Research Management System (RMS)

User Guide
Version 9
March 2011

<u>Creating a Research Grant Proposal record on the RMS</u>

1   First Time Login

You may require Java to be installed on your computer to access the Research Management System. If this is the case please continue to stage 1, if it is already installed, please go to stage 2

Stage 1

- The RMS access URL is

http://crmlive.integration.manchester.ac.uk/OA_HTML/AppsLocalLogin.jsp

This will take you to the login page (figure 1). The system is accessed via your web browser and should be saved as a favourite. Simply select *Add Favourites* as usual.
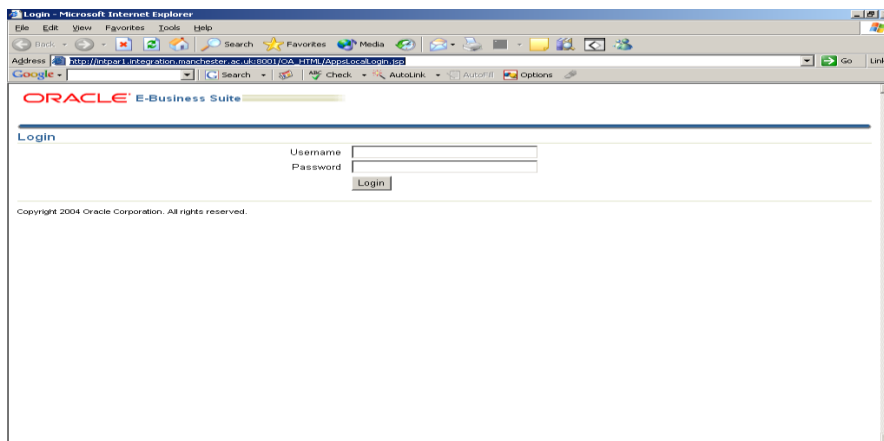
Figure 1 - Login Page for CRMPROD

- Ensure that the PC has ActiveX controls set to prompt in the security settings. From Internet Explorer go to Tools Menu, Internet Options, and then choose the Security Tab. Next, as shown in figure 2, go to Internet, Custom Level, here look for all Active-X settings and if they are disabled set them to prompt. Save.
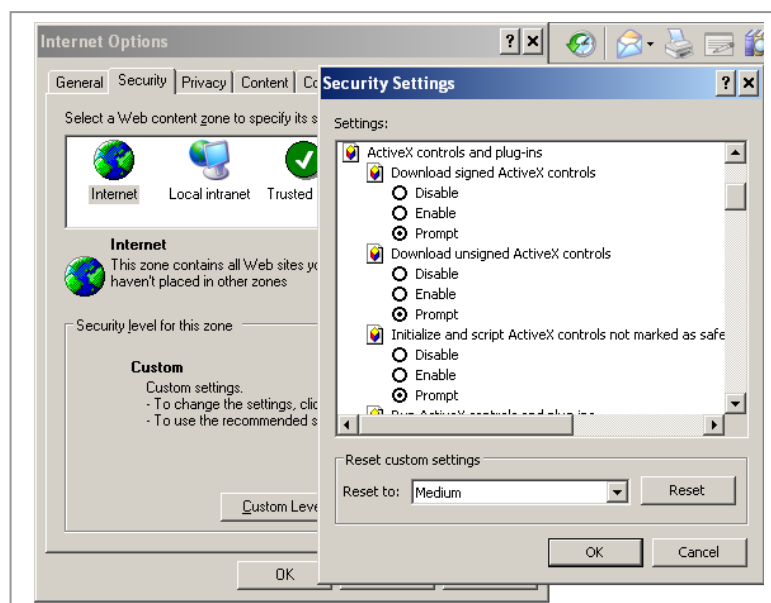
Figure 2. Setting up ActiveX controls

- JInitiator will also need to be installed on the PC to run the web forms. It will prompt you to do this when you try to access a screen for the first time. All you need to do is select any default prompts that it asks you to agree, and then it will do the rest itself. A black DOS box will appear on the screen, do not shut this down. Once JInitiator has been successfully installed it will close down itself and take you to the screen automatically.

  NOTE :- You must have admin rights on your pc to be able to download Jinitiator. If you don't then please contact your IT support.

- Once you have gone in for the first time successfully you can, if you wish, disable ActiveX controls on the internet which you previously set to prompt.
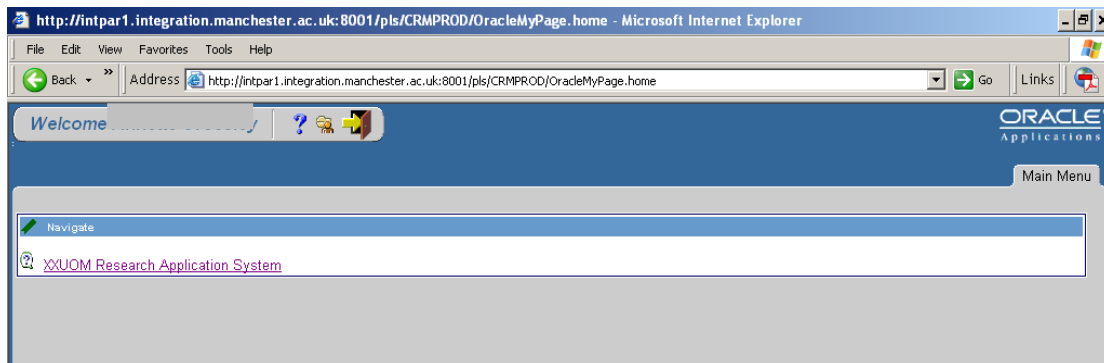
Stage 2

Open the RMS URL:

http://crmlive.integration.manchester.ac.uk/OA_HTML/AppsLocalLogin.jsp

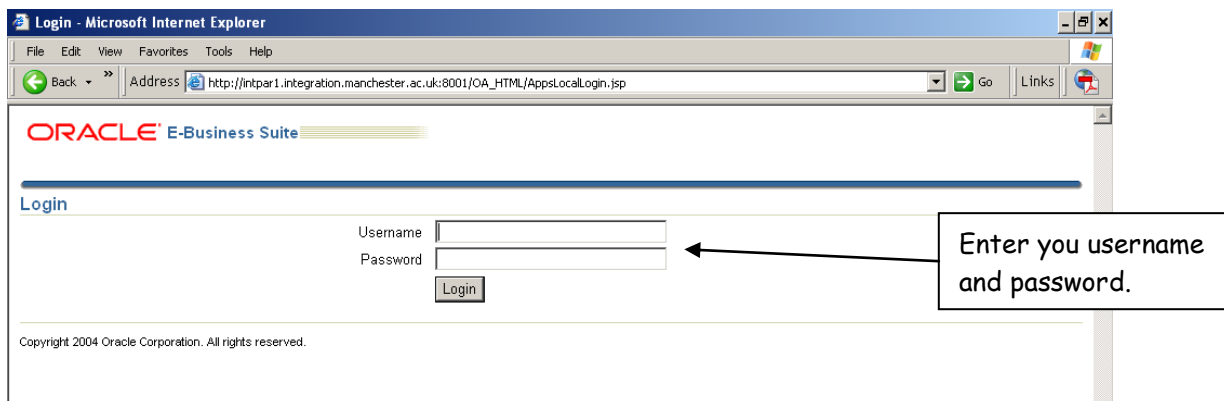The first time you login, you will asked to change your password from the one you have initially been set up with.

After resetting your password, the following screen should appear. Click on this link to take you directly to the Research Management System.
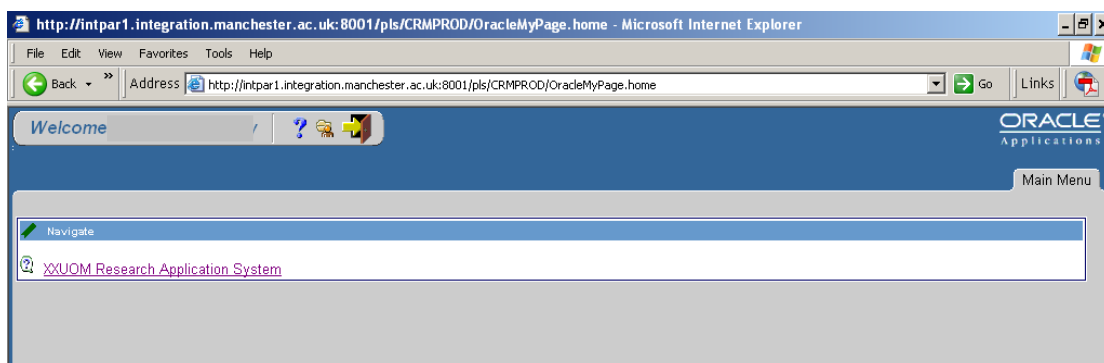

2   Repeat Login

Open the CRM URL:
http://crmlive.integration.manchester.ac.uk/OA_HTML/AppsLocalLogin.jsp

Enter you username and password.

The following screen should appear. Click on this link to take you directly to the Research Management System.

3   Function Keys

F11   Query Mode

Ctrl + F11   Execute Query

   Insert Record

   Delete

   Any cell with this symbol represents a cell with a search facility/drop down options

   Print Page

4a   Creating an INPREP record using the RMS Wizard

A blank record should automatically appear.
In order to check that you are now in insert mode - the screen will be showing a record status of 'IN PREP' and the word 'MONTHS' will be showing in the 'months' box.

The optional RMS wizard can be located through the RMS main screen in the 'Tools' menu. You do not have to log into the RMS in any different way.

All mandatory information required to save a basic record is highlighted in yellow as it does in the main RMS. The system defaults the record to be a grant without an approval form.

Defaults to a Research Grant without an approval form

To continue to the next page, click on either the next button or the next section tab.

The system defaults to show your School as the Principal School for the project. The system also gives you the option to retrieve Investigators Previous Funders to speed up search time for Funder details.

Your school will be the automatic default for the Principal School

Investigators 'previous funders' is the default to narrow the Funder search

The final screen lets you review the information you have entered and requires the input of the Short Title which is the final part of Mandatory information to create an 'INPREP'.

To go back to any sections, click on either the back button or the relevant section tab.

To generate the RMS record, click on Finish

After creating your RMS record you can go directly to the full RMS record to complete further information, create another basic record or Close the RMS Wizard. The record created will have an 'INPREP' status.

Click 'Open Project' to go into the 'INPREP' record to add full RMS details.

4b   Creating an INPREP record not using the RMS Wizard

A blank record should automatically appear.
In order to check that you are now in insert mode - the screen will be showing a record status of 'IN PREP' and the word 'MONTHS' will be showing in the 'months' box.

The following data should now be completed:-

1. Type – All Research Project Types are prefixed 'R'. All others are Non-Research and do not currently interface into Oracle Financials Projects. Click [...] and choose the appropriate Type e.g. RCG for Research Council Grant.

2. Application Short Title – If a research project type has been selected the short title will automatically be prefixed with an 'R'. The short title must begin with a three letter school code which will automatically be generated after you have added School/Division/Group details against the Principal Investigator. The remainder of short title is for you to decide how to complete but it must be unique within Oracle Financials.

    NB: The FEC Field next to the Application Short Title is an optional field for you to input a pFACT Costing Reference number.

3. Application Title – Enter full project title. This must be unique.

4. Proposed Start Date – Click [...] for the calendar function and select the appropriate date.

5. Duration – This is a data entry field and defaults to months e.g. 36 months but the option to record the duration in days or years is also available. Entering the duration automatically populates the Proposed End Date field.

6. School – Click [...] and select the appropriate School. This automatically populates the Faculty information field.

7. Approval Form – Please state Y or N to state if an appropriately signed Approval Form has been completed for the proposal.

8. Programme/Scheme – Click [...] and select a programme scheme from the alphabetically ordered list of different programmes. If the programme scheme name you require does not appear please email the Research Operations Team – researchoperations@manchester.ac.uk to request its addition. Where the proposal has no specific Programme Scheme select the generic 'Research Grant' (all contracts are entered by the Research Funding Services and the generic 'Research Contract' scheme would be selected if the scheme was unknown).

    NB: The Comments box after the Programme Scheme field is for the inclusion of any relevant details, comments or changes you wish to attach to the RMS record e.g. "this is a grant transfer from University X "

When all the data has been entered, press save.

5a   Inputting Funder details.

Click on the Funder Button

NB. If the RMS Wizard was used to create the INPREP record then points 1 & 3 do not apply.

1.   Click [...] in the Party Number to select your required Sponsor. The screen below will appear:

Search for the required sponsor using % as a wildcard. When you have chosen your Funder, click OK. If you cannot find the funder you require please contact researchoperations@manchester.ac.uk
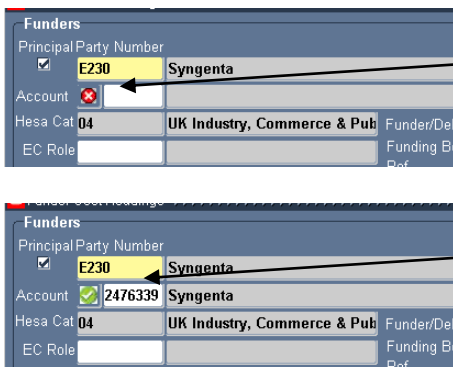
2.   Click [...] on Account and select the account you want (some Funders will have several accounts). If the account you require is not showing it will need to be added to Oracle Financials.
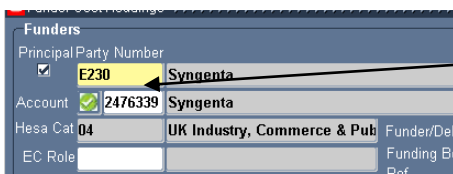
When a Research project is set to Award it triggers the interface to create an R code in Oracle Financials. If the account selected in the RMS is no longer active in Sales Ledger then this will fail the interface. Each account will flag it's validity in Oracle Financials.

A red cross indicates it is an invalid account in Oracle Financials and either
1. An account needs to be selected from the drop down list
or
2. A new account has to be created in Oracle Financials.

A green tick indicates a valid account in Oracle Financials and the projects should transfer successfully into Oracle Financials.

> A grey circle indicates that the project type is not Research and therefore does not interface into Oracle Financials.

NB The account will show an invalid account until one is selected from the drop down list.

3   Principal – tick which Sponsor is the Principle Sponsor. The box should always be ticked to identify the principal sponsor even if there is only one sponsor.

4   SME – Indicate Y if the Sponsor is a Small to Medium Enterprise. This is essential to report to HEFCE for the Higher Education Business and the Community Interaction Survey.

5   NW Based – Indicate Y if the Sponsor is based in the Northwest. This is essential to report to HEFCE for the Higher Education Business and the Community Interaction Survey.

6   Funder/Debtor – Click on Funder/Debtor and select the appropriate record from the list (see definitions below). Each funder must have the appropriate details as this is essential for the interface into Oracle Financials.

- Funder/Debtor – Indicates that the funds are coming from the same organisation as our invoices/claims are sent to e.g. a research council grant awarded directly to the University of Manchester.
- Funder – Indicates that the overall project funds are from this Funder (e.g. a research council) but our invoices/claims will be sent elsewhere. For Example, a Project is to be funded by a Research Council, but we are sending our invoices to another University as the lead Institution on a joint project.
- Debtor – Select to identify the organisation where our invoices/claims will be sent but the funds are coming from somewhere else e.g. used against the lead Institution where we send our claims/invoices.

7   Address – this is automatically populated by using the address set against the Account selected.   Contact details can be added manually.

8   Amendments – amendments to projects to be added here (see section 9)

9   EC Role – If the project is funded by the European Commission, an EC role should be assigned to each organisation recorded in the Funder page.

10 Funding Body Ref – the reference given by the Funder should be entered here.

NB. The information recorded in points 4 & 5 is used for the HEBCIS survey (Higher Education, Business and Community Interaction Survey, a statutory return issued by HEFCE).

5b   Inputting Proposal Budget details.

7. Cost Headings - Click on the Cost Headings button against the Funder you want to add budget details against.

Click to open Cost Headings page to update budgets.

1. On the Funder Cost Headings screen there are two headings for the Bid budget that you must complete. The full FEC cost (UoM Bid fEC) and the funder's contribution (Funder Bid Revenue) must be input in full.

2. A default list of cost headings automatically appears for completion. If another cost heading is required, click an empty field in the Group column and use the tool to list

all available cost heading in use. If you want to delete a default cost heading, click on the one you want to delete then click on ![delete icon]

3. The School Contribution for fEC is a self calculating figure and will be the difference between the Funder Bid Revenue column and the UoM Bid fEC column.

Budgets

UoM Bid fEC – you should enter the Full Economic Costs including inflation at University rates as per your pFACT costing (Institution Cost).   You should exclude any part of the budget that we will be subcontracting out. Any details of a subcontract should be recorded in the External Participants page.

Funder Bid Revenue – you should enter the amounts you would expect to receive from the funder should the bid be successful.   Any details of a subcontract should be recorded in the External Participants page.

NB: Some funders do not allow inflation to be included at the application stage or apply a set inflation rate which is different to the University standard rate. Care should be taken to ensure that the Bid revenue budget is the same as the one requested and submitted to the funder. An example is given below for information.

Example:
Research Council Bid

Group	Description	UoM Bid fEC	Funder Bid Revenue	UoM Award fEC	Oracle Award Budget	Funder Award Revenue	Comments
A0101	Staff academic	0.00	0.00	0.00	0.00	0.00	
A05	Travel and subsistence	1,030.00	800.00	1,030.00	1,010.00	808.00	Travel at £1000
A06	Equipment	0.00	0.00	0.00	0.00	0.00	
A07	Consumables	515.00	400.00	515.00	505.00	404.00	Consumables of £500
A10	DA Estates costs	13,661.00	10,610.00	13,661.00	13,395.00	10,716.00	Lasb (£13,263)
A12	DA Staff costs	29,852.00	23,186.00	29,852.00	29,272.00	23,418.00	Grade 6, pt 1 (£28,983
A14	DA Indirect costs	40,254.00	31,266.00	40,254.00	39,743.00	31,578.00	(£39,082)
	Totals	85,312.00	66,262.00	85,312.00	83,925.00	66,924.00	
A15	School contribution for fEC	-19,050.00		-18,388.00	-17,001.00		
	Balance	66,262.00	66,262.00	66,924.00	66,924.00	66,924.00	

Application Cost Headings for EPSRC / Engineering & Physical Sciences Research C

Back

- **UoM Bid fEC** *(RC example: 100% fEC + 3% UoM inflation)*
  The full economic cost to the University, regardless of funder application rules. This includes University inflation.

- *Funder Bid Revenue* (RC example: 80% of 100% fEC)
  The amount applied for to the funder using funder specific rules (e.g. Research Councils allow 80% submission costs of fEC after University inflation has been omitted).
- *UoM Award fEC* (RC example: 100% fEC + 3% UoM inflation)
  The full economic cost to the University, regardless of actual amount received from the funder. This includes University inflation. Awards which have been subject to a cut in funding from the original application will require a UoM fEC recost at this stage (e.g. deletion of equipment budget, reduction in number of RA's etc).
- *Oracle Award Budget (NEW)* (RC example: 100% fEC + 1% funder inflation)
  This is the total budget that will be interfaced into Oracle Financials. What is input depends on the funder rules and the University fEC policy and this may be:
  The UoM fEC Budget:
  The funders fEC Budget e.g. a Research Council grant where fEC journals using RCUK indexation rates will be utilised in Oracle so that
  Funder Award Revenue e.g. in cases where the funder pays direct costs only and fEC journals are not utilised in Oracle, such as Charity awards.
- *Funder Award Revenue (old name: Awarded Revenue)* (RC example: 80% of 101%)
  The amount of expected income the University has been awarded and will receive from the funder.

5c   Inputting Investigator Details.

Click on the Investigators Button

NB If the RMS Wizard was used to create the INPREP record then points 1, 2 & 3 do not apply for Principal Investigator. Points 2 & 3 will still apply for Co-Investigators.

1   Select the School the Investigator belongs using the ⬚ tool.

2   Select the Investigator in the same way.

3   Tick the Principal box to flag who is the Principal Investigator.

4   FTE – this is the amount of time the Investigator is to spend on the project. 1 = 100% time   0.1 = 10% time   0.05 = 5% time etc.
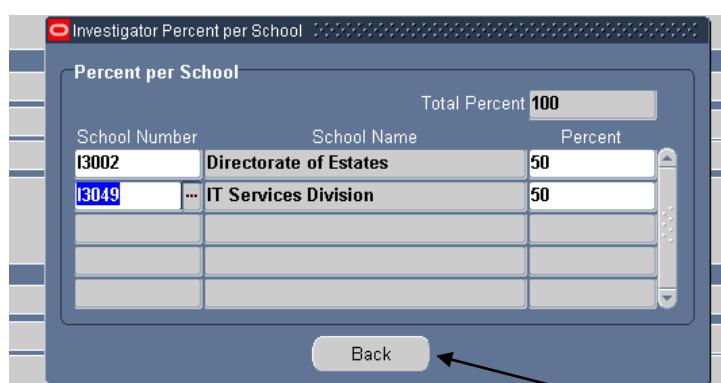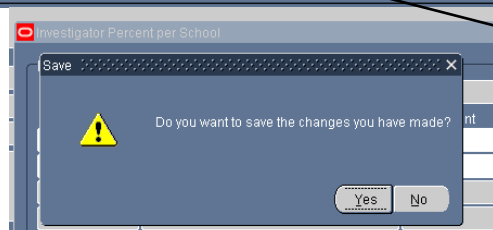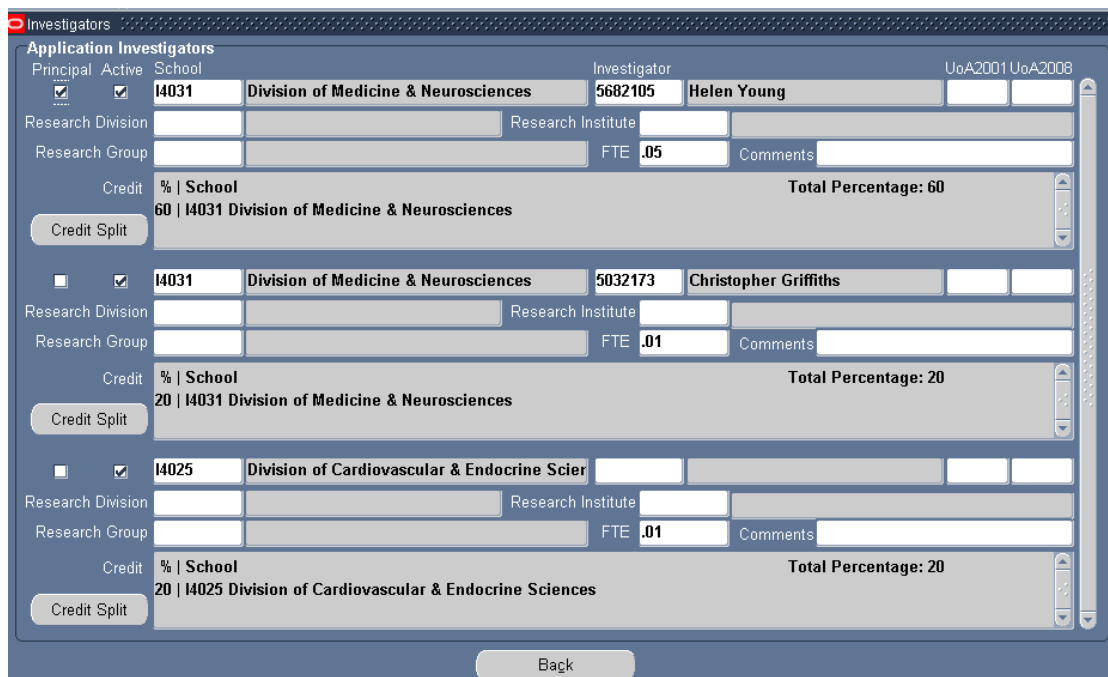
5   Research Division – If it is applicable to attach an Investigator to a specific Research Division click [···] and select the relevant Division from the list.   All Research Division are level 4 of the organisation structure. E.g. Applied Mathematics I**4**183.   Only research divisions appropriate for the School you have chosen will be available

6   Research Group – If it is applicable to attach an Investigator to a specific Research Group click [···] and select the relevant Group from the list.   All Research Division are level 5 of the organisation structure. E.g. Dermatology I**5**126.   Only research groups appropriate for the School/Division you have chosen will be available

         NB. If you enter a division or group first, the system will automatically update the School/Division with the relevant details according to the University organisation structure.

7   Research Institute – If it is applicable to attach an Investigator to a specific Research Institute click [···] and select the relevant Institute from the list. Research Institutes are recorded here as level 3 of the organisation structure. E.g. Wolfson Molecular Imaging Centre I**3**057

8   Credit Split - this is the % amount of Intellectual credit an Investigator will be assigned from this project. The amounts for all Investigators on a project must add up to 100% and only full percentages can be accepted. Credit Splits drive pre-award reporting such as apportioning proposals and awards between investigators for the OPRs and often form the starting point for RAE data gathering. *NB. There is a comments field for use to record a small amount of information relating to the investigator.*

Within the Credit Split screen, enter the percentages against as many Schools as you require for the individual investigator.

When you click on the Back button you will be prompted to save your credit split changes.

Multiple Investigators can be added in the same way.   The screen allows input of 3 Investigators. To insert further Investigators select the insert record tool [icon] located on the top left of the tool bar. The Credit % must always total 100% for the whole project.

NB *The RAE Unit of Assessment fields will be automatically populated in future. No manual data entry is required.*

Press Save [icon] , then click the back button.

5d   Changing the INPREP Status to SUBMIT.

1   Enter the submission date

2   Select SUBMIT from the Current Status list then click OK

3   When all the data has been entered, press save.

NB If you have not input any of the above information that is mandatory for a proposal, you should receive an on screen error message alerting you to what is missing.

6 Changing a proposal to NOTSUBMIT

A record previously in preparation (INPREP) that a School has decided not to submit externally for funding, should be recorded as NOTSUBMIT.

Click in 'Current Status' and select NOTSUBMIT, then OK.

7a   Inputting mandatory basic details for Awarded projects

1. **Project Manager** - The project manager is the person who is responsible for the Financial Management of the project. They will be given full access to the project within Oracle Financials projects. You can search for the correct person in each School by completing a wildcard search e.g. Type in %Field% and click [icon] this will bring back a list of staff with Field in their name.
2. **Award Date** - The Award Date should be the date on the award letter received from the Funder.
3. **Actual/Expected Start Date** -This should be the actual/anticipated start date of the award. Any future change to this date should be made in Oracle Financials.
4. **Expected End Date** – This should be the actual/anticipated end date of the award. Any future change to this date should be made in Oracle Financials.
5. **The Indexer – Research Contracts Officer.** This field should be completed if a Research Contracts Officer in the Funding Services Team has negotiated the Terms and Conditions of the Award.
6. **Research Accounts Officer.** This is normally the Post Award administrator or Finance Officer responsible for the project
7. Click on the 'Funder' button and then on the 'Cost Headings' button against the Funder you want to add budget details to.

7b   Inputting Awarded Budget Details

1. On the Main Screen click on the 'Funder' button and then on the 'Cost Headings' button against the Funder you want to add budget details to.

Group	Description	UoM Bid fEC	Funder Bid Revenue	UoM Award fEC	Oracle Award Budget	Funder Award Revenue	Comments
A0101	Staff academic	0.00	0.00	0.00	0.00	0.00	
A05	Travel and subsistence	1,030.00	800.00	1,030.00	1,010.00	808.00	Travel at £1000
A06	Equipment	0.00	0.00	0.00	0.00	0.00	
A07	Consumables	515.00	400.00	515.00	505.00	404.00	Consumables of £500
A10	DA Estates costs	13,661.00	10,610.00	13,661.00	13,395.00	10,716.00	Lasb (£13,263)
A12	DA Staff costs	29,852.00	23,186.00	29,852.00	29,272.00	23,418.00	Grade 6, pt 1 (£28,98
A14	DA Indirect costs	40,254.00	31,266.00	40,254.00	39,743.00	31,578.00	(£39,082)
		85,312.00	66,262.00	85,312.00	83,925.00	66,924.00	Totals
A15	School contribution for fEC	-19,050.00		-18,388.00	-17,001.00		
		66,262.00	66,262.00	66,924.00	66,924.00	66,924.00	Balance

Application Cost Headings for EPSRC / Engineering & Physical Sciences Research C

2. On the Funder Cost Headings screen there are three columns for the Awarded budget that you must complete. The full FEC cost (UoM Award fEC), the budget to interface into Oracle Financials (Oracle Award Budget) and the funders contribution (Funder Award Revenue). You should exclude any part of the budget that we will be subcontracting out. Any details of a subcontract should be recorded in the External Participants page.

3. A default list of cost headings automatically appears for completion. If another cost heading is required, click an empty field in the Group column and use the tool to list all available cost headings in use. You should exclude any part of the budget that we will be subcontracting out. Any details of a subcontract should be recorded in the External Participants page.

4. The School contribution for fEC line is a self calculating figure and will be the difference between the Awarded Revenue column and the Awarded fEC Total column.

When all the data has been entered, press save. and then 'back' to the main screen.

7c   Changing the SUBMIT status to AWARD

1   Select AWARD from the Current Status list, then click OK
2   Press save.
3   You will receive a warning message that some items will become frozen

Changing the status will automatically trigger an interface that will run to create an Oracle Financials finance code. Details of the finance code can be found on the front screen 'Oracle Finance code'.

Once the project record has been updated to 'Award', details should not be amended in the RMS. All amendments including changes to budgets and dates should be made in the Oracle Financials. Any amendments should also be recorded in the amendments screen in the Funders page of the RMS (see section 9).

NB. If you have not input any of the above mandatory information for an Award, you will receive an on screen error message alerting you to what is missing.

8   Changing the SUBMIT status to REJECT

NB. It is very important to update the current status of proposals as this will give more meaningful success rates in the OPR reports.

9   Inputting Amendments

Any amendments added to this screen will **not** be transferred into Oracle Financials and still needs to be input directly into Oracle Financials.

PLEASE NOTE: Only amendments made to projects from 1ˢᵗ August 2008 should be entered in this new screen

Examples for each type of amendment are given below (values for illustration only!)
1. Budget Amendment (Common) – additional funding is being received for additional work within the current project time frame = input additional revenue and fEC values.
2. Budget Amendment (Rare) – non-fEC project (e.g. equipment only grant) which has received additional funding but there is not change to the project time frame = input revenue, no fEC value.
3. Income Extension (reworded – was COST Extension) – additional funding is being received for extra work and an extension to project timeframe = input revenue and fEC values.
4. No Income Extension (reworded – was NO COST Extension) – project timeframe is being extended e.g. to write up final report = no revenue but there may be a fEC value attributable to the extra time of the PI to write up the report or complete other outstanding project work. Consult fEC policy for guidance.
5. Other – change in project details e.g. change of funder name, change in investigator details, etc.

10   External Participants

Where there is an External Participant you will need to complete the External Participant screen.

Definition: An External Participant is any organisation involved in the Project, irrespective of whether we are making payments to them or not.

Please select as appropriate:

1. Type – this can be:
    - Co-applicant – where another organisation is a signatory to the contract/grant with the principal funder, e.g. a joint proposal to ESRC from University of Manchester and University of Liverpool, the University of Liverpool should be recorded as a co-applicant.
    - Collaborator – where the project is engaging with another organisation or individual but no money is changing hands between the parties, e.g. a local authority is helping identify research participants, but there is no value ascribed to this assistance or payment being made.
    - Contractor – where the University of Manchester is being paid to undertake work for another organisation, e.g. CRUK award a sole project to the University of Liverpool, and they sub-contract part of the work to the University of Manchester.
    - EC Co-ordinator – where the University of Manchester is not the co-ordinator on an EU award, this is where the co-ordinating organisation details should be recorded.
    - EC Partner – all partners on an EU award.
    - Support-in-kind – where a collaborating organisation/individual is providing in-kind support that has an agreed monetary value ascribed to it, e.g. AstraZeneca providing access to lab and human resource to £x value.
    - Sub Contractor – where we are paying another organisation from an award we have received and where there is no contract between the principal funder and the subcontractor, e.g. CRUK Award to the University of Manchester, we then pay Liverpool to deliver part of the Research project
    -

2. Participant – search for the External Participant by clicking in the participant cell & clicking [---] . Enter the participants name in the 'Find' search bar. Click OK when you have selected the participant you want.

3. Address – this is automatically populated by using the address set against the Account selected.   Contact details can be added manually.
4. SME – Enter Y if the participant is a Small to Medium Enterprise. Enter N if not. This information is crucial for the HEBCIS survey.
5. Northwest Based- Enter Y if participant is based in NW England. Enter N if not. This information is crucial for the HEBCIS survey.
6. Contract – Any contractual details will be input here by the Research Funding Services Team in the University Research Office.
7. Cost Headings - Any budget details will be input here by the Research Funding Services Team in the University Research Office.
8. Amendments – amendments to External Participants to be added here by the Research Funding Services Team in the University Research Office.

Further guidance on how to record other organisation on the RMS is available in **Appendices 3**

NB. The information recorded in the External Participants screen is used for the HEBCIS survey (Higher Education Business and Community Interaction Survey, a statutory return issued by HEFCE).

11   Application Appointment Approvals

This screen is used to record details of advertised posts and details of the appointed person once in post

1   Point – Enter the Salary spine point of the appointment
2   % on Grant – Enter percentage of time to be allocated to project. E.g. full time RA = 100%   paid from grant
3   Start Date – Enter start Date of appointment
4   End Date - Enter end Date of appointment
5   Sponsor – If there are multiple Funders on the project, the funder of the individual appointment should be selected.
6   Form No – If applicable, enter appointment approval form number.
7   Notes can be entered as desired.
8   Once a person has been apponted, their person code can be found and their personal details will be fed into the form. To retrieve their number, click in the person code field and the search box shown below will appear. Use % as a wildcard in the Find field and then click find to retrieve the person you require.

9   A student can be retrieved by selecting the tick box and then searching for the student as you would for staff.

12   Governance Approvals.

The Governance Approvals part of the RMS consists of 5 pages of data that records mandatory information for clinical trials and research requiring ethical approval. Further information on requirements can be found at:

http://www.campus.manchester.ac.uk/researchoffice/governance/

13   EC Audit.

The information on this screen will be input by the EU Funding Team within Research Funding Services Team in the University Research Office.

For further information or assistance relating to the RMS please contact the Research Operations Team via email at researchoperations@manchester.ac.uk.

Appendix 1

RMS Applications Types

Research		DEFINITION		
IFR	Internally Funded Research	Research funded by School/Faculty/University	Does not interface into Oracle Financials	
R ETP	Training Award/Package	Research funded via a designated training initiative e.g. research studentship	eg. Research Studentship	
RPG*	Research Project Grant	Research funded by a non-Research Council funder e.g. Royal Society, Wellcome Trust	eg. Royal Society, British Academy, Wellcome Trust	*Most commonly used
RCG*	Research Council Grant	Research funded by a Research Council	EPSRC, PPARC, MRC, ESRC, AHRC, NERC, BBSRC	*Most commonly used
R AMD	Amendment to Contract	CENTRAL RESEARCH OFFICE USE ONLY	Only used by Central Research Office	
R KTP	Knowledge Transfer Partnership	CENTRAL RESEARCH OFFICE USE ONLY	Only used by Central Research Office	
RCA	Research Council Contract	CENTRAL RESEARCH OFFICE USE ONLY	Only used by Central Research Office	
RPA	Research Project Agreement	CENTRAL RESEARCH OFFICE USE ONLY	Only used by Central Research Office	
RPD	Research Project Donation	CENTRAL RESEARCH OFFICE USE ONLY	Only used by Central Research Office - A 'Donation' that requires a contract	
R OUP	Outline Proposal	Outline proposal submission of an intended research project		
XXD	Deleted Record	Deleted Record	Does not interface into Oracle Financials	

Non-Research

CASE NR	Case Award	Funding for a studentship designed to incorporate an element of industrially related training	Does not interface into Oracle Financials	Contract negotiated by RO
CTA NR	Collaborative Training Account	Funding to support institutions in establishing or enhancing specialist research training provision for doctoral students involving other institutions	Does not interface into Oracle Financials	Contract negotiated by RO
DTA NR	Doctoral Training Account	Doctoral Training Accounts (DTAs) are intended to assist universities to attract the best people into postgraduate research and training in the UK	Does not interface into Oracle Financials	Contract negotiated by RO
ERDF NR	ERDF	European Regional Development Fund - EU funding	Does not interface into Oracle Financials	
ESF NR	European Social Fund	European Social Fund - EU funding	Does not interface into Oracle Financials	
HEIF NR	Higher Education Innovative Fund	Funding from HEFCE, the Office of Science and Innovation (OSI) and the Department for Education and Skills (DfES) to support institutions to engage in a broad range of knowledge transfer activities with business, public sector and community partners, for direct or indirect economic benefit	Does not interface into Oracle Financials	
JISC NR	Joint Information Systems Committee	Funding to support a wide range of projects, services, developments and infrastructure. Most initiatives	Does not interface into Oracle Financials	

		originate from a successful response to a circular or tender, inviting organisations to bid for funding		
MCTS NR	Marie Curie Training Site	EU funding to give young researchers (up to age of 35) pursuing doctoral studies the opportunity to receive training within high-level groups in their specialised area of research	Does not interface into Oracle Financials	Contract negotiated by RO
MTP NR	Masters Training Packages	To support Masters course development, delivery, student fees and maintenance	Does not interface into Oracle Financials	Contract negotiated by RO
NFA NR	Non-Financial Agreement	An agreement with no financial implications	Does not interface into Oracle Financials	Contract negotiated by RO
NWDA NR	NWDA - Non Research	Funding by the North West Regional Development Agency for non-research work	Does not interface into Oracle Financials	
OEG NR	Other External Grant	Any non-research grant that does not fit into a specific type	Does not interface into Oracle Financials	
SVC NR	Service Rendered	Funding for non-Research Services Rendered	Does not interface into Oracle Financials	
VIP NR	Wellcome VIP	Wellcome Trust Value in People Award	Does not interface into Oracle Financials	
XXD	Deleted Record	Deleted Record	Does not interface into Oracle Financials	

Appendix 2

	Programme Schemes	Definition
1	Career Development Award	Funding to support post-doctoral students making the transition from post-doctoral researcher to independent investigator
2	Clinical Trials	Funding to support a clinical trial
3	Conference Grant	Funding to support an individuals attendance at a conference
4	Development Award	Funding to support any Research related 'Development' project, this could be person development or project development
5	DTI Technology Programme	**Funding to support the development and exploitation of resource efficient sustainable technologies from the DTI**
6	Equipment Grant	Support for the purchase of equipment only
7	e-Science Project	Research funding awarded specifically to fund e-Science projects
8	Fellowship	Funding to support a fellowship application by a University member of staff
9	Framework VII	European Commission funding programme for supporting and encouraging collaborative research training and development in the European Union
10	Innovation Awards Scheme	Funding to support innovation and enterprise
11	LINK Programme	A research programme jointly fundingresearch with industry to accelerate the commercial exploitation of Government funded pre-competitive research and to focus on advances
12	Marie Curie Individual Fellowship	European Commission funding to support an individual in the Marie Curie Programme
13	Marie Curie Host Award (Mono)	European Commission funding an application from the University of Manchester to support a project involving a number of individual Marie Curie Fellows
14	Marie Curie Host Award (Multi)	European Commission funding an application from a consortium of institutions/organisations to support a project involving individual Marie Curie Fellows
15	Network/Academic Collaboration	Funding to support academic networking to encourage collaborative research
16	New Investigator Award	Funding to support researcher who are now ready to become principal investigators
17	Non-clinical trial	Funding to support a non-clinical trial
18	Non Research	Funding to support non-research projects
19	Programme Grant	Funding to support the development and exploitation of resource efficient sustainable technologies
20	Pump-Priming Grant	Pump Priming Funds are to support research in areas considered to be of strategic importance to enable researchers to develop proposals with the aim of attracting further funding from external sources.

21	Research contract	Funding for research where the terms and conditions are negotiable
22	Research contract, incl Studentship	Research contract with funding to support a Studentship
23	Research Donation	Funding supplied to the University to support research activity with no special terms and conditions or outputs specified
24	Research Equipment Initiative (REI)	Funding support for the purchase of research equipment
25	Research Grant	Research grant funding from a UK non-Research Council, e.g. Cancer Research UK, Leverhulme, Wellcome Trust, etc.
26	Research Grant - Managed	Research grant funding from a specific call alligned to a specific call from a Research Council
27	Research Grant - Responsive	Research grant funding from a UK Research Council available via an open call with designated cut off dates throughout the year
28	Research Grant, incl Studentship	Research grant with funding to support a Studentship
29	Research Leave	Funding to release a member of staff to undertake research
30	Responsive Funding Scheme	Research grant funding available via an open call with no deadline for submission.
31	Rolling Grant	Funding for programmes with a renewable element, e.g. 1 year project with a view to renewal of funding
32	Salary Support	Funding to support the Salary of a specified Researcher
33	Short Term Visit	Funding to support a short-term visit for someone internally or Externally
34	Small Grant	Small grant research support/funding, limit se by the Funder, e.g.AHRC, NERC, Cancer Research UK, NIH, etc.
35	Travel Grant	Funding support towards travel costs
36	University Award	Funding support provided by the University of Manchester
37	Visiting Fellowship	Funding support for a visiting fellowship to the University of Manchester

Appendix 3

GUIDANCE ON HOW TO RECORD OTHER ORGANISATIONS ON THE RMS

Example 1

University of Manchester is the lead applicant on a project to funder X and University of Y is a co-applicant. Both applicants will be co-signatories to the grant.

→

RMS

Funder X = Funder/Debtor
(Funder page)

University Y = External participant co-applicant
(External Participant page)

→

Notes

Only record the University of Manchester's portion of the budget under the funder/debtor. The remainder of the budget (University Y's portion) is not recorded in the RMS.

Example 2

University of Y is lead applicant to funder X and University of Manchester is co-applicant.

→

RMS

Funder X = Funder
(Funder page)

University Y = Debtor
(Funder page)

→

Example 3

University of Manchester is an applicant to funder X and after funds are awarded University of Y undertakes some work on the project.

→

RMS

Funder X = Funder/Debtor
(Funder page)

University Y = External Participant Sub Contractor
(External Participant page)

→

Notes

Record the full amount of the budget under the funder/debtor. The budget to be subcontracted out to University Y should be recorded under their External Participant's entry.