

## **Pre-Award – Grant Announcement**

This guide shows Pre-Award Services Team (Research Operations and Support) how to update the Project within Research Master when the outcome of an application is received.

### **Guidelines and rules**

- A Research Master login and access to the networked shared drive are required to complete this task.
- The following actions are required when the Pre-Award Services Team at Research and Innovation has submitted the application for a Competitive Research project to the funding body.
- All documents are linked via the RMIT network path (soft copies are not permitted to be attached)
- All file paths must have the full network path, not a mapped drive. For example, '//rmit.internal/University/' not 'K:/'

### Who is involved in this process?

- **Grants Officers:** Responsible for performing the tasks set out in the instruction steps and actions.
- **Grants Coordinator:** Responsible for performing and assisting with the tasks set out in the instruction steps and actions.
- Senior Grants Coordinator: Responsible for performing and assisting with the tasks set out in the instruction steps and actions.
- Senior Manager, Grants Development: Responsible for overviewing and assisting with this procedure when required.



# **Unsuccessful Application**

1.	From the home screen, mouse over <b>Projects</b> from the top menu and then select <b>Projects</b> again from the drop down menu	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System Help Logout Projects Research Management System Online Forms
2.	Search for the project record you would like to update	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System 2a Logout
	<ul> <li>a. Use the <b>Basic</b> search field by entering the <b>Project Code</b> and click Search</li> <li>b. Use the <b>Advanced</b> search fields to</li> </ul>	Area Table Field Not Operator Value 20 Core V Projects V Project Code V Includes V Retrieve search Save Search Clear
	extend your search criteria	Projects (2032) Add Delete Export Project Code Project Title Primary Contact Start Date End Date Project Type Curry
3.	Select the project you want to update, by clicking on the row	Project code     Project rule     Project rule     Project rule     Project rule     Project rule     Project rule     Competitive Research     Image: Code Code Code Code Code Code Code Code



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4.	Select 'Unsuccessful' from the Project status	New Projects			Save Back
	dropdown list	Project Code		Version	Current? 🗹 5
			🔏 🗇 🛅 🖏 X² X,	B I <u>U</u> Ω -	
F	Un tick the <b>Current</b> checkboy	-			
5.		Project Title			
			Design HTML Pre	eview	
		Primary Contact			
		Primary Org. Unit			
		Tot. Applied Amt		Tot. Approved Amt	Tot. Received Amt
		Project Type	Commercial Research 🔻	Government Category Not Specified	Funded?
		Start Date		End Date	Confidential?
		4 Project Status	Data Entry 🔻	Progress Status Not Specified	Project Entry Status Data Entry
6.	Click on the 'Project Dates' to open the <b>Project</b>	Project Dates	6		
	Dates subsection	Date Applied	d	Date Approved	
	Dutes subsection	Date Withdraw	n	Date Combined	
-		Date Rejected	d	Date Closed Off	Closed?
7.	Enter the Date Closed Off by clicking in the field				
	and selecting the date using the date picker. This is				
	the date displayed on the Unsuccessful letter				
8	Tick the <b>Closed</b> checkbox to close off the record				
0.	The the closed checkbox to close of the record				
9.	Click on the <b>Save</b> link to save the core Details	New Projects			Save 9 k
		Project C	ode	Version	Current? 🗹



### **Enter Project Details – Subsection - Documents**





4.	Select 'Path' from the Document Type	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System Help Logout
	dropdown list.	New Documents Save Back
5.	Paste the Windows Explorer path into the <b>Document</b> field	4       Document type Path       Doc. Category Not Specified       Restricted Access?         1       Document K:R and IResearch Office         5       ument Path         Name Research Office
6.	If the path contains a mapped drive, then edit	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System Help Logout
	the drive reference in <b>Document</b> field to the	Documents (1/2) Save Back
	server path.	Document type Path V Doc. Category Not Specified V Restricted Access?
7.	The <b>Name</b> will be populated, but you can	6 Document ///mit.internalUniversity/R and I/Research Office/testdoc.xlsx
	change it if need be	Document Path //rmit.internalUniversity/R and I/Research Office/testdoc.xlsx
8.	Enter a Short Description if required	Name testdoc.xisx 7
		8 Short Description Comments Document Full Path
9.	Click <b>Save</b> to save the changes. Otherwise	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System Help Logout
	citic back to return to the previous page	Save Back
10.	<ul> <li>To add more documents:</li> <li>a. Mouse-over the Cog icon</li> <li>b. Click on the Copy icon and</li> <li>c. Repeat steps 2 to 9</li> </ul>	10a     Copy     Doc. Category     Not Specified     Restricted Access?     9       Save Layout     Browse       Document Path       Name



### Successful Application

1.	From the home screen, mouse over <b>Projects</b> from the top menu and then select <b>Projects</b> again from the drop down menu	Home       Projects       Ethics       Research Outputs       Contracts       Applications       HDR       Scholarships       Personnel       System       Help       Logout         Projects       1       Research Management System       Online Forms       Online Forms       Online Forms
2.	<ul> <li>Search for the project record you would like to update</li> <li>a. Use the Basic search field by entering the Project Code and click Search</li> <li>b. Use the Advanced search fields to</li> </ul>	Home       Projects       Ethics       Research Outputs       Contracts       Applications       HDR       Scholarships       Personnel       Svstem       2a       Logout         Area       Table       Field       Not       Operator       Value       Value       2b         Image: Core       V Projects       V Project Code       Includes       Includes       2b         Retrieve search       Save       Search       Clear
3.	extend your search criteria. Select the project you want to update, by clicking on the row	Projects (2032)       Add       Delete       Export         Project Code       Project Title       Primary Contact       Start Date       End Date       Project Type       Curre         00003       Testing PA       07/09/2017       21/09/2017       Competitive Research       Image: Commercial Research       Image:



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4. Select 'Pending Agreement Negotiation' from the	🔅 New Projects	Save Back
Project status dropdown list	Project Code Version	Current? 🗹
	μα Ω το το ματικό μα Σα ματικό ματικ	
	Project Title	
	Design HTML Preview	
	Primary Contact	
	Primary Org. Unit	
	Tot. Applied Amt Tot. Approved Amt	Tot. Received Amt
	Project Type Commercial Research V Government Category Not Spec	ified   Funded?
	Start Date End Date	Confidential?
	Project Status Data Entry     Progress Status Not Spece	ified    Project Entry Status Data Entry
5. Click on the 'Project Dates' to open the <b>Project</b>	Project Dates 5	
Dates subsection	Date Applied Date Approved	
Dales subsection.	Date Withdrawn Date Combined	
	Date Received Date Closed Off	Closed?
6. Click on the <b>Save</b> link to save the details	New Projects	Save
	Project Code Version	Current?



#### **Enter Project Details – Subsection - Documents**





4.	Select 'Path' from the <b>Document Type</b> dropdown list.	Home         Projects         Ethics         Research Outputs         Contracts         Applications         HDR         Scholarships         Personnel         System         Help         Logo           Image: New Documents         Save         Back         Save         Back         Save         Save <td>ut</td>	ut
5.	Paste the Windows Explorer path into the <b>Document</b> field	4       Document type       Path       Doc. Category       Not Specified       Restricted Access?         5       Unent Path         Name       Research Office	~
6.	If the path contains a mapped drive, then edit	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel System Help Logo	ut
	the drive reference in <b>Document</b> field to the server path.	Documents (1/2)     Save     Back       Document type     Path     Doc. Category     Not Specified     Restricted Access?	
7.	The <b>Name</b> will be populated, but you can change it if need be	Document ///mit.internalUniversity/R and I/Research Office/testdoc.xlsx     Document Path //rmit.internalUniversity/R and I/Research Office/testdoc.xlsx	
8.	Enter a <b>Short Description</b> if required	Name     testdoc.xisx     7       8     Short Description       Comments       Document Full Path	
9.	Click <b>Save</b> to save the changes. Otherwise click <b>Back</b> to return to the previous page	Home       Projects       Ethics       Research Outputs       Contracts       Applications       HDR       Scholarships       Personnel       System       Help       Logout         Image: Strate in the strate i	
10	. To add more documents:	Save Layout Browse	
	a. Mouse-over the <b>Cog</b> icon	Document Path Name	
	c. Repeat steps 2 to 9		