**USER GUIDE FOR AFIT RESEARCH MANAGEMENT SYSTEM**

**TABLE OF CONTENTS**

**ADMIN**

**RESEARCHER**

**ADMIN**

**Category**

Projects and members are assigned a category.

**To create a category;**

- Login as an Admin
- Click on *category* on the side menu, then click the *Add New* button on top the tabular list.
- Enter *code* and *name,* then tick *active* (if you want to it readily active and available on other parts of the application). Click *Save* and the category will be added.
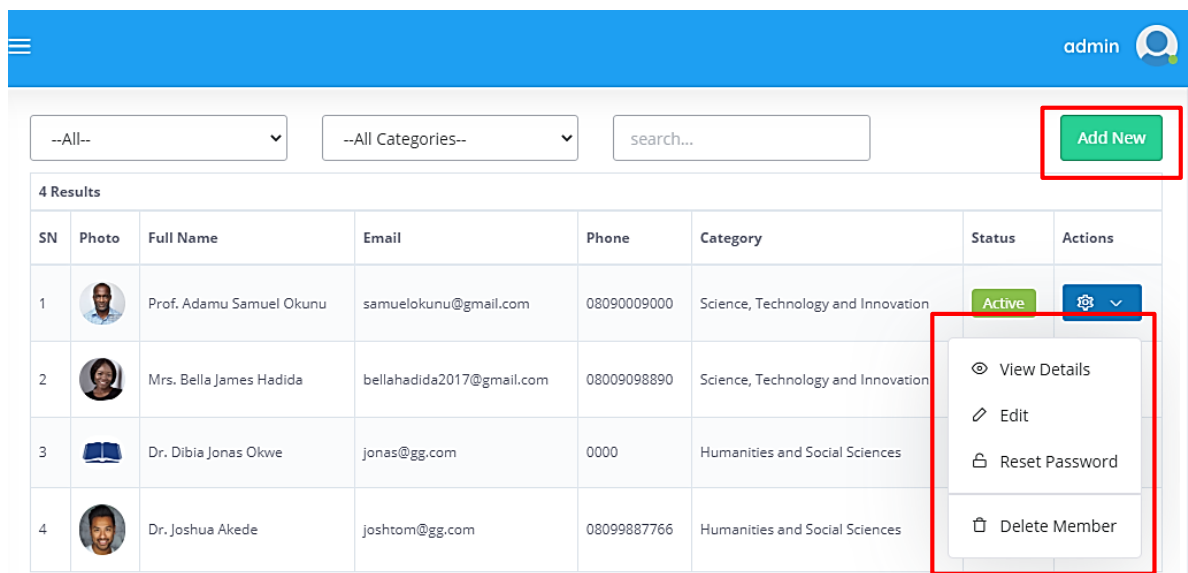
**To edit a category**

- On the tabular list of categories, click on *Edit* on the category you want to edit,
- Update as required, then click *Save.*

**Members**

This part contains details of all researchers who will use the application i.e. who will be assigned projects/task.

**To add a member;**

- Login as an admin
- Click on *members* on the side menu, then click the *Add New* button on top of the tabular list of members.
- Enter the members details correctly in the form provided and click *save.*



**To edit member details:**

- Click on the options button on the member you want to edit
- Click *Edit* on the drop down menu
- Update details and click *save.*

You can also delete a member, view member details or reset password of a members. All these are found on the options drop down as shown above.

**Projects**

**To create a new project;**

- Login as an admin
- Click on *project* on the side menu
- Click *add new* on top of the tabular project list
- Fill the project setup form correctly and click *Save*

**Note*:** Selecting category loads members for the principal investigator and co-principal investigator that belong to the category selected.

**To Edit a Project;**

- Click on the options button on the project you want to edit, Click *Edit* on the drop down
- Update details in the project setup

**To View Project Milestones**

- Just beneath the project row, Click on the Milestones tab.





**Note*: The milestones tab only shows if at least one milestone has been added.**

**To View Project Summary**

- Click on the options button on the project you want to view
- Click *Project Summary* on the drop down



**Adding Attention to Project**

You can add any concerns or issues about a project using the *attention required*. In the project summary page (as seen above),

- Click on attention required
- In the pop up that shows, enter the attention note, tick ***Show to Team Members,*** if you want the attention to be shown to team members as well, leave unticked if you want only PI to view attention.
- Click **Send**

**To Confirm Project as Completed**

When a PI changes the status of his project to ***completed***, the admin has to confirm that it there are no issues and ***confirm/approve*** the project as completed.

To do this;

- On the completed project summary page, click ***Confirm Completion.***
- Click ***Ok*** the confirmation alert that shows and project is marked as completed.

**Security**

**Setting up Roles**

You can create roles, add functions to roles and then assign roles to admin users.

**To create a role;**

- Under *security* on the side menu, click on *Roles*
- Click on *Add new* button on top the roles list table
- Enter code (any unique short identifier for the role) and name of role, then click *save*

**Adding Permissions to a Role**

Permissions consist of the functions a particular role is authorized to perform.

**To add permissions to a role;**

- Under *security* on the side menu, click on *Roles*
- Click on *Authorize* on the role you want to add permissions



- On the authorize page, tick the functions the role is permitted to perform.

| S/N | Menu Group | Menu Item | View ☐ | Add New ☐ | Delete ☐ | Update ☐ | Authorize ☐ |
|---|---|---|---|---|---|---|---|
| 1 | Category | Category | ☑ | ☑ | ☑ | ☑ | ☑ |
| 2 | Members | Members | ☑ | ☑ | ☑ | ☑ | ☑ |
| 3 | Project Milestones | Project Milestones | ☑ | ☑ | ☑ | ☑ | ☑ |
| 4 | Projects | Projects | ☑ | ☑ | ☑ | ☑ | ☑ |
| 5 | Security | Roles | ☐ | ☐ | ☐ | ☐ | ☐ |
| 6 | Security | Users | ☐ | ☐ | ☐ | ☐ | ☐ |
| 7 | Security | Change Password | ☑ | ☑ | ☑ | ☑ | ☑ |

**Note\*: Authorize is any other function apart from viewing, adding, deleting or updating. For example, to <u>Confirm Completion</u> of a project, or <u>Adding Attention</u> or to <u>Reset Password</u> of a member.**

**Adding Admin Users**

- Under *security* on the side menu, click on ***Users***
- Click the ***Add New*** button on top the users list table
- Select a ***Role*** from the role drop down and fill the other user details
- Click ***Add User***

**RESEARCHER**

**Your Projects**

To view projects assigned to you;

- Login as a researcher
- Click on *Your Projects* on the side menu
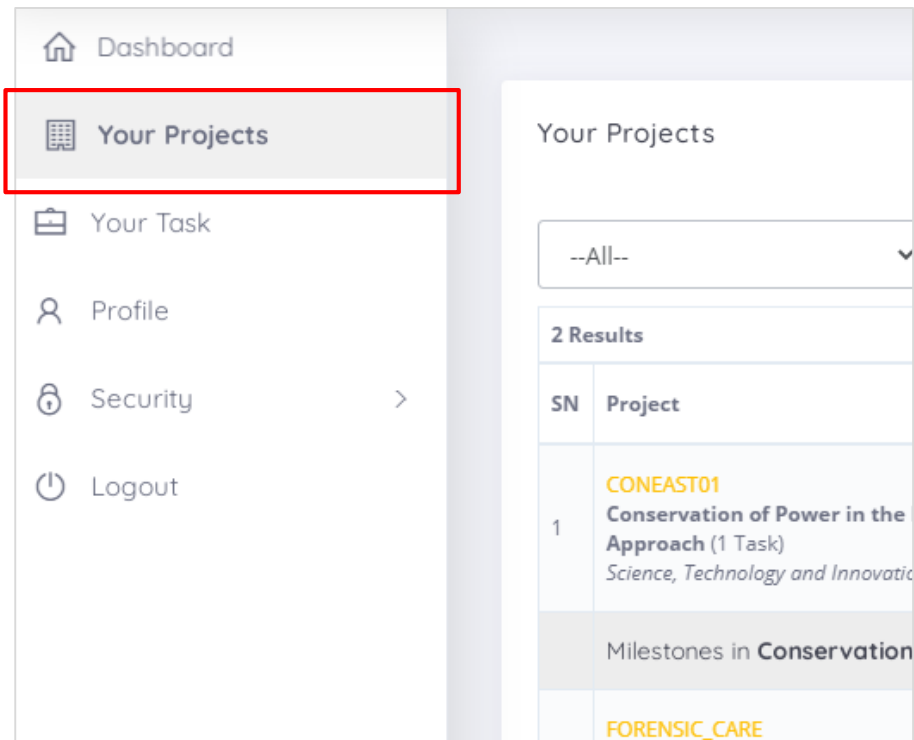


**To Add Task to a Project;**

- Click on *Your Projects* on the side menu
- Click the options button on the project you want to add task, select *View/Add Task*
- Click on the *Add new* button on top of the task list table
- Fill the details in task setup form
- Click *Save*

**Add Milestone to Project**

- Click on *Add Milestones* on the project you want to add a milestone to (as seen above)
- Enter description of the milestone, the current progress percentage the milestone has brought the project, you can add supporting documents and photos
- Click *Save Milestone*

Upload Project Photos

caption

no image

Select image

+ Add Photo

Click to add more photos

**To View Project Milestones**

- Just beneath the project row, Click on the Milestones tab.



| 1 | MACHINE_TECHS<br>**Machine Servicing Techniques** (0 Task)<br>*Humanities and Social Sciences* | 29-06-2020 23:01 PM | 24-06-2020 - 30-06-2020 | |
| | Milestones in **Machine Servicing Techniques** | | | |
| ⊘ | Formula 1 Description technique | | 02-07-2020 09:56 AM | ↑ |

**Change Project Status**

- Click on the *status* button on the project you wish to change its status
- Select the new status from the drop down on the pop up that shows, click *Change Status*



| SN | Project | Date Created | Duration | Priority | Status | Progress | Actions |
|----|---------|--------------|----------|----------|--------|----------|---------|
| 1 | MACHINE_TECHS<br>**Machine Servicing Techniques** (0 Task)<br>*Humanities and Social Sciences* | 29-06-2020 23:01 PM | 24-06-2020 - 30-06-2020 | High | Ongoing | | ⚙ ⌄ |
| | Milestones in **Machine Servicing Techniques** | | | | | | ⌄ |
| ⊘ | Formula 1 Description technique | | 02-07-2020 09:56 AM | | ↑ 2% | 🔵 | 🟧 🟥 |

**Add Publications to Project**

- Click on *view/add publications* on the project you wish to add publications
- Click *Add new* button on top of the publications list table
- Select *type* and fill the other publication details.
- Click *Save*

**YOUR TASK**

To view task assigned to you;

- Login as a researcher
- Click on *Your Task* on the side menu

**Add Milestone to Task**

- Click on *Add Milestones* on the task you want to add a milestone to (as seen above)
- Enter description of the milestone, the current progress percentage the milestone has brought the task, you can add supporting documents and photos
- Click *Save Milestone*

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| | MACHINE_TECHS | | | |
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**Change Task Status**

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| SN | Task | Team Members | Duration | Priority | Status | Pro |
|---|---|---|---|---|---|---|
| 1 | **SITE** **Site Visitation** **Project Title:** variations of passages of Lorem Ipsum | | 11-05-2020 - 29-05-2020 | High | Ongoing | |
| | Milestones in **Site Visitation** | | | | | |