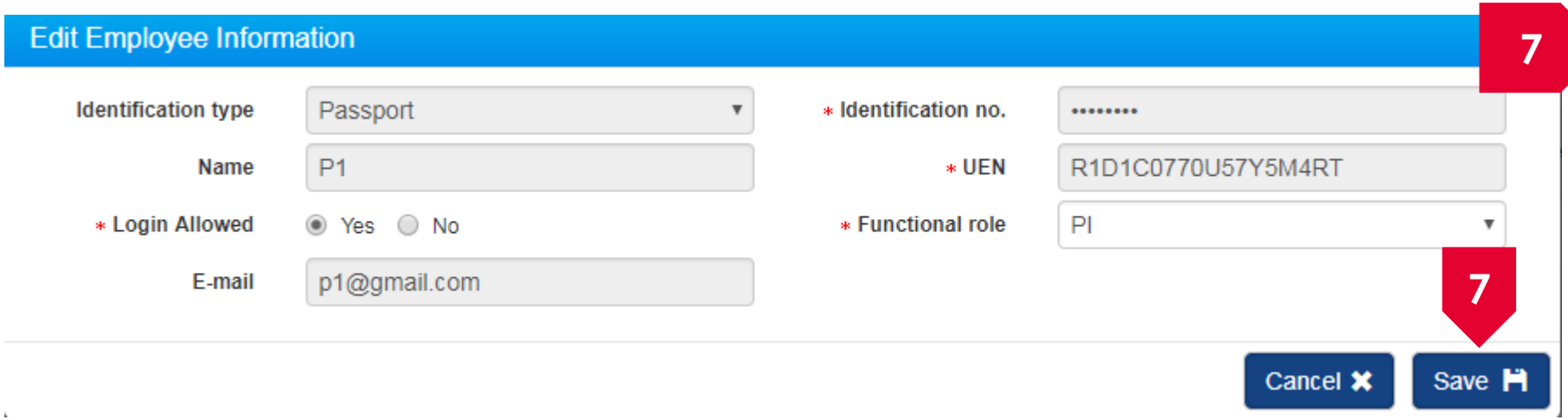


5

Click on **Functional Role**

6

Select the Role



7

Click on **Save**

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Things to take note

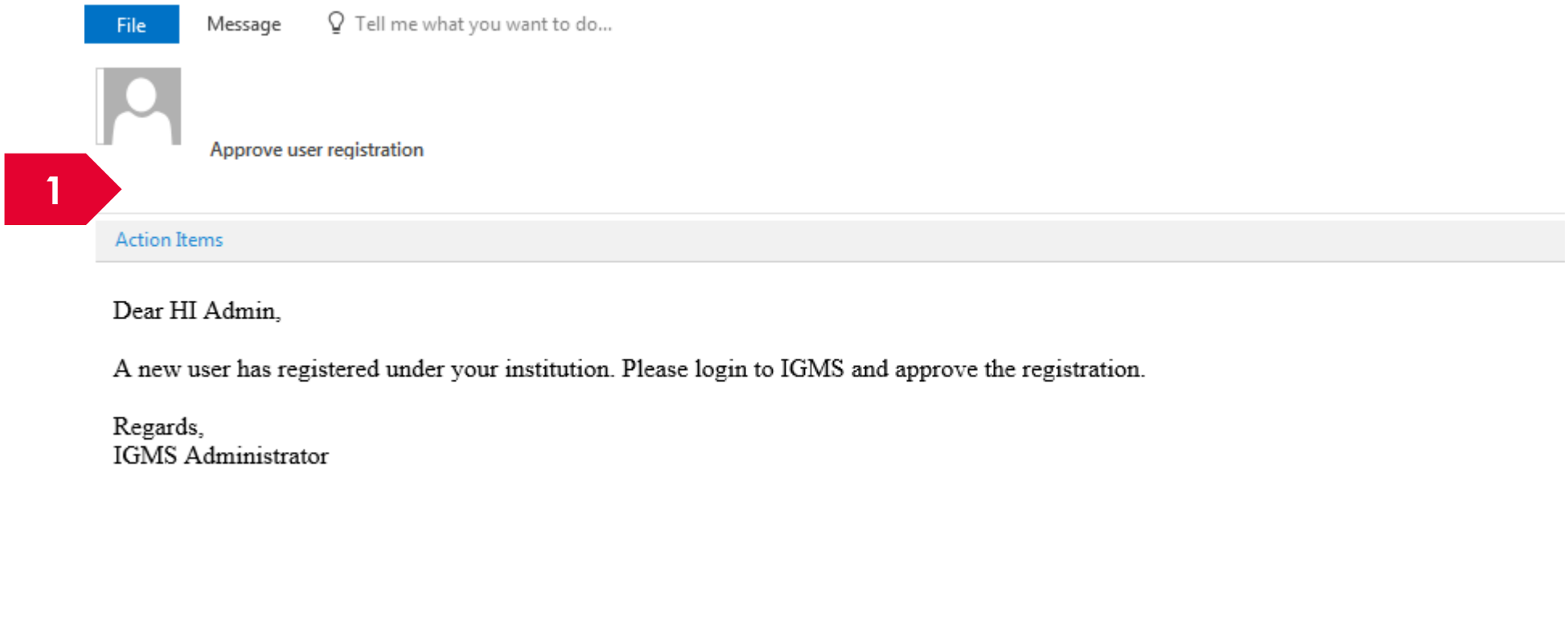
1. Users whose Host Institution shares the same UEN as another Host Institution will require HI Admin approval before they can access IGMS

2. Users will be prompted to choose the Host Institution when system detects that the UEN is shared with another Host Institution

3. Use this function when users Host Institution shares the same UEN as another Host Institution

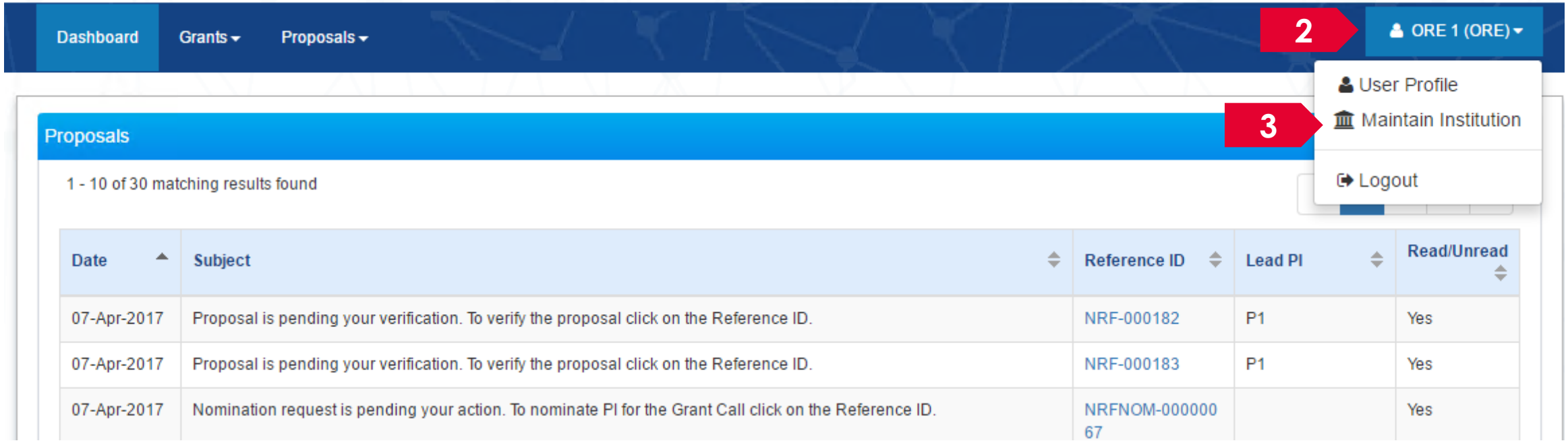
4. HI Admin will be notified via email when users register in IGMS

Approve user in IGMS – 1



1 An email would be send to the HI Admins when users registers in IGMS

Approve user in IGMS – 2



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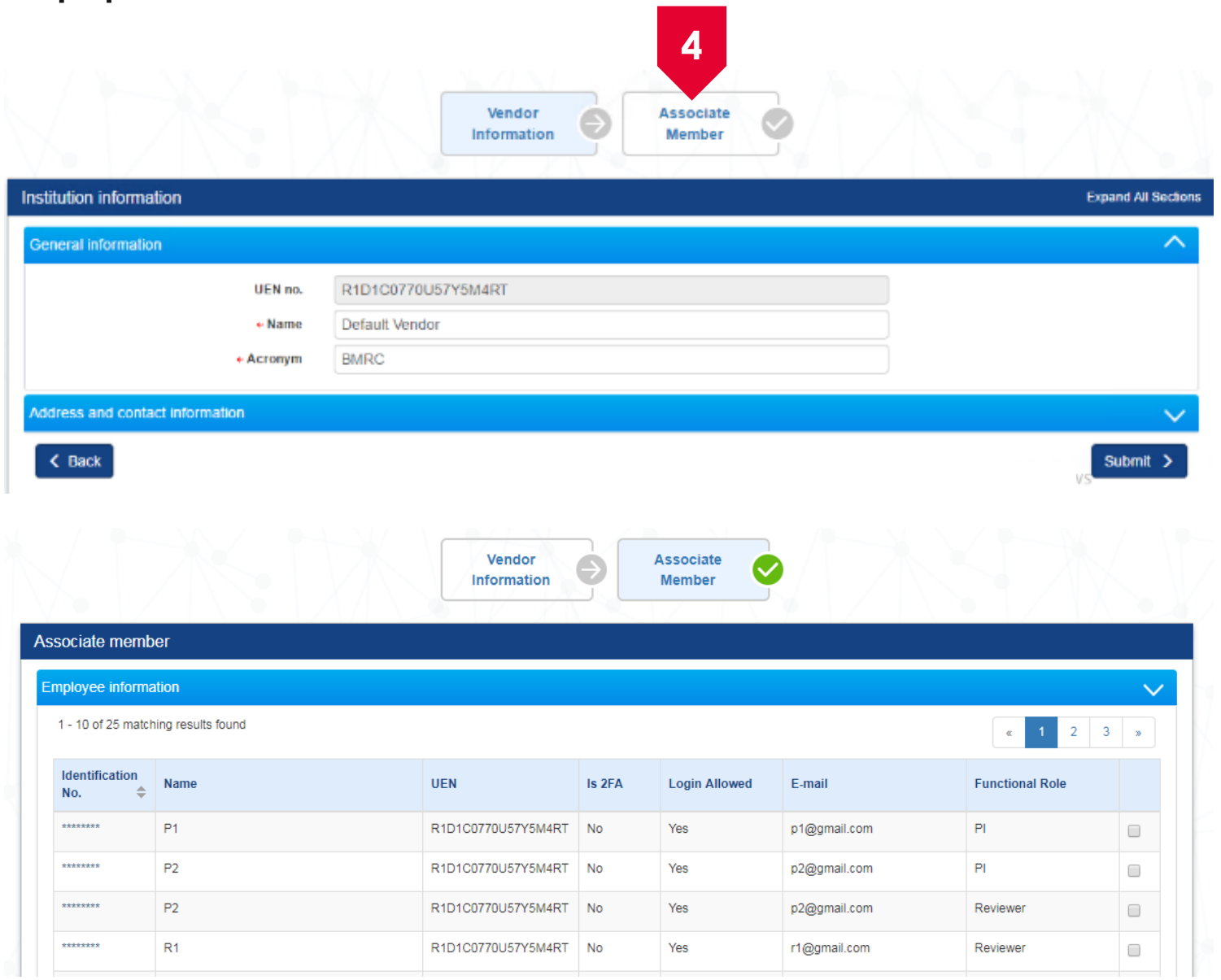
Approve user in IGMS – 3



4

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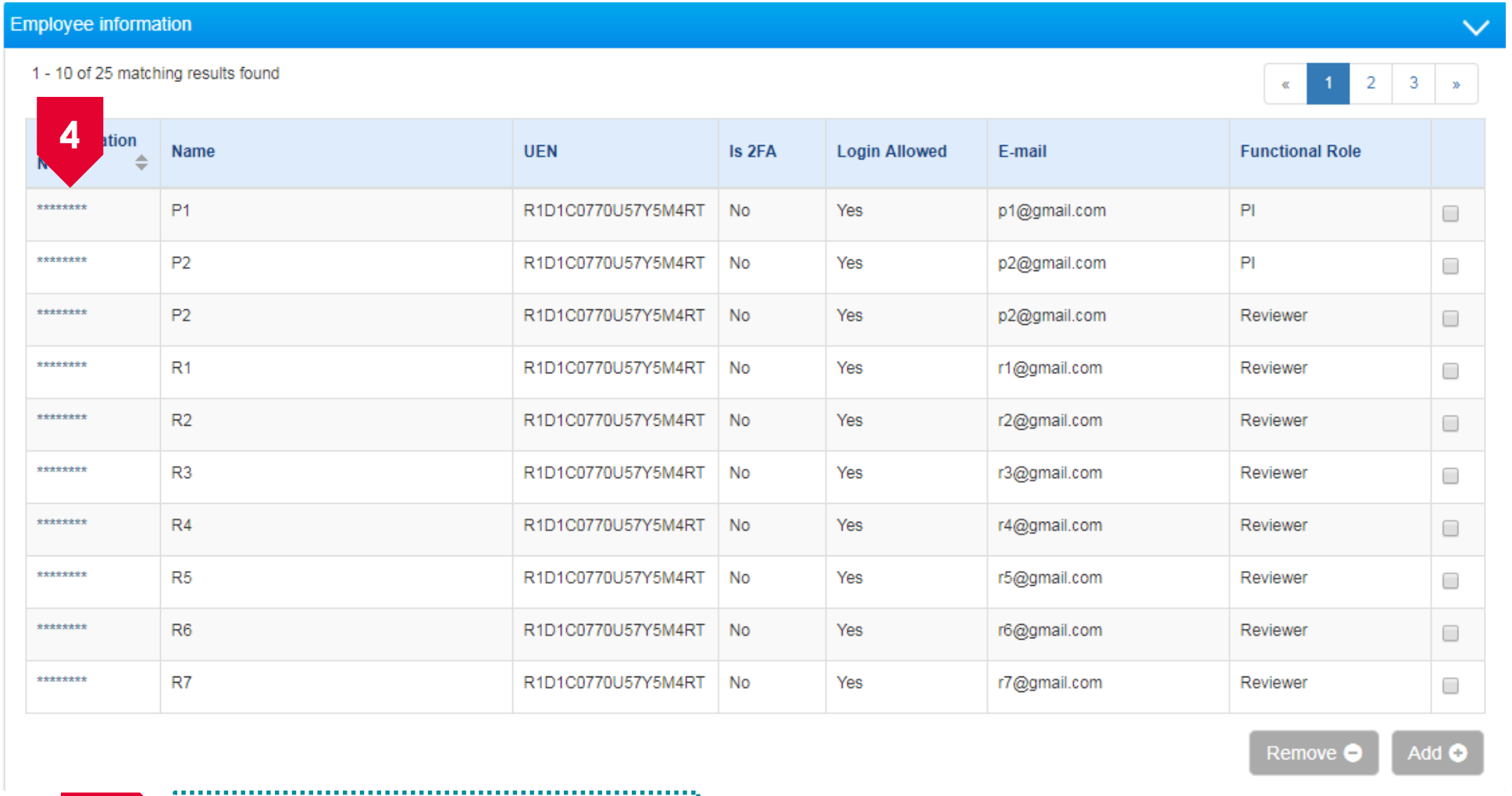
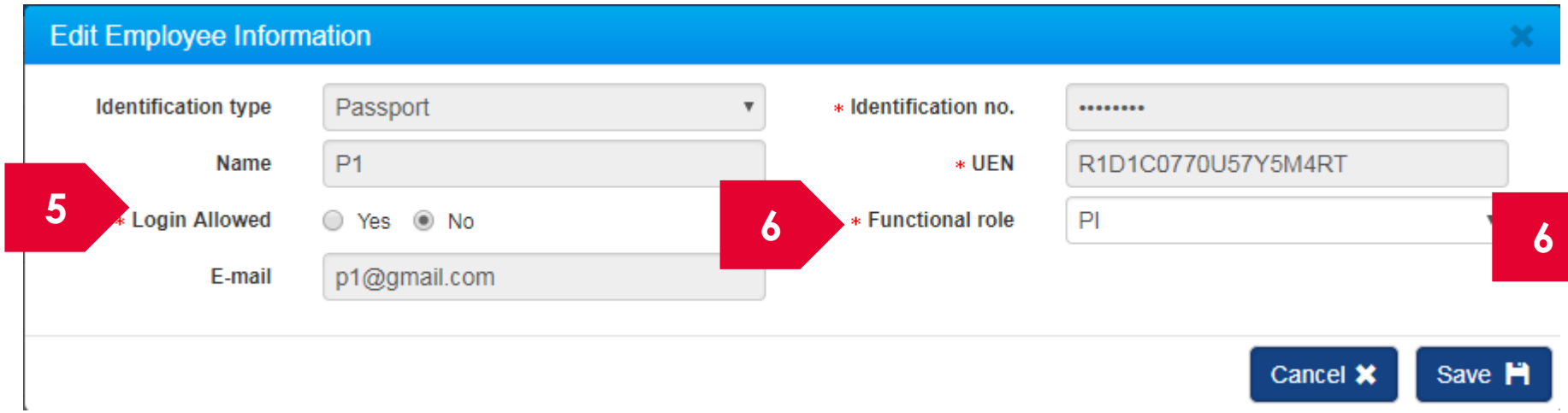
Approve user in IGMS – 4



4 Click on the hyperlink

Approve user in IGMS – 5

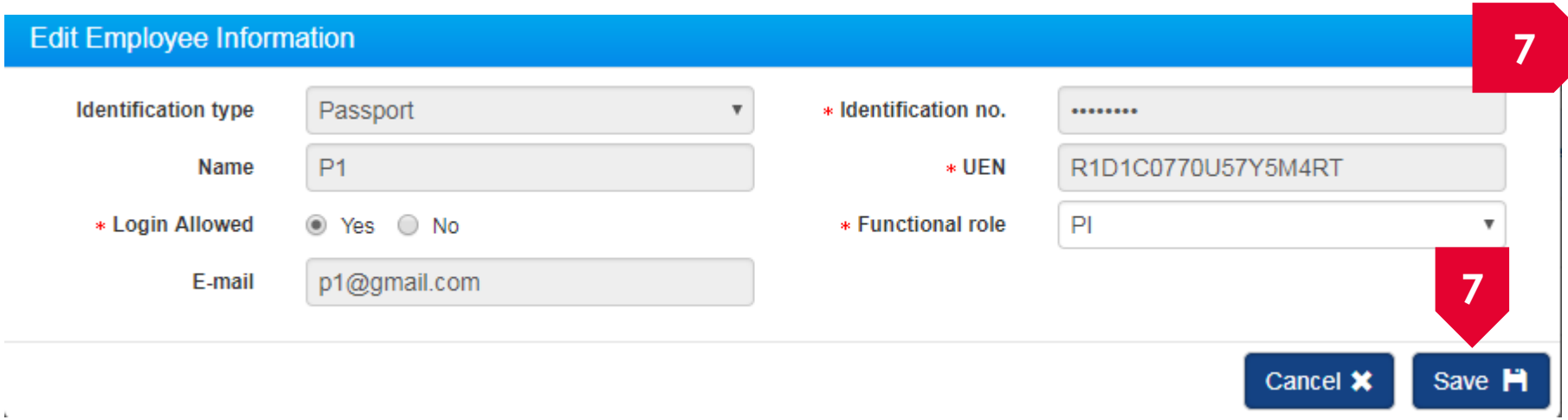


5

Set the Login allowed field as **Yes**

6

Select the Functional Role



7

Click on **Save**

Some questions you may have

Some questions you may have – 1

1

Q: How many users can have HI Admin role in a Host Institution?

A: There is no limit to the number of people who are assigned HI Admin role in a Host Institution.

2

Q: Is there a limit to the number of people who are assigned HI ORE, HI DOR, AI ORE & AI Dean roles in a Host Institution?

A: There is no limit to the number of people who are assigned HI ORE, HI DOR, AI ORE & AI Dean roles in a Host Institution.

3

Q: An IGMS user has resigned from the Host Institution. How will I ensure the person does not login to IGMS?

A: As a HI Admin you are required to login to IGMS and remove the user access for IGMS system. HI Admin is responsible for managing users under the Host Institution.

Some questions you may have – 2

4

Q: Can I assign multiple roles for the same person?

A: Yes. You can assign multiple roles for the same person. Use the add button on the associate member page to assign multiple roles to the same person.

5

Q: Is there a need to approve all PIs registration before PIs is allowed to IGMS?

A: HI Admin has to approve registration of PIs only when the UEN is shared by multiple Institutions.

6

Q: Will the system automatically assign ORE, DOR, AI ORE, AI Dean and HI Admin roles?

A: No. HI Admin has to assign ORE, DOR, AI ORE, AI Dean and HI Admin roles. System will assign PI role by default to all users who are registering in the system.

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