

RMS System Release notes – October 2008

The Research Management System will be updated on 6th October 2008 to include new functionality for recording amendments to projects and an updated EC Audit Screen. These notes provide guidance notes for users who need to use the new functionality.

The following new additions now appear on the funder screen:

- 1 New project amendments screen button.
- 2 Funding Body Ref - enables users to record a Funders project reference (normally required in correspondence with the funder)
- 3 EC Role - A drop down list which is used to identify the role of any Debtors on the project e.g. Co-Ordinator, Assistant Contractor, Member etc.

Funders Screen

The screenshot shows the 'Application Funder' screen. It features a table with columns for 'Principal Party Number', 'Account', 'Type', 'EC Role', 'Funder/Debtor', 'Funding Body Ref', 'SME', 'NW B', 'Cost Headings', 'Address', 'Indicators', and 'Amendments'. The first row is populated with data: 'E49', 'A.I.C.R.', '265604', 'Association For Int Cancer Research', '11', 'UK Based Charities', 'Debtor', '1234567891011121', 'SME', 'N', 'N'. The 'Amendments' button is highlighted with a box labeled '1'. The 'Funding Body Ref' field is highlighted with a box labeled '2'. The 'EC Role' dropdown menu is highlighted with a box labeled '3'. A 'Back' button is at the bottom.

Funder - Amendments screen

All awarded projects since the 1st August 2008 that have had a budget amendment or project extension (either a grant or contract) should now have the details of this recorded in the Funder Page. Recording this data will ensure that additional awards or extensions to existing projects are included in Operational Performance Review (OPR) and other performance management reporting available.

NB: any amendments added into this screen will not be transferred into Oracle Financials any updates to budgets or end dates must also be done separately in Oracle.

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

Three types of amendments can be input:

Budget Amendment - No change in end date but additional

Cost Extension - End date extension and a change in budget

No cost extension - End date extension but no change to the budget

Click on the Amendments button in the Funder Screen (see below)

The screenshot shows the 'Application Sponsors' interface. At the top, there's a tab labeled 'Application Sponsors'. Below it, the 'Application Funder' section contains fields for 'Principal Party Number' (E49), 'Account' (265604), 'Type' (11), and 'EC Role'. The 'Association For Int Cancer Research' is listed as the funder. The 'Funder/Debtor' is set to 'Debtor' with a funding body reference of '1234567891011121'. On the right, there are buttons for 'Cost Headings', 'Address', 'Indicators', and 'Amendments'. The 'Amendments' button is circled in red.

The new Amendment Screen will appear.

The screenshot shows the 'Funders' Amendments screen. It has a table with columns: 'Type', 'Year', 'Date of Amendment', 'Revised/Extension Start Date', 'Revised/Extension End Date', 'Additional Revenue value', and 'Additional fEC value'. The first row has 'Type' as a dropdown menu, which is circled in red. Below the table, there are 'Amendment History' buttons for each row. At the bottom, there are 'Amendment Totals' and 'Project Totals' sections with summary values.

Click on the "Type" drop down list to begin to populate the record.

Any change to the end date or total revenue and FEC budgets should be entered here. NB only the additional budget should be entered **not** the total of the original and additional award.

This is a close-up of the 'Amendments' table. The 'Type' dropdown is set to 'NO_CE' (No Cost Extension). The 'Indexer' field contains '7080372' and 'Samuel Bibby'. The 'Date of Amendment' is '08-MAY-2008', 'Revised/Extension Start Date' is '01-MAY-2008', and 'Revised/Extension End Date' is '30-JUN-2008'. The 'Additional Revenue value' and 'Additional fEC value' are both '0.00'. Red circles highlight the 'Type', 'Indexer', and the date fields.

You can assign an "indexer" (the person who has authorised the change to the project) by clicking in the indexer box and searing by name.

The amendment history button shows which user made the amendment.

When amendments are recorded against a funder, the screen automatically calculates the totals for the project.

Amendments		Type	Year	Date of Amendment	Revised/Extension Start Date	Revised/Extension End Date	Additional Revenue value	Additional FEC value	Amendment History	
Indexer	NO_CE	No Cost Extension		08-MAY-2008	01-MAY-2008	30-JUN-2008	0.00	0.00	Amendment History	
7080372	Samuel Bibby	Description								
Indexer	AMEND	Budget Amendment		07-JUN-2008			5,000.00	15,000.00	Amendment History	
5377103	Sabina Hawthornthwaite	Description								
Indexer	CE	Cost Extension		09-JUL-2008	01-JUL-2008	31-JUL-2008	2,000.00	6,000.00	Amendment History	
		Description								
Indexer									Amendment History	
		Description								
Indexer									Amendment History	
		Description								
Totals							7,000.00	21,000.00		
Total Project Value							29,626.00	Project Awarded FEC Total		45,105.00
Total Funder Award Value							8,600.00	Funder Awarded FEC Total		23,000.00
Back										

Total of the additional Awarded Revenue and FEC for this Funder on this project e.g. total of everything on this screen.

Total of all Awarded Revenue and FEC values for all Funders on this project e.g where a project is jointly funded these boxes automatically calculate the new total award figure for the entire project.

Total of all Awarded Revenue and FEC values for this Funder on this project e.g. original award plus all budget amendments for this Funder only.

External Participants

It is also now possible to add an amendment to an external participant record on a project record. An External Participant is any organization involved in the Project, irrespective of whether we are making payments to them or not e.g. a co-applicant, support in-kind, sub-contractor etc.

Under normal circumstances the Contracts Team in University Research Office will be responsible for recording any amendments to external participant records as part of the Contract / Collaboration agreement amendment process.

Where a contract is not required e.g. where a Research Council Grant lists a co-applicant in the external participants screen the following process applies.

Open the external participant and click on the amendment button.

The screenshot shows the 'External Partners' window. At the top, there's a header 'External Partners'. Below it, a table lists participants. The first row is for 'AstraZeneca plc' with 'Type' 'Co-Applicant' and 'Budget Total' '0.00'. The 'Amendments' button is circled in red. Other buttons like 'Cost Headings', 'Address', 'Contract', and 'Status History' are also visible. A 'Back' button is at the bottom.

The amendment screen can then be updated in the same way as the Funder Amendment screen.

The screenshot shows the 'Amendments' window. It has a table with columns: Type, Year, Date of Amendment, Revised/Extension Start Date, Revised/Extension End Date, Additional Revenue value, and Additional REC value. The first row has '0.00' in the last two columns. There's an 'Amendment History' button next to each row. At the bottom, there's a 'Back' button.

EC Audit Page

If an EC Acronym is recorded in the Funder Screen (see below).

The screenshot shows the 'Funder Screen' with the following details:

Account	E1359	Aerodyne Research	SME	N
Type	89	Aerdyne Research Inc	NWB	N
EC Role	AC	Assistant Contractor	Funder/Debtor	Debtor
			Funding Body Ref	

Buttons at the bottom: Cost Headings, Address, Indicators, Amendments.

The RMS will automatically populate the EC Audit Screen using the Debtor recorded in the Funders page.

The screenshot shows the 'EC Audit Screen' with the following details:

EC Acronym:

WEB Address:

Funder/Debtor:

Address1:

Address2:

Address3:

City: Country: Post Code:

Audit Dates:

Audit Due Date	Audit Arranged Date	Arranged	Arranged By
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Buttons: Associate Debtor, Back.

If there is more than one Debtor on a record then you must manually choose which debtor to attach to the EC Audit Page by clicking on the Associate Debtor button.

Select the debtor to be assigned to the EC Audit page and click the "back" button.

The screenshot shows the 'Funder Debtors List' with the following details:

Select Party Number	Account	Funder/Debtor
<input checked="" type="checkbox"/> E1359	259404	Aerdyne Research Inc
<input checked="" type="checkbox"/> E4255	259406	Bausch & Lomb
<input type="checkbox"/>		
<input type="checkbox"/>		

Buttons: Back.

For further advise and guidance on using the RMS a full user guide is available at

<http://www.campus.manchester.ac.uk/researchoffice/guides/>

alternatively please email any queries to the Research Operations Team on edsmail@manchester.ac.uk