Users guide

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This following guide is a set of instructions for the different kind of the system's users.

Before starting the guide, we will mention the purposes of DSRC web application for the different kinds of users – submitters, admin(s), reviewers, and team members.

Note: each user can be more than one kind of user.

purposes

submitters

- Submit proposals and products of proposals (include blogs and figures/ videos).
- Watch proposals and products of proposals (include blogs and figures/ videos) that already were submitted by logged user.
- Download proposals / products files of logged user for watching them.
- Search and filter proposal / product by criteria.
- Sort proposals / products ascending / descending.

Note: every user that is registered to the system is also a submitter (even if it did not submit any proposal).

Team members

- Watch proposals that the logged user is a team member at.
- Download proposals files, that the logged user is a team member at, for watching them.
- Search and filter proposal by criteria.
- Sort proposals ascending / descending.

Reviewers

- Watch proposals that they were chosen to review.
- Add review(s) to proposal that they were chosen to review.

- Download proposals files, that they were chosen to review, for watching them.
- Search and filter proposal by criteria.
- Sort proposals ascending / descending.

Admin(s)

- Watch the whole proposals.
- Watch the whole products and blogs.
- Download proposal / product files for watching.
- Approved / not Approve proposal.
- Change status of products' blog (Sent reminders, did not submit, sent a draft…).
- Add custom fields for proposal / product (for example: "methodology").
- Search and filter proposal / product by criteria.
- Sort proposals / products ascending / descending.
- Watch the whole submitted products of specific proposal.
- Export products / proposals tables to csv file (excel file).

Guide

Note: The tables of the web application are: My proposals, my products, proposals I'm a team member, manage proposals, manage products, proposals to review. For these tables, there will be one place that explains how to use the filters, sorting, searches and making reports (at the end of the guide).

Let's start with use cases that are relevant for all the users:

Register

- At the home page, at the top menu, press on "Sign in" or click on the "Register" button at the bottom of the page.
- Please fill in the whole details of the registration form and then press "submit".

Notes: 1. if at least one field has invalid value, the "submit" button will be disabled for clicking.
2. for each field, you will get a comment that mentions the reason the field is invalid (in case it invalid).
3. At the password field, you will have a toggle by the name "show password details". By triggering the toggle, you will see the criteria for a strong password.

A criterion would get a V sign, if the condition mentioned at the criteria is true at the filled password. There is also a progress bar that indicates the password's strength.
4. the whole emails from the system are sent from dsrcdsrcdsrc@gmail.com.

- After submitting, you will get an email to the email you filled in on the form. **Pay attention:** the email includes a link that is valid ONLY for 5 minutes from the sending time. If you will not click on the link, or click after the validation time, you will NOT be registered DSRC system. To register to the system, you must click on the link at the validation time.

Login

- At home page, click on "Login" button at the bottom of the page, or click on "sign in" option at the top menu that is shown.
- Insert your credentials at the login page and then click on "Login" (this button will be enabled for clicking only after the whole fields of the log in page will be valid).
  Note: you can also click on "remember me", so the system will save you logged in for 14 days.
  if you will not click on "remember me" button, the system will remember you logged in for only one hour.

Forget password.

- On the login page, press on "forgot password?" button.
- At the forget password page, insert the email you registered with.
- You will get an email with a link to a renew password page.
  Pay attention: the email includes a link that valid ONLY for 5 minutes from the sending time. If you will not click on the link, or click after the validation time, you will NOT be able to renew your password, and you will need to make the whole process all over again. To get to renew password page, you must click on the link at the validation time.
- At the renew password page, insert your new password, and click on "renew password".

  Note: next use cases can be done at the system only if you are logged in. some of the use cases can be done only if you are logged as an administrator (At this specific use cases an admin's requirement phase will be mentioned).

Log out

- At the top menu, click on the "Log out" button.

Submitters

Submit proposal:

- At the top menu, click on "submit proposal" option. From the 4 options, please choose the type of proposal you would like to submit.

Notes: 1. At all the proposals' forms, the whole fields are required (besides "Add team member", which is required only at seed research and dataset research "), which means that the submit button will be enabled for clicking only when the whole fields are filled with valid values. The system will alert you about a field's invalid value or will not let you write it at the field's input.
2. At all the upload fields, only one file can be uploaded. In addition, after choosing the file you would like to upload, you must click on upload so the file will be uploaded to the system's server. If you will not click on the upload button, the field will not be considered as valid field and the submit button will be disabled for clicking. After you click on the upload button, you will get an alert that the file was uploaded successfully.
3. multi fields = fields at the form that can have unlimited number of values, because they can be different between different submissions. Multi fields at proposals: "Add team Member" and at some of them "Budget part". How to fill a field which is multi field? We will explain with using of an example of using the "add team member" multi field.
Click on "add team member" -> fill the created fields and you have added team member.
to add one additional team member, press on the "add team member button" again and so on...

To remove team members, please click on the trash tin icon, next to the team member you would like to remove.

Submit product:

- At top menu, click on "submit product" option. From the 4 options, please choose the type of proposal you would like to submit.
- At Products form, the required fields are only the field that an asterisk (*) is next to them.

Notes: 1. All the notes that were written at the submit proposal's part about the upload fields are valid also for submit product's upload fields.
2. All the notes that were written in the submit proposal's part about the multi fields are valid also for submit product's multi fields. The multi fields at products form are: "Add research team member", "Add publication resulting from the funding" and "Add research grant that submitted to external granting agencies".

My submissions:

My proposals:

- At the top menu, click on the "My submissions " option, then choose "My proposals".
- At my submitted proposals, you will see the whole proposals you have submitted.

My products:

- At the top menu, click on the "My submissions" option, then choose "My products".
- At my submitted products, you will see the whole products you have submitted.

Team member

Proposals I'm a team member:

- At the top menu, click on the "My submissions " option, then choose "proposals I'm a team member".
- On the team members' proposals page, you will see the whole proposals you are a team member.

Reviewers

Proposals to review:

- At the top menu, click on the "My submissions " option, then choose "proposals to review".
- At Reviewer page, you will see the whole proposals you are a reviewer.
- To send a review on a proposal, get to the rightmost column of the proposal you would like to review and click on send review.
  At the dialog, you will see last review you wrote, you can edit your review by editing the text of the review at the dialog. After clicking "send review", your new review will be saved to the system and will be shown the next time you will review the chosen proposal.
- The reviews and the reviews will be seen at the expanded mode of the desired proposal row.

Admins – the following use cases only admin users can do.

Management:

- Manage proposals:

- At the top menu, click on "management" option.
- Click on the "Manage proposals" option.
- You will see the whole proposals of the whole users.

  Custom fields:

  - In case you would like to add more fields with values to these fields to a proposal, you should get to the rightmost column of the table ("Actions" column) at the row of the proposal you would like to add custom fields and click on "manage custom fields".
  - At the opening dialog, you will see the whole custom fields you have already added to this proposal, so you will have the option to **add** new custom fields (by clicking "Add field" -> fill the field's name and value), or **edit** existing fields by just change the name / value / both of the desired fields. for saving the custom fields for the desired proposal at the system , click "update custom fields" .
  - For removing a custom field, you should click on the trash tin icon next to the custom field you would like to remove.
  - The custom fields of proposal / products row will be seen at the expanded mode of the desired proposal / product.

  Update status of proposal (Approved, not Approved, approved partially, pending)

  - In case you would like to set the status of a proposal, you should get to the rightmost column of the table ("Actions" column) at the row of the proposal you would like to set its status and click on "update status".
  - At the opening dialog, you should pick the desired status you would like to change to and click "Update proposal status" to save the update at the system.

Note: If you pick the "Partially Approved" option, you will see a field that you must fill. At that field, fill the amount of budget approved for the proposal.

Watch proposal's products

- In case you would like to watch the whole products that are related to the desired proposal, you should get to the rightmost column of the table ("Actions" column) at the row of the proposal you would like to see its products and click on "watch proposal products".
- You will get to the products table page that contains only the products that are related to that proposal.

Manage products.

- At the top menu, click on "management" option.
- Click on the "Manage products" option.
- You will see the whole products of the whole users.

Note: each table row represents one submission of products forms, which means that each row contains one blog and one figure / video and other products that are related to that blog.

Custom fields:

- In case you would like to add more fields with values to these fields to a row of products, you should get to the rightmost column of the table ("Actions" column) at the row of the proposal you would like to add custom fields and click on "manage custom fields".
- Then the way of adding / editing / saving of custom fields is identical to the one mentioned at the manage proposals -> custom fields use case.

Update blog status (Appeared in research blog, to appear in blog, sent a draft, did not submit, sent reminders)

- In case you would like to set the status of a products row, you should get to the rightmost column of the table ("Actions" column) at the row of the proposal you would like to set its status and click on "update blog status".
- At the opening dialog, you should pick the desired status you would like to change to and click "Update proposal status" to save the update at the system.

Filters, sorting, searches and making reports at the table.

Filters

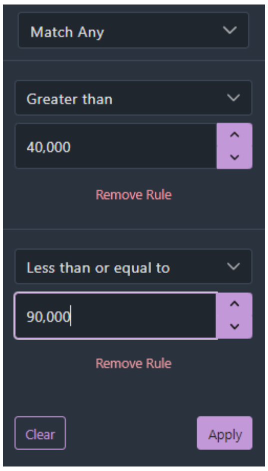
Grant type column

- At grant type column, at the pick list, pick the type of proposals/ products you would like to filter by.
- Then automatically, you will get the filtered proposals / products.

Amount requested column:

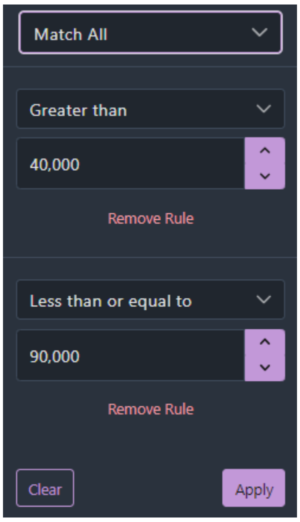
- Click on the amount requested column's header.
- At the dialog open, at the first pick list, pick "Match all" if you would like to make an "and" condition the different rules you made the filter.
  pick "Match any" if you would like to make an "or" condition the different rules you made the filter.
- At the next 2 fields to fill, you need to fill the amount requested you would like to filter by and the relation to (equals, greater than, less than or equal to…).
- Click on "Add rule" if you would like to add a rule.
- Click on remove rule if you would like to remove the desired rule.
- Click "apply" to make the filter be triggered on the table (will make the icon next to the column header be painted).
- Click "clear" to cancel the filter on the table (will make the icon next to the column header to not be painted).

  Examples: 1.



Return only the proposals that their amount requested value is greater than 40000 **or** less than or equal to 90000.

2.



Return only the proposals that their amount requested value is greater than 40000 **and** less than or equal to 90000.

<u>Amount given column</u>:

- Works at the same way as the filter of "Amount requested" column.

<u>Department column</u>

- At department column, at the pick list, pick the department you would like to filter by (At the pick list you can also search for the desired department).
- Then automatically, you will get the filtered proposals.

<u>Status / blog status column</u>

- At status/blog status column, at the pick list, pick the status you would like to filter by.
- Then automatically, you will get the filtered proposals / products.

Sorting

Sorting icons explanation:

If the icon next to the desired column to sort by has two arrows, one up and one down, it means that the proposals are **not** sorted by this column.

If the icon next to the desired column to sort by has one arrow **up**, it means that the proposals are sorted by this column at ascending order.

If the icon next to the desired column to sort by has one arrow **down**, it means that the proposals are sorted by this column at descending order.

First name column

- Click on the first name column to make the sorting by first name be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

Last name column

- Click on the last name column to make the sorting by last name be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

email column

- Click on the email column to make the sorting by email be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

Study title column

- Click on the study title column to make the sorting by study title be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

Application date column

- Click on the application date column to make the sorting by application date be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

Catchy title column

- Click on the catchy title column to make the sorting by catchy title be triggered at ascending/ descending order corresponding to the sorting icons explanation mentioned above.

Searching

- Above the table you will see a search bar ("search keyword" is mentioned inside).
- After typing the search keyword, the table will be automatically filtered by that keyword, which means that the results will be the whole rows, so each row has at least one column that its value has the sub-string of the keyword searched.

Clearing all filters, searching filters and sorting

- Next to the search bar, click on the "clear" button.

Making reports – valid only at admin tables

- Next to the search bar and the "clear button", there is a green button with an icon inside it. If you hover on this button, you will get "export csv".
- Click on the button mentioned before to make the rows displayed to be exported to .csv file (excel file).
  Note: if you use any kind of filter or sorting and then export to csv file, the csv file will be of the displayed rows (aka: the filtered / sorted rows).

Expand row – make you see the rest of the fields of the proposal / products row.

- At the leftmost of the desired proposal / products row, click on the arrow button to expand or collapse the expand row mode correspondingly.

- At the expanded mode, you can also download file of proposal you would like to download so you can watch it (for example: CV at Data science doctoral proposal).

<u>Paging</u>

- At the bottom of the table, at the middle, in can move forward to see the next rows of the table or move backwards to see the previous rows of the table.