

# **Pre-Award – Create New Project**

This guide shows Pre-Award Services Team (Research Operations and Support) how to create a new project within ResearchMaster.

#### **Guidelines and rules**

- When adding a new funding application to the ResearchMaster (RM) database, Pre-Award Services follow these instructions to create a new record.
- A ResearchMaster login and access to the networked shared drive are required to complete this task.
- When the outcome of the grant is announced, the status can be changed.
- 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 to the 'Documentation' folder, not a mapped drive. For example, '//rmit.internal/University/' not 'K:/'

#### Exclusion

These instructions do not include how to update and make variations to the RM record after the application has been submitted, e.g. adding details and files once an outcome has been announced, or adding agreements or contracts.

### 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.



#### Add New Project

1.	From the home screen, mouse over Projects	Home Projects	Ethics Research Outputs	Contracts Ap	pplications HDf	R Scholarship	s Personr	nel	Syste	m Help	Logout
	from the top menu and then select <b>Projects</b> again from the drop down menu	Projects	1 Research	n Management	t System			Onl	ine Forms		
2.	Click on the <b>Add</b> link	Home Projects	Ethics Research Outputs	Contracts A	Applications HDF	Scholarships	Personnel		System	Help Lo	gout
							Project Code		2	Advanced	
	A new 'Projects' form will be displayed. Enter	Projects (2032)					2	Add	Delete	Expo	<u>art</u>
	the following details from either the Research	Project Code	Project Title		Primary	Contact	Start Date	End Date	Projec	t Type	Curre
	Funding coversheet or Application.	0003	Testing PA				07/09/2017	21/09/2017	Competitive	Research	¥
		0005	Project Title Example						Commercia	I Research	$\checkmark$

#### **Enter Project Details**

1. Enter the **Project Title** as per the grant application.

If the application is led by a university other than RMIT, add "(Administered by ....)" after the title. If the project is an Expression of Interest rather than a full application, add "(EOI)" after the title.

- 2. The **Current** checkbox to set ticked by default. If not, tick it
- 3. The **Project type** will automatically default to 'Competitive Research' from the dropdown list
- 4. Enter a **Government Category**, either; CAT1, CAT2, CAT3, or CAT4. If you don't know which category the grant is in, look up the category in

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Project Code		Version		2 Durrent?	1		
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1							
Project Title							
	Design HTML Pre	view					
Primary Contact							
Primary Org. Unit							
Tot. Applied Amt		Tot. Approved Amt		4 Tot. Received Amt			
3 Project Type	Commercial Research 🔻	Government Category	Not Specified	▼ Funded?	]		
Start Date		5 End Date		6 Confidential?	]		
Project Status		Progress Status	Not Specified	▼ Project Entry Status	Data Entry	<b>•</b> 9	
7		8					



the Funding Module (System -> General -> Fund Scheme)	
<ol> <li>Enter the Start date by clicking in the field and selecting the date using the calendar that pops up. This field refers to the proposed start date of the project</li> </ol>	
6. Enter the <b>End date</b> by clicking in the field and selecting the date using the calendar. This field refers to the expected end date of the project	
<ol> <li>Enter the Project status by selecting an option within the dropdown list. When an application is submitted select "Application Submitted"</li> </ol>	
8. The <b>Progress status</b> is defaulted to 'Not Specified'. Leave as is	
9. The <b>Project Entry status</b> is defaulted to 'Not Specified'. Leave as is	
10. Enter the <b>Date applied</b> by clicking in the field and selecting the date using the calendar. This is the date the application was submitted to the Funding Body	Project Dates         10       Date Applied         Date Withdrawn       Date Combined         11       Date Received         Date Closed Off       Closed?
11. Enter the <b>Date received</b> by clicking in the field and selecting the date using the calendar. This is the date the application and coversheet was received by the Research Office.	



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	Project Details		
<ol> <li>Enter the File field only if the application has a unique ID, e.g. APP1234567 (usually this field only needs to be completed for ARC and NHMRC schemes)</li> </ol>	Funding Type     Not Specified       13     Folio       14     Project Description	Account Code	12 File TRIM Number
13. Leave the <b>Folio</b> field blank	Keywords		
14. Enter a short project summary in the <b>Project</b> <b>Description</b> field. Add a short summary of the application. Lay/media summaries or Abstracts are often found at the start of an application.	Primary Function Weighted Score Strategic Basic% Experimental Dev% 0	Weighting Pure Basic% 0 Applied% 0	Z Total %
<ol> <li>Click on the Save link to save the details. This will show other Related Items. This will also generate a Project Code</li> </ol>	New Projects Project Code	Version	15 Save Back Current?



### Enter Project Details – Subsection – Personnel (Add Primary Contact)

1.	Go to the <b>Personnel</b> subsection and click the <b>Add</b>	Linked Schools (0)	Add
	link. This will display the Personnel subsection	Personnel (0)	Add
	form	Significant Dates (0)	Add
2.	Enter the employee number of the lead RMIT	New Investigators	6 Save Back
	investigator into the <b>Person Code</b> , or use the	Person Code 2 Order 2	Current? 🗹
	search facility. Once you have entered a code,	Preferred Title Not Specified    Preferred First Name	3 Primary?
	some sections will auto populate	Preferred Middle Name Preferred Family Name	Primary Contact?
	some sections will dute populate	Preferred Full Name Gender Not Specified	<b>v</b>
2	Click the <b>Drimony</b> checkbox to get the Dersonnel's	Position Chief Investigator   Type Scholarship Recipient	Campus Not Specified
3.	Click the <b>Primary</b> checkbox to set the Personnel's		
	organisation unit as the primary organisation unit	Role	
	for the project. This will automatically populate		
	the 'Primary Org. Unit' in the Core Details section	Workload Details	
	for the project	Involved From Involved To	Internal Weighting
		FTE/EFTS on this Project Days on this Project	
4.	Click the Primary Contact checkbox to set the	FTE/EFTS on other	
	personnel as the primary contact. This will	Project	
	automatically populate the personnel as the	Audit Details	
	'Primary Contact' in the Core Details section for		
	the project.		
5.	Select 'Chief Investigator' from the Position		
0.	dropdown field		
6.	Click Save to save the changes		



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

In order to add the **Documents** in the ResearchMaster Projects Module, you must create an e-file.

#### Create e-file

1. Create the e-file folder in \\rmit.internal\University\R and I\Research Office\Research\_Projects\Files (post 1 July 2012) using the RM reference number as the primary identifier and the primary CI's family name as the secondary identifier. Use naming conventions as shown below:

RM number\_family name E.G. 0200303476\_hawley

The RM number is at the top of the "Project Data Entry" window.

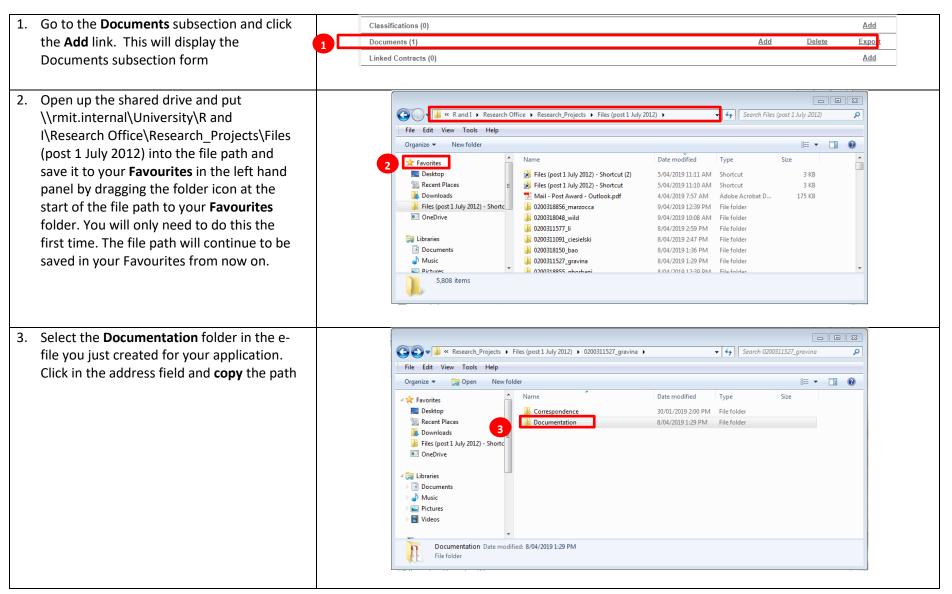
2. Within the e-file folder, create another folder titled **Documentation**. In this folder, save the application and coversheet. These can be found in the Pre-Award Shared Drive: K:\R and I\Research Office\RRD\_SHAR\Res Support\Pre-Award Services\Application Files.

Use the filename conventions:

- RMNumber\_preaward coversheet (eg 0200303476\_preaward coversheet.pdf)
- RMNumber\_application (eg 0200303476\_application.pdf)

NOTE: Ensure the version of the Coversheet you copy into this folder is the version that has both the School and R&I endorsement email trail. Ensure both are saved as PDFs.







4.	Paste the file path into the <b>Document</b> field in RM				Logout
		New Documents	Save		Back
		4 Document type Path 🔽 Doc. Category Not Specified 🔽 Restricted Access?			
		Document K:\R and I\Research Office			
		Document Path			
		Name Research Office			
5.	The Short Description should auto	Home Projects Ethics Research Outputs Contracts Applications HDR Scholarships Personnel	System	Help	Logout
	populate to <b>Documentation</b> as per the	Documents (1/2)	Save		Back
	folder	Document type Path V Doc. Category Not Specified V Restricted Access?			
		5 Document //mit.internalUniversity/R and I/Research Office/testdoc.xlsx			
		Document Path //rmit.internalUniversity/R and I/Research Office/testdoc.xlsx			
		Name testdoc.xlsx			
		Short Description			
		Short Description			
		Comments			
		Commona			
		Document Full Path			
6.	Click Save to save the changes. Otherwise		stem 6		
0.	-				ogout
	click <b>Back</b> to return to the previous page		ave	Ba	:K
		7a 7b off copy Occ. Category Not Specified Restricted Access?			
7.	To add more documents:	Save Layout Browse			
	i. Mouse-over the <b>Cog</b> icon	Document Path			
	ii. Click on the <b>Copy</b> icon and	Name			
	iii. Repeat steps 3 to 9				



## **Enter Project Details – Subsection – Linked Funding**

1. Go to the Linked Funding subsection and click on	Linked Contracts (0)				Add	
it or click the <b>Add</b> link. This will display the Linked	Linked Funding (0)				Add	
Funding subsection form	Linked Projects (1)			Add D	elete <u>Export</u>	
2. Enter the Fund Scheme Code* into the <b>Fund</b>	New Fund Schemes			3	Save Bac	:k
Scheme Code field, or use the search facility.	Fund Scheme code	2		Fund Scheme Type	und Scheme	•
Once you have entered a code, some sections will	Abbreviated Name	Status	Data Entry 🔹	Primary Fund Scheme		
	Organisation	Organisation Name		Current?		
auto populate and the other sections can remain blank	Reference Number	Account Name	Q	Order 1		
	Date Applied	Date Approved		Round		
*If a fund scheme code has not been created for the	Source of funds Not Sp	pecified •				
	Period of Funding					
application you are entering, email Post-Award who	Date Funded From	Date Funded To				
will create the Fund Scheme Code for you, as well as	Extension Required	Extension Approved		Date Extended To		
provide you with the Government Category number						
	Comments					
	<b>Contraction</b>					
3. Click <b>Save</b> to save the changes						
	Funding Application Dates					
	Date Withdrawn	Date Transferred		Date Rejected		
	Date Combined	Date Closed Off				_
	Summary					
	Audit Details					
4. Go to the Linked Funding subsection and click on	Linked Funding (0)				Add	
-	Audit Details					
it or click the <b>Add</b> link. This will display the Linked						
Funding yearly breakdown subsection form						



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<ul> <li>year. It is not necessary to break down these amounts by funding year</li> <li>5. Click Save to save the changes</li> <li>6. Click Back to return to the previous page</li> </ul>	Enter the total funding request in the first budget	New Linked Funding		5 Save Back 6
Delete     2017     ▼     0.00     0.00     0.00       5. Click Save to save the changes		Linked Funding (0)		Delete
5. Click <b>Save</b> to save the changes	by funding year	Year	Applied Amounts Original Award Amounts Aw	varded Amounts
6. Click <b>Back</b> to return to the previous page	5. Click <b>Save</b> to save the changes	-⇔ <u>Add</u>	0.00 0.00	0.00
	6. Click <b>Back</b> to return to the previous page			



## **Enter Project Details – Subsection – Classifications**

1.	Go to the <b>Classifications</b> subsection and click the	Change History (0)	
	Add link. This will display the Classifications	Classifications (0) Add Delete Exp.	
2.	subsection form Enter up to three FOR codes and one SEO code as indicated on the Grant Application Coversheet. The Researcher nominates the most appropriate FORs and SEO. Select a <b>Classification Type</b> from the drop down list Enter the Classification Code into the <b>Classification Code</b> field, or use the search	Documents (1)       Add       Delete       Expr         Add       Delete       Expr         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure         Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second structure       Image: Second s	ck
	facility. Once you have entered a code, some sections will auto populate	Audit Details	
4.	Ensure the total percentage for each Classification type adds up to 100 % in the <b>Percentage</b> fields		
5.	Click the <b>Primary</b> checkbox for the first nominated code		
6.	Click Save to save the changes		
7.	<ul> <li>To add more codes:</li> <li>a. Mouse-over the Cog icon</li> <li>b. Click on the Copy icon and</li> <li>c. Repeat steps 2 to 6</li> </ul>	Tope       Tope       Tope       Save         Save Layout       Tope	Back



Otherwise click <b>Back</b> to return to the	
previous page	

# Enter Project Details – Subsection – Personnel

1.	Go to the <b>Personnel</b> subsection and click the <b>Add</b> link. This will display the Personnel subsection form	Personnel (0)	<u>.dd</u> 1
2.	Enter the employee number of any other RMIT investigators into the <b>Person Code</b> or use the search facility. Once you have entered a code, some sections will auto populate.	New Investigators     Save       Person Code     2     Order     2     Current?     ?       Preferred Title Not Specified     Preferred First Name     Primary?     ?       Preferred Full Name     Preferred Family Name     Primary?     ?       Preferred Full Name     Gender Not Specified     *     ?       Scholarship Recipient     Campus Not Specified     *	Back
3.	Select <b>Position</b> dropdown field 'Chief Investigator'. (Do not tick boxes for 'Primary' or 'Primary Contact')	Role	
4.	Click <b>Save</b> to save the changes.		
5.	Enter the employee number of the grant reviewer into the <b>Person Code</b> or use the search facility. Once you have entered a code some sections will auto populate.	New Personnel       Save         Person Code       Order       Gender       Current?         Preferred Title       Not Specified       Preferred First Name       Primary?         Preferred Middle Name       Preferred Last Name       Primary Contact?         Preferred Full Name       Gender       Not Specified         Position       Primary Grant Officer       6	Back
6.	Select Position dropdown field 'Primary Grant Officer'. (Do not tick boxes for 'Primary' or 'Primary Contact')	Role	<i>I</i>



7. Click <b>Save</b> to save the changes	
To add more personnel repeat steps 1-4.	

# Enter Project Details – Subsection – Linked School

1.	Only follow these next steps if the linked school	Linked Projects (1)	Add	Delete	Export
	does not auto populate after entering the	Linked Schools (0)			Add 1
	Personnel in, and/or for staff outside the	Personnel (0)			Add
	Academic Schools in the HR structure but perform				
	research in Academic Schools (such as ECP				
	Directors and other Academic Executives). Go to				
	the Linked School subsection and click the Add				
	link. This will display the Linked School				
	subsection form				
	Enter the School Code into the Code field an use				Deut
2.	Enter the School Code into the <b>Code</b> field, or use	Code 50043549		Sav	Back
	the search facility. Once you have entered a code,	Percentage 100	_	urrent? 🗹	
	some sections will auto populate	Used To Used To			
2	Future the managements of the Demonstrate field	Org. Units (1)	Add	Dele	te Export
3.	Enter the percentage % in the <b>Percentage</b> field.	Code Name Percentage		urrent?	Primary?
	Percentages should add to 100%	50043549     Media and Communication     100       First     Prev     1     of 1     Next     Last     Records per page: 25     v	<b>V</b>		<b>V</b>
		TIST LIGAT OIL MERT FUELDING HE HAVE. 2.3 4			
4.	Click the <b>Primary</b> checkbox if the organisation				
	unit is the primary organisation unit. If the				
	primary organisation unit was not set when the				
	primary contact (personnel) was linked, then by				
	ticking this checkbox, the organisation unit will be				
	the 'primary organisation unit' and it will display				
	in the core project details section. There should				
	be a least 1 organisation unit listed at 100%				



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	🔅 New Projects	Save Back
5. Click <b>Save</b> to save the changes	Project Code Version	Current? 🗹
· ·	💥 🗇 🖺 🚳 Χ' Χ, Β Ι <u>U</u> Ω -	
	Project Title	
	Design HTML Preview	
	Primary Contact	
	Primary Org. Unit	
	Tot. Applied Amt Tot. Approved Amt	Tot. Received Amt
	Project Type Commercial Research 🔻 Government Category Not Specified 🔻	Funded?