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

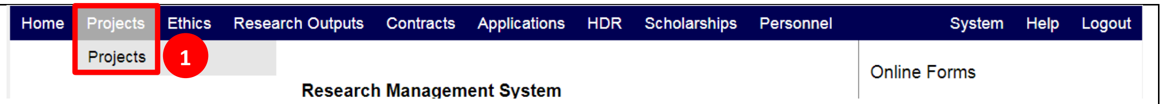
These instructions do not include how to update and make variations to the RM record after the application has been submitted, e.g. adding details and files once an outcome has been announced, or adding agreements or contracts.

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.

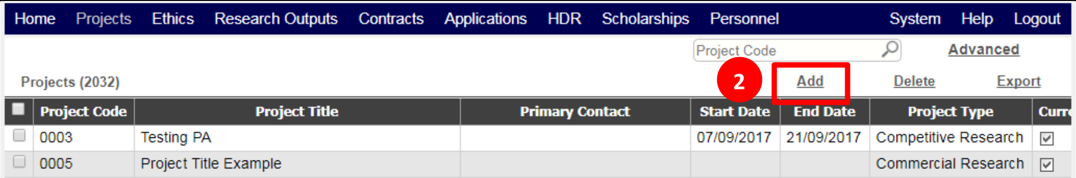
Add New Project

1. From the home screen, mouse over **Projects** from the top menu and then select **Projects** again from the drop down menu



2. Click on the **Add** link

   A new 'Projects' form will be displayed. Enter the following details from either the Research Funding coversheet or Application.



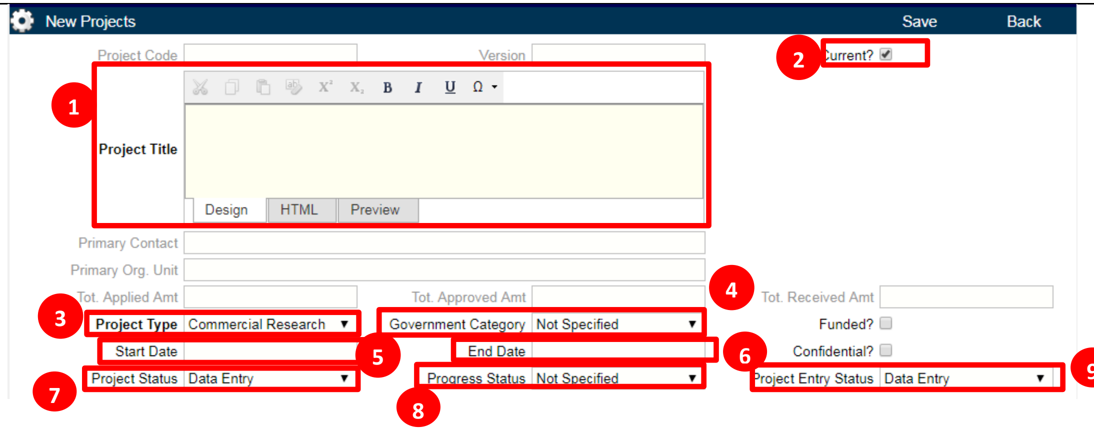
Enter Project Details

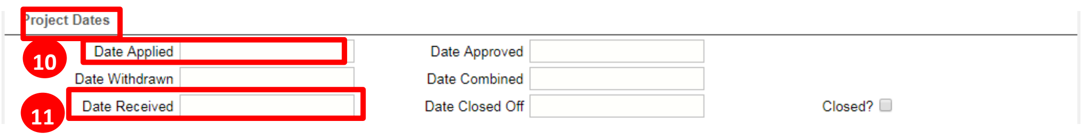
1. Enter the **Project Title** as per the grant application.
   If the application is led by a university other than RMIT, add "(Administered by ….)" after the title.
   If the project is an Expression of Interest rather than a full application, add "(EOI)" after the title.

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

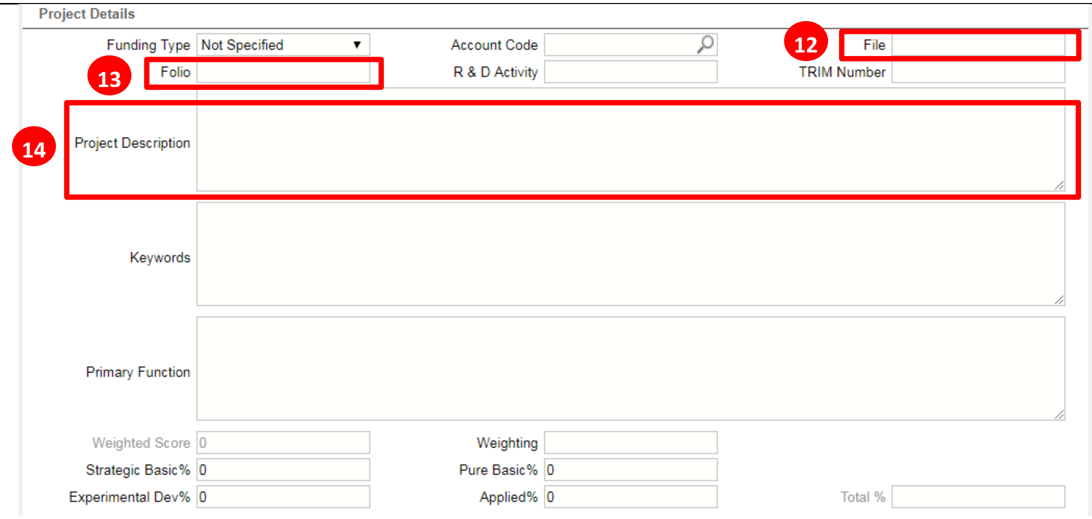


the Funding Module (System -> General -> Fund Scheme) 5. Enter the **Start date** by clicking in the field and selecting the date using the calendar that pops up. This field refers to the proposed start date of the project 6. Enter the **End date** by clicking in the field and selecting the date using the calendar. This field refers to the expected end date of the project 7. Enter the **Project status** by selecting an option within the dropdown list. When an application is submitted select "Application Submitted" 8. The **Progress status** is defaulted to 'Not Specified'. Leave as is 9. The **Project Entry status** is defaulted to 'Not Specified'. Leave as is	
10. Enter the **Date applied** by clicking in the field and selecting the date using the calendar. This is the date the application was submitted to the Funding Body 11. Enter the **Date received** 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.	

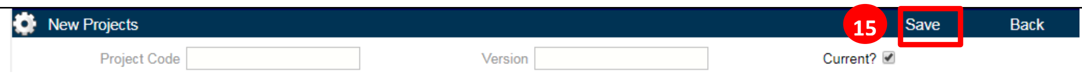
12. Enter the **File** field only if the application has a unique ID, e.g. APP1234567 (usually this field only needs to be completed for ARC and NHMRC schemes)

13. Leave the **Folio** field blank

14. Enter a short project summary in the **Project Description** field. Add a short summary of the application. Lay/media summaries or Abstracts are often found at the start of an application.



15. Click on the **Save** link to save the details. This will show other Related Items. This will also generate a **Project Code**

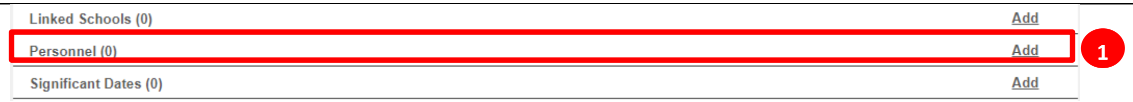


Enter Project Details – Subsection – Personnel (Add Primary Contact)

<table>
<tr>
<td>

1. Go to the **Personnel** subsection and click the **Add** link. This will display the Personnel subsection form

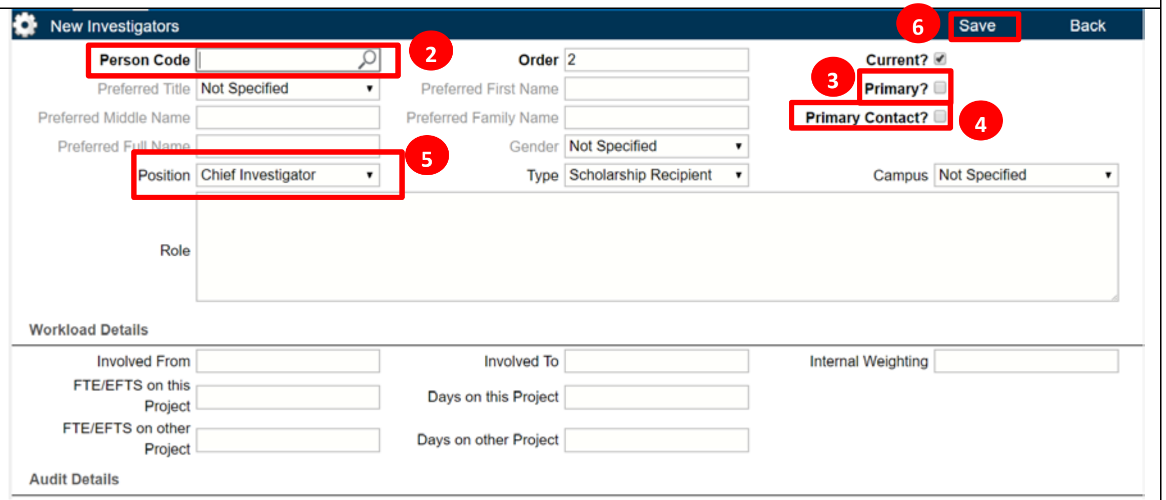
</td>
<td>



</td>
</tr>
<tr>
<td>

2. Enter the employee number of the lead RMIT investigator into the **Person Code,** or use the search facility. Once you have entered a code, some sections will auto populate
3. Click the **Primary** checkbox to set the Personnel's organisation unit as the primary organisation unit for the project. This will automatically populate the 'Primary Org. Unit' in the Core Details section for the project
4. Click the **Primary Contact** checkbox to set the personnel as the primary contact. This will automatically populate the personnel as the 'Primary Contact' in the Core Details section for the project.
5. Select 'Chief Investigator' from the **Position** dropdown field
6. Click **Save** to save the changes

</td>
<td>



</td>
</tr>
</table>

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

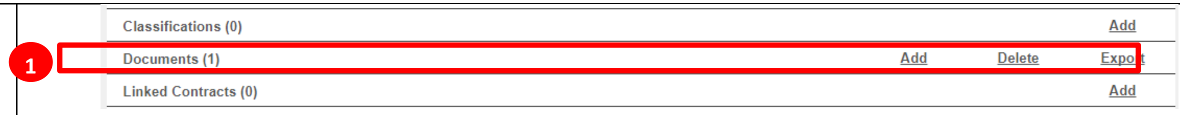
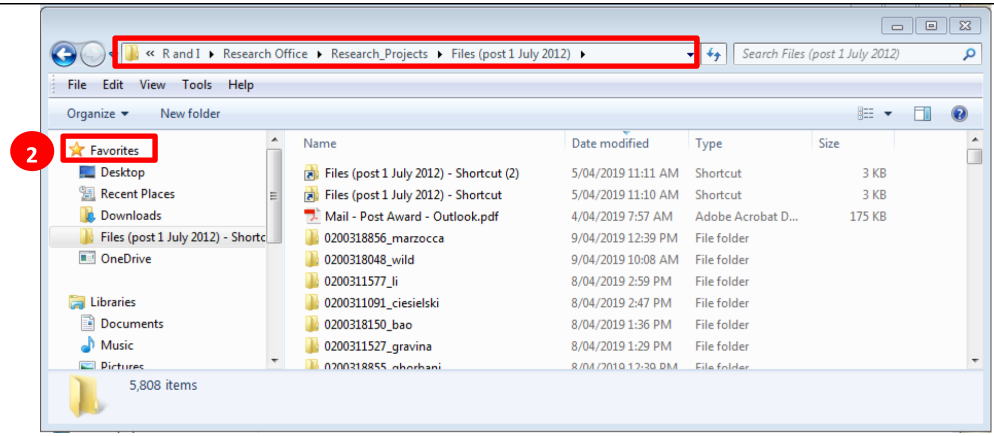
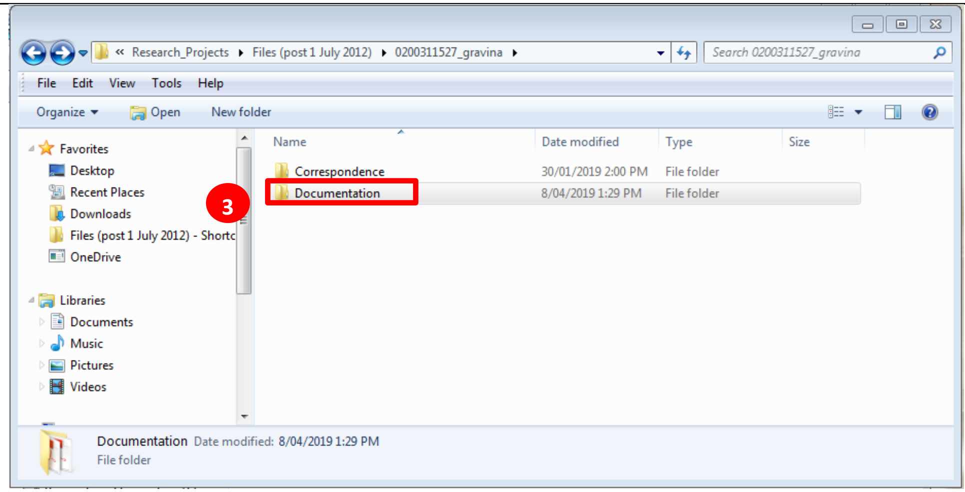
   The RM number is at the top of the "Project Data Entry" window.

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.

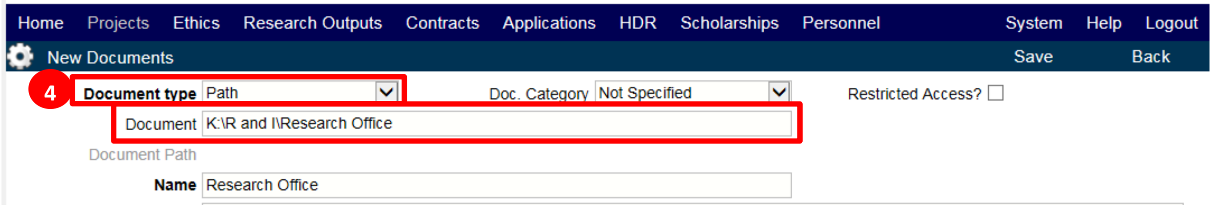
   Use the filename conventions:

   - RMNumber_preaward coversheet (eg 0200303476_preaward coversheet.pdf)
   - RMNumber_application (eg 0200303476_application.pdf)

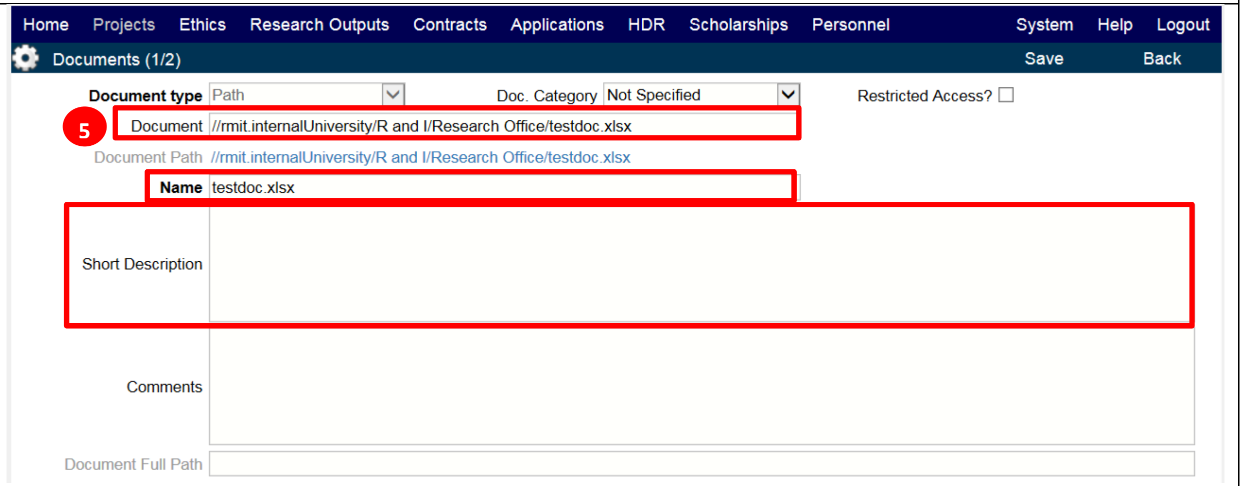
   NOTE: Ensure the version of the Coversheet you copy into this folder is the version that has both the School and R&I endorsement email trail. Ensure both are saved as PDFs.

1. Go to the **Documents** subsection and click the **Add** link. This will display the Documents subsection form	
2. Open up the shared drive and put \\rmit.internal\University\R and I\Research Office\Research_Projects\Files (post 1 July 2012) into the file path and save it to your **Favourites** in the left hand panel by dragging the folder icon at the start of the file path to your **Favourites** folder. You will only need to do this the first time. The file path will continue to be saved in your Favourites from now on.	
3. Select the **Documentation** folder in the e-file you just created for your application. Click in the address field and **copy** the path	

4. Paste the file path into the **Document** field in RM

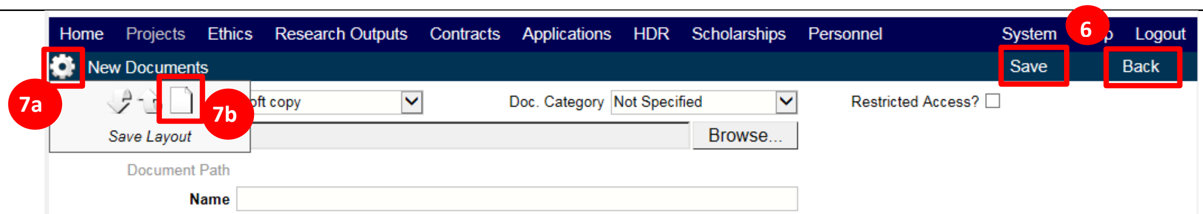


5. The **Short Description** should auto populate to **Documentation** as per the folder



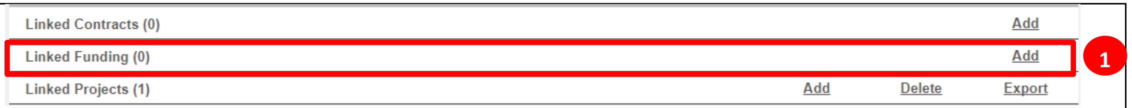
6. Click **Save** to save the changes. Otherwise click **Back** to return to the previous page

7. To add more documents:
   i. Mouse-over the **Cog** icon
   ii. Click on the **Copy** icon and
   iii. Repeat steps 3 to 9



Enter Project Details – Subsection – Linked Funding

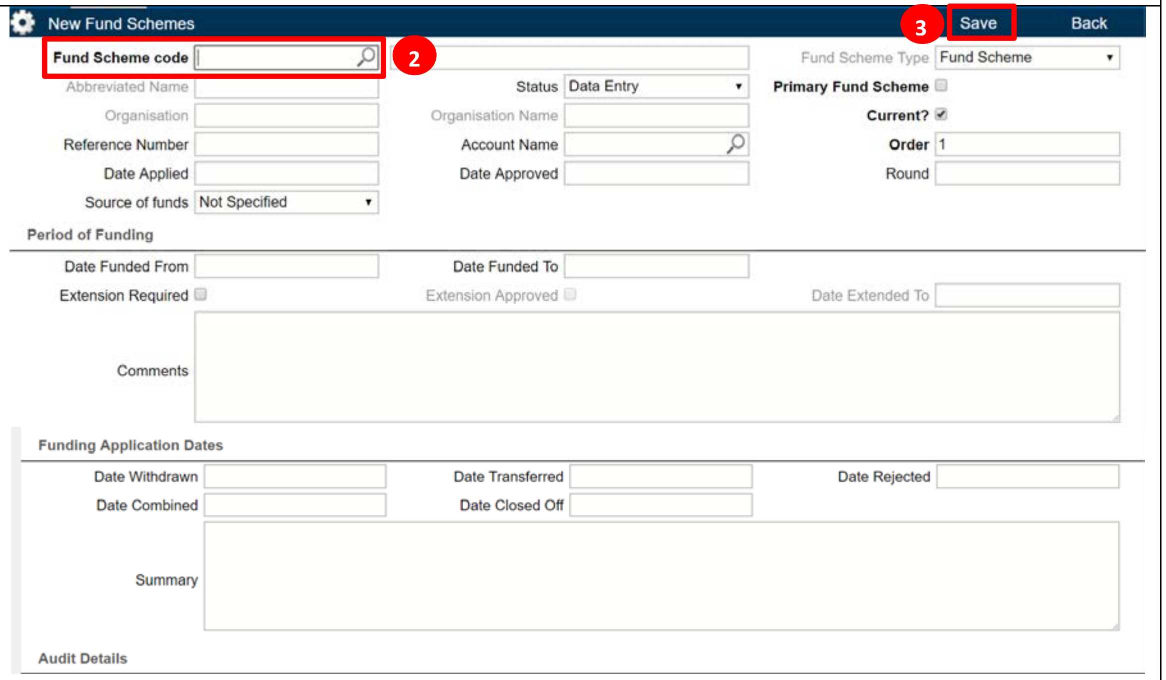
1. Go to the **Linked Funding** subsection and click on it or click the **Add** link. This will display the Linked Funding subsection form



2. Enter the Fund Scheme Code* into the **Fund Scheme Code** field**,** or use the search facility. Once you have entered a code, some sections will auto populate and the other sections can remain blank

*If a fund scheme code has not been created for the application you are entering, email Post-Award who will create the Fund Scheme Code for you, as well as provide you with the Government Category number

3. Click **Save** to save the changes

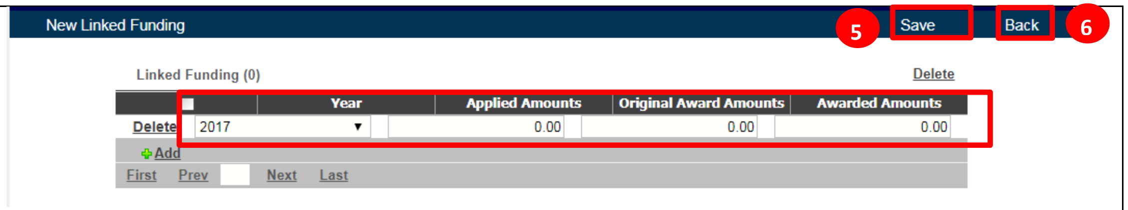


4. Go to the **Linked Funding** subsection and click on it or click the **Add** link. This will display the Linked Funding yearly breakdown subsection form

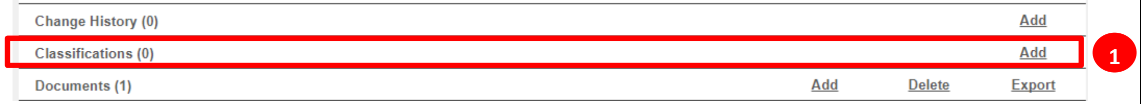
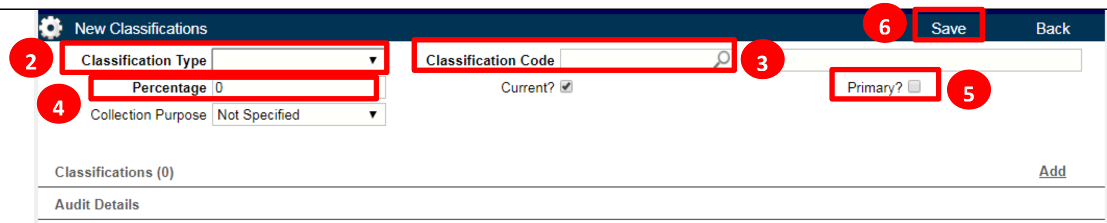
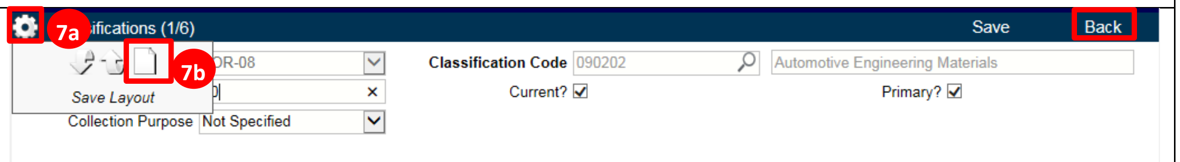
Enter the total funding request in the first budget year. It is not necessary to break down these amounts by funding year

5. Click **Save** to save the changes

6. Click **Back** to return to the previous page

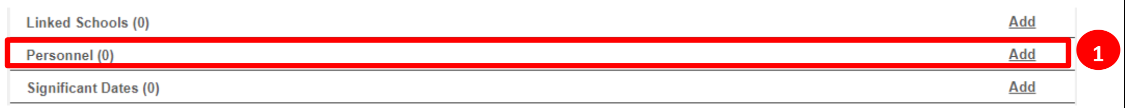
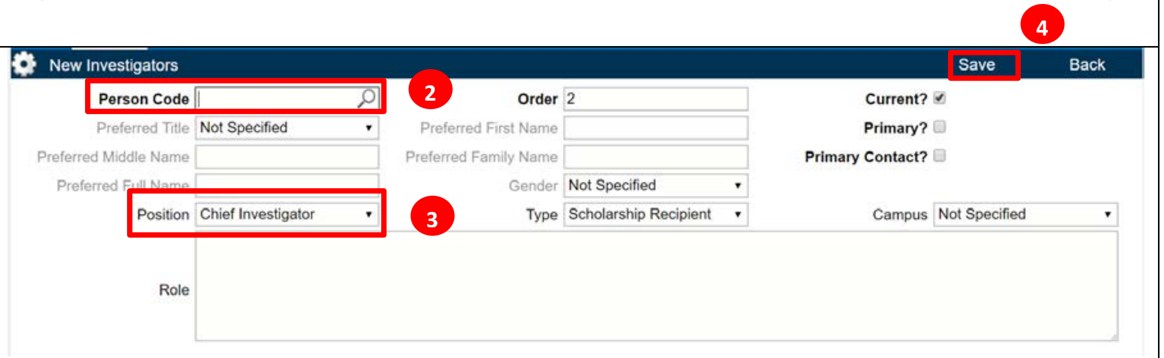
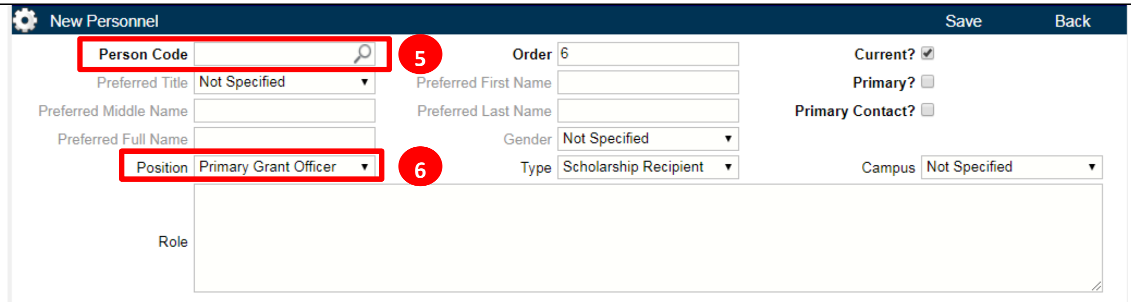


Enter Project Details – Subsection – Classifications

1. Go to the **Classifications** subsection and click the **Add** link. This will display the Classifications 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.	
2. Select a **Classification Type** from the drop down list 3. Enter the Classification Code into the **Classification Code** field**,** or use the search facility. Once you have entered a code, some sections will auto populate 4. Ensure the total percentage for each Classification type adds up to 100 % in the **Percentage** fields 5. Click the **Primary** checkbox for the first nominated code 6. Click **Save** to save the changes	
7. To add more codes: a. Mouse-over the **Cog** icon b. Click on the **Copy** icon and c. Repeat steps 2 to 6	

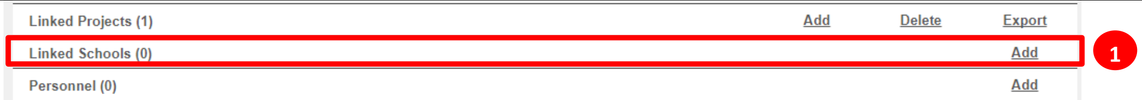
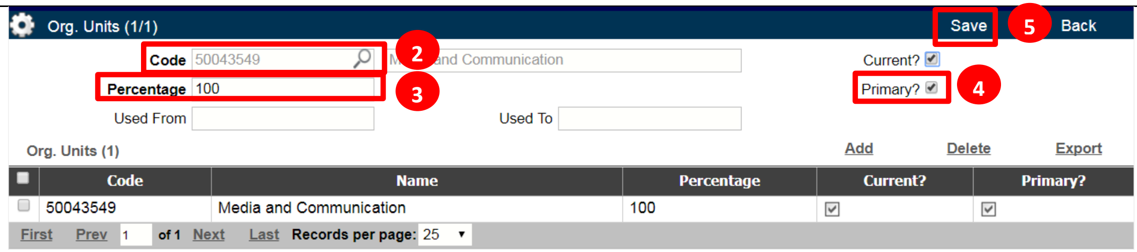
Otherwise click **Back** to return to the previous page	

Enter Project Details – Subsection – Personnel

1. Go to the **Personnel** subsection and click the **Add** link. This will display the Personnel subsection form	
2. Enter the employee number of any other RMIT investigators into the **Person Code** or use the search facility. Once you have entered a code, some sections will auto populate. 3. Select **Position** dropdown field 'Chief Investigator'. (Do not tick boxes for 'Primary' or 'Primary Contact') 4. Click **Save** to save the changes.	
5. Enter the employee number of the grant reviewer into the **Person Code** or use the search facility. Once you have entered a code some sections will auto populate. 6. Select Position dropdown field 'Primary Grant Officer'. (Do not tick boxes for 'Primary' or 'Primary Contact')	

7. Click **Save** 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 does not auto populate after entering the **Personnel** in, and/or for staff outside the 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	
2. Enter the School Code into the **Code** field**,** or use the search facility. Once you have entered a code, some sections will auto populate 3. Enter the percentage % in the **Percentage** field. Percentages should add to 100% 4. Click the **Primary** 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%	

5. Click **Save** to save the changes