Fund Schemes

This guide shows staff how to set up a fund scheme record for the ResearchMaster (RM) database. Fund scheme records are created by staff in the Research and Innovation Portfolio (R&I).
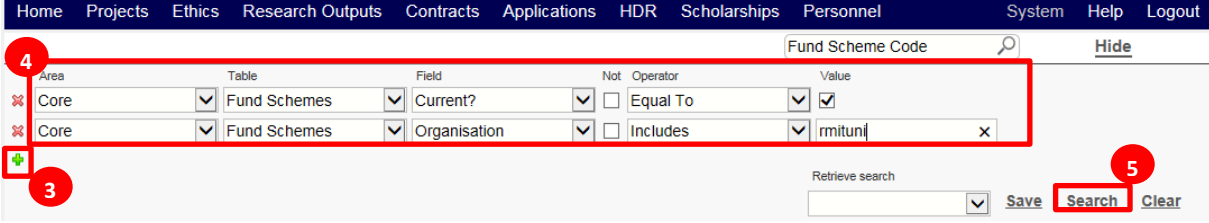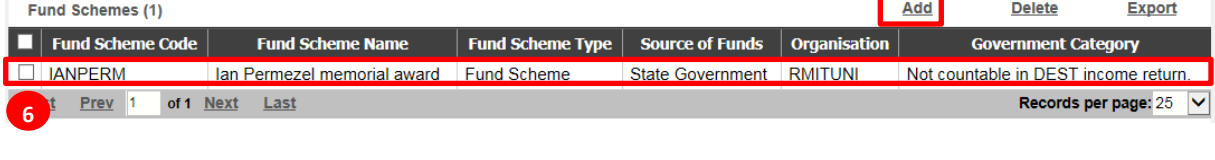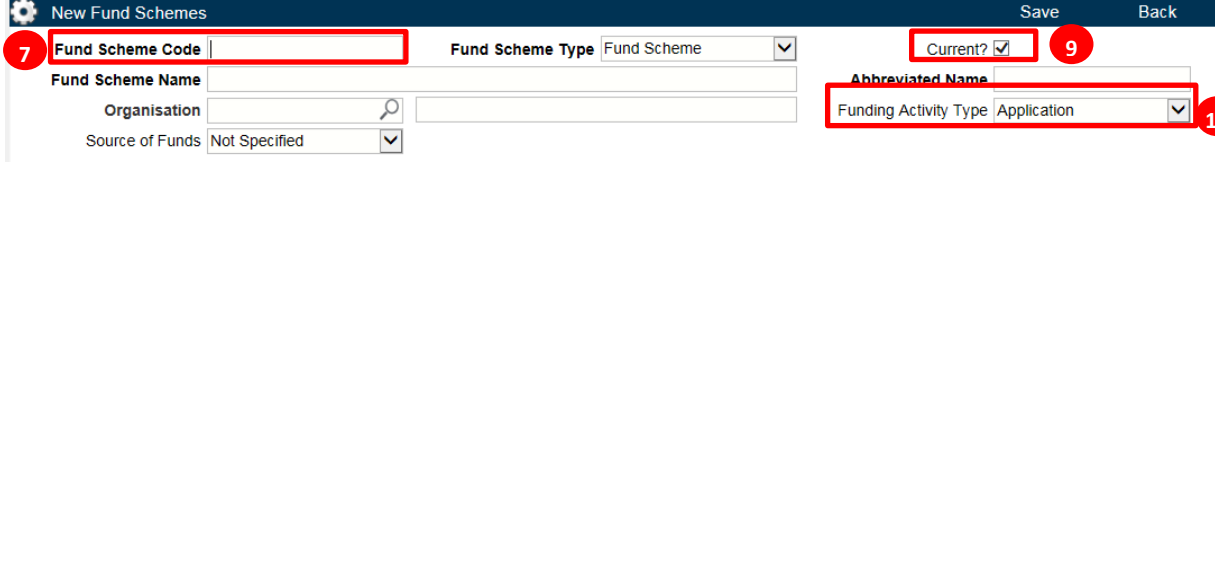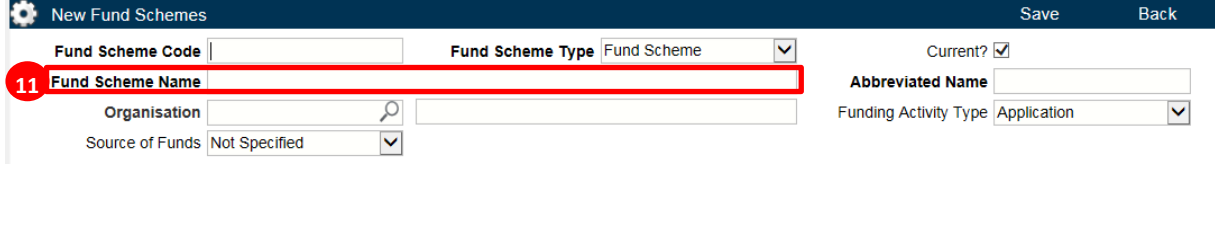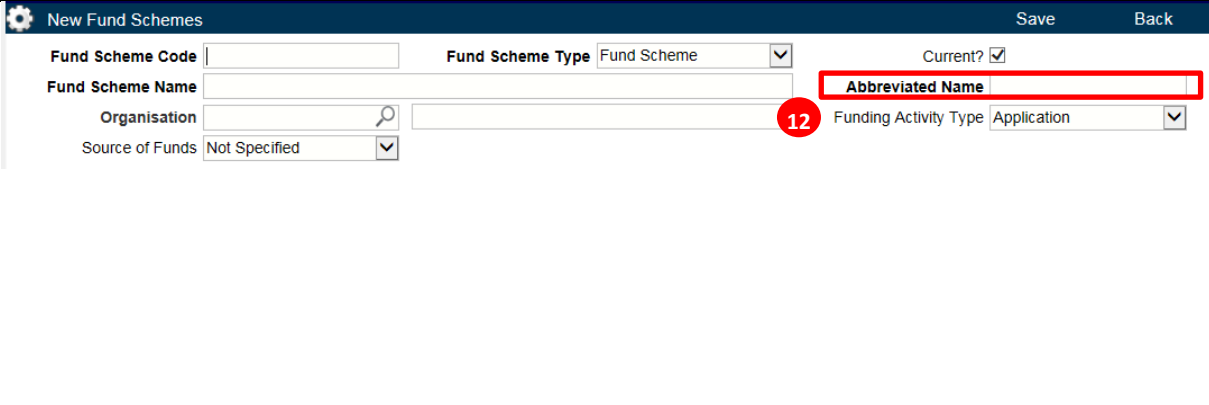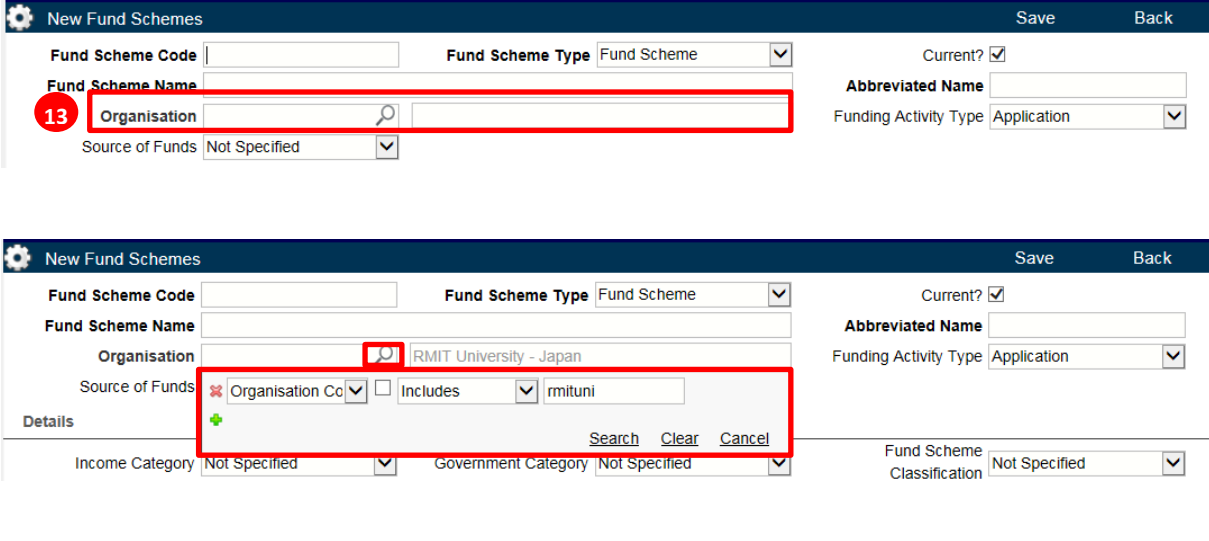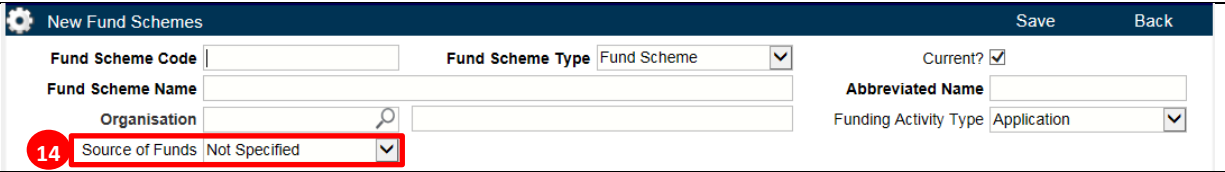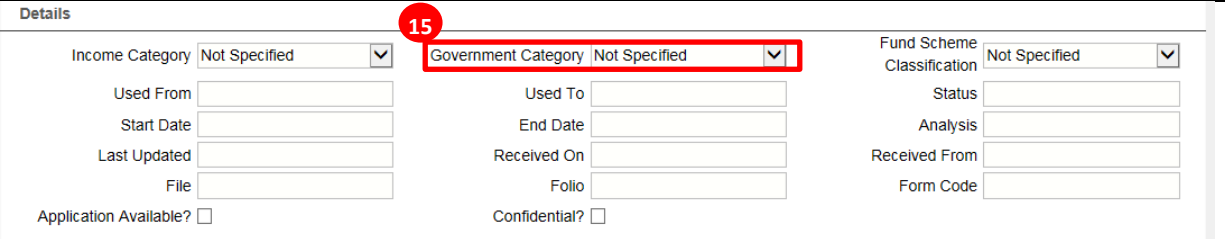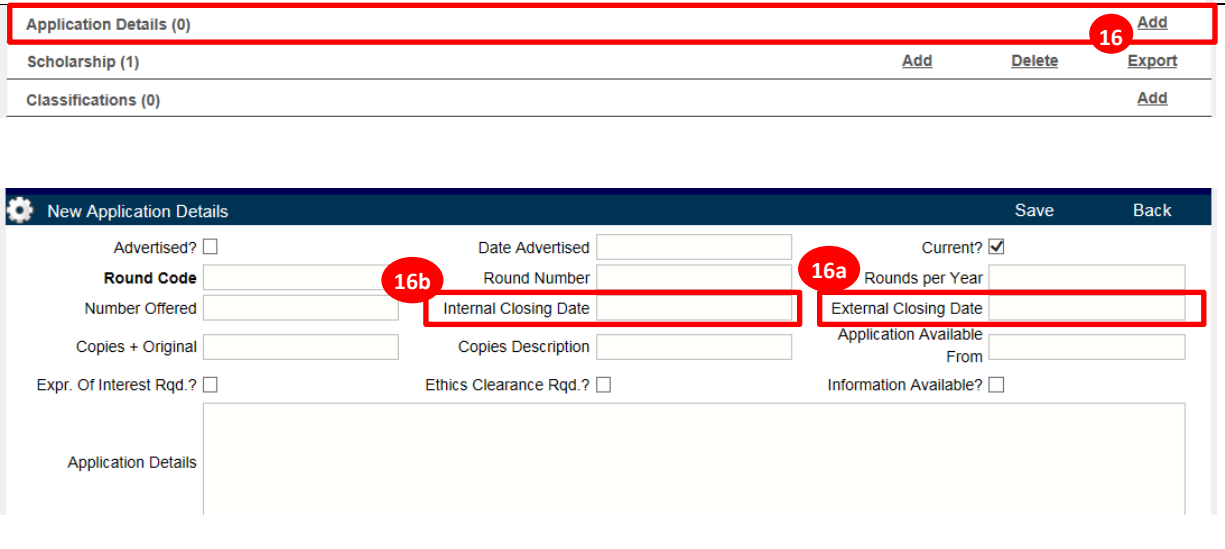
Guidelines and rules

- A ResearchMaster login with applicable access is required to complete this task.
- Fund Schemes records contain data about the source of funding as well as the Government category and Sub-category of the funding. Fund Schemes are attached to research project records in the Projects Module of ResearchMaster.
- Organisations may have multiple fund schemes, one for each of the following type of funding: 1. Schemes in the Australian Competitive Grants Register (ACGR), 2. Other Competitive Research, 3. Contract Research, and 4. Scholarships. In addition, each fund scheme round should have a distinctive fund scheme record for Pre-award to track the internal and external closing dates. For example, ARC Linkage Projects may have two rounds of applications within a year. There should be two fund scheme records set up for that year: e.g. ARCLP10R1 Australian Research Council Linkage Project 2010 Round 1 and ARCLP10R2 Australian Research Council Linkage Project 2010 Round 2.
- As RMIT is required to report its research funding to various government bodies, keeping accurate fund scheme records is very important.

Create a new Fund Scheme

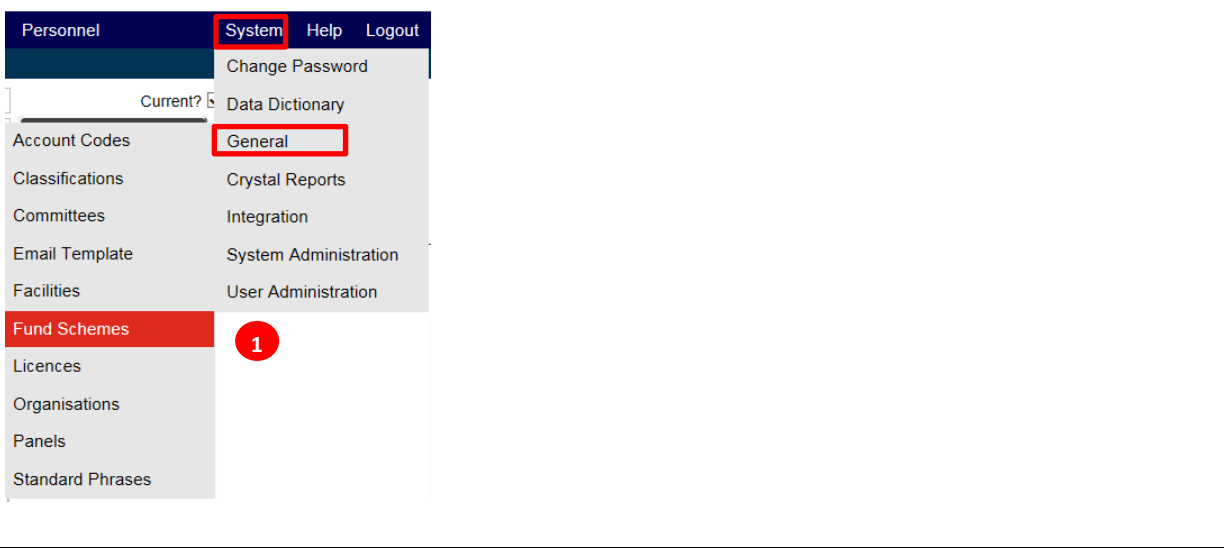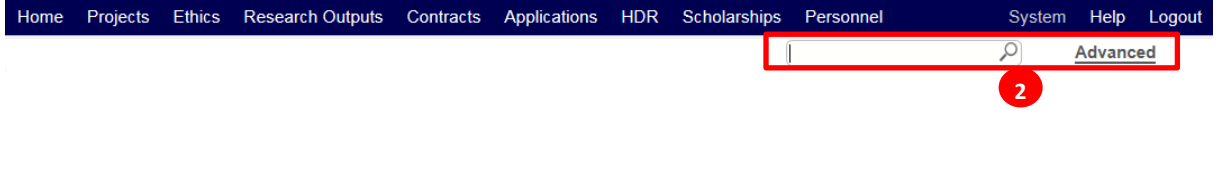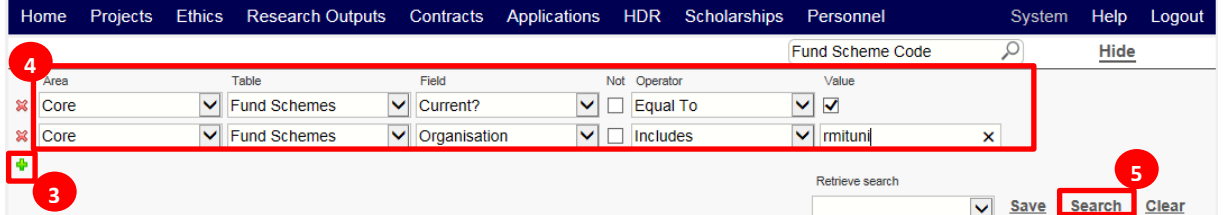|		
1.	Navigate to System > General > Fund Schemes	
2.	Check if a Fund scheme record already exists by searching for the fund code in the quick search or click on **Advanced** link to display the advance search feature.	
3.	By default the search criteria is for current records. Leave this as is. Click **+** to add another search criteria.	
4.	Update the search criteria to search by the linked organisation: • The **Area** and **Table** will be preselected as 'Core' and 'Fund Schemes' respectively by default • Change **Field** to 'Organisation' • Change **Operator** to 'Includes'	

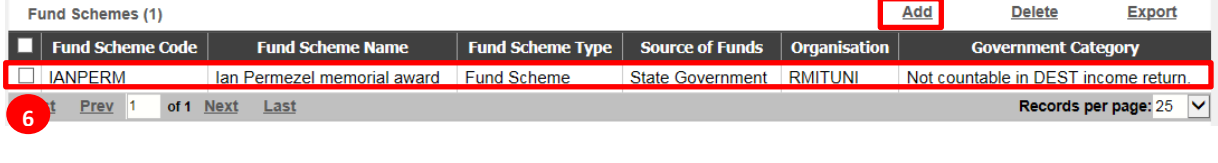|	
• Enter the organisation code into the **Value** field 5. Click **Search**	
6. If the record found, click on the row to modify the record. Otherwise, click **Add** to create a new record.	Fund Schemes (1) Add Delete Export ☐ **Fund Scheme Code** **Fund Scheme Name** **Fund Scheme Type** **Source of Funds** **Organisation** **Government Category** ☐ IANPERM Ian Permezel memorial award Fund Scheme State Government RMITUNI Not countable in DEST income return. **6** t Prev 1 of 1 Next Last Records per page: 25 ▾
7. Enter/Create a **Fund Scheme Code** This is a unique alpha numeric code that will be used to link the fund scheme record to various tables within the database, typically, the Fund Scheme name initials plus funding type, year and round works best. (e.g. ARCDP12R1, BOEINGSCH, BOEINGCON). 8. By default the **Fund Scheme Type** is set to 'Fund Scheme'. Select 'Scholarship' for all scholarships. 9. By default **Current** is ticked. Untick if this record is no longer current. 10. Select the appropriate **Funding Activity Type**.	⚙ New Fund Schemes Save Back **7** **Fund Scheme Code**	**Fund Scheme Type** Fund Scheme ▾ Current? ☑ **9** **Fund Scheme Name** **Abbreviated Name** **Organisation** 🔍 **Funding Activity Type** Application ▾ **10** Source of Funds Not Specified ▾
11. Enter the **Fund Scheme Name** This is the official full Fund Scheme name plus funding type, funding year and round. Do not use abbreviations except for organisation names. Enter 'ORGANISATION NAME Contract', 'ORGANISATION NAME Grant' or 'ORGANISATION NAME Scholarship' as	⚙ New Fund Schemes Save Back **Fund Scheme Code**	**Fund Scheme Type** Fund Scheme ▾ Current? ☑ **11** **Fund Scheme Name**	**Abbreviated Name** **Organisation** 🔍 Funding Activity Type Application ▾ Source of Funds Not Specified ▾
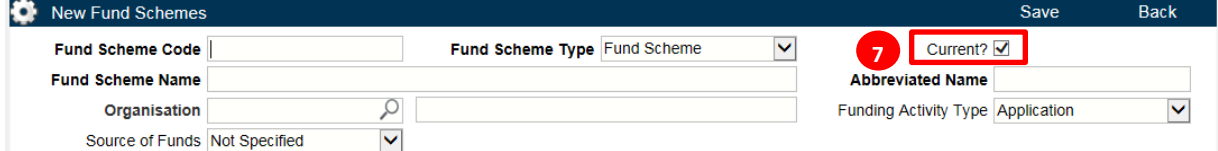
appropriate. (e.g. ARC Discovery Projects Grant 2012 Round 2) •	
12. Enter the **Abbreviation** Like the Fund Scheme Code, descriptive acronyms, contractions and key words work well. Where possible, use the same abbreviation as used for the Fund Scheme Code with spaces in between the Organisation and Fund Scheme abbreviations, less year and round information. (e.g. ARC DP, CRC WM) This enables easy grouping of multiple fund scheme rounds over multiple years.	
13. Link an **Organisation** This is the Organisation that is providing the funding under this fund scheme. Each organisation may have many different fund schemes, but each fund scheme may only have one organisation. If you know the Organisation Code, then enter it into the Organisation field and press 'Enter'. If you do not know the Organisation Code, then use the search facility to look-up and select the organisation. You can do this by clicking on the magnify glass icon.	

14. Select the **Source of Funds** This is a required field for HERDC government reporting. Refer to the latest Specifications document for the category definitions.	**New Fund Schemes** Save Back Fund Scheme Code [ ] Fund Scheme Type [Fund Scheme ▾] Current? ☑ Fund Scheme Name [ ] Abbreviated Name [ ] Organisation [🔍] [ ] Funding Activity Type [Application ▾] **14** Source of Funds [Not Specified ▾]
15. Select the **Government Category** This is a required field for HERDC government reporting. Refer to the latest Specifications document for the category definitions.	**Details** **15** Income Category [Not Specified ▾] Government Category [Not Specified ▾] Fund Scheme Classification [Not Specified ▾] Used From [ ] Used To [ ] Status [ ] Start Date [ ] End Date [ ] Analysis [ ] Last Updated [ ] Received On [ ] Received From [ ] File [ ] Folio [ ] Form Code [ ] Application Available? ☐ Confidential? ☐
16. To add the External and Internal Close, click **Add** against the' Application Details' related item section a. Enter the **External Close -** This is the application due date at Funding Body b. Enter the **Internal Close -** This is the application due date at RMIT	**Application Details (0)** **16** Add Scholarship (1) Add Delete Export Classifications (0) Add **New Application Details** Save Back Advertised? ☐ Date Advertised [ ] Current? ☑ **Round Code** [ ] Round Number [ ] **16a** Rounds per Year [ ] Number Offered [ ] **16b** Internal Closing Date [ ] External Closing Date [ ] Copies + Original [ ] Copies Description [ ] Application Available From [ ] Expr. Of Interest Rqd.? ☐ Ethics Clearance Rqd.? ☐ Information Available? ☐ Application Details [ ]
17. Click **Save** to save the changes	**Fund Schemes (1/1)** Save Back **17**

Closing a Fund Scheme

Sometimes it is necessary to close a fund scheme record as it may have ceased to exist and should no longer be used. Rather than deleting the fund scheme, it should be marked as not current to maintain the data history.

1.	Navigate to System > General > Fund Schemes	
2.	Use the quick search to search for the fund scheme by entering the fund code and clicking on the magnify glass icon. Alternatively click on **Advanced** link to display the advance search feature.	
3.	By default the search criteria is for current records. Leave this as is. Click **+** to add another search criteria. 4. Update the search criteria to search by the linked organisation: • The **Area** and **Table** will be	

preselected as 'Core' and 'Fund Schemes' respectively by default • Change **Field** to 'Organisation' • Change **Operator** to 'Includes' • Enter the organisation code into the **Value** field 5. Click **Search**	
6. If the record is found, click on the row to modify the record.	Fund Schemes (1) Add Delete Export ☐ **Fund Scheme Code**	**Fund Scheme Name**	**Fund Scheme Type**	**Source of Funds**	**Organisation**	**Government Category** ☐ IANPERM Ian Permezel memorial award Fund Scheme State Government RMITUNI Not countable in DEST income return. Prev 1 of 1 Next Last Records per page: 25
7. Uncheck the **Current** checkbox.	New Fund Schemes Save Back Fund Scheme Code [ ] Fund Scheme Type [Fund Scheme ▼] Current? ☑ Fund Scheme Name [ ] Abbreviated Name [ ] Organisation [ ] 🔍 [ ] Funding Activity Type [Application ▼] Source of Funds [Not Specified ▼]

8. Enter the date in the **Used To** field This is the date indicating until when the fund scheme was current	**Details** Income Category Not Specified Government Category Not Specified Fund Scheme Classification Not Specified Used From **Used To** Status Start Date End Date Analysis Last Updated Received On Received From File Folio Form Code Application Available? ☐ Confidential? ☐
9. Click **Save** to save the changes	⚙ Fund Schemes (1/1) Save Back