

RMS System
Upgrade 2, April 2007

A new version of the RMS is scheduled to be released on Tuesday 17th April 2007. This document is to highlight the major changes. An updated full RMS User Guide can also be found at <http://www.campus.manchester.ac.uk/researchoffice/preparing/rms/> on or after 17th April 2007.

Any issues or errors occurring during this system release should be emailed to edsmail@manchester.ac.uk

Any suggestions for future developments should be emailed to edsmail@manchester.ac.uk

The key features of the release are:

1. RMS Wizard

This is an optional quick entry screen to initiate an 'INPREP' RMS record without having to work through the several mandatory screens required when inputting a proposal.

2. Funder Cost Headings

- 2.1 The button for Funder Cost Headings will be deleted from the main screen as this detail is held within the Funders screen.
- 2.2 The School Contribution for fEC will be self calculating.

3. Investigators Credit splits

The system now has the ability to record multiple credit splits against one investigator's record. For example, Dr Unknown to be split 50% School of Medicine and 50% Life Sciences can now be recorded as one Investigator.

4. Upgrade and update the existing Division and Group fields

- 4.1 The legacy RGSU RGroup and RGSU Division fields have been renamed Research Group and Research Division respectively. Any Group or Division detail entered against the School field on the RMS has been mapped to the correct field.

For example, if Politics (I4186) was entered in the School field, the School field will be amended to state School of Social Sciences (I3041) and Politics has been moved to the Research Division field.

- 4.2** Any legacy data entered in RGSU RGroup and RGSU Division fields has been mapped to the new equivalent Group or Division

For example,

Old	New
RGSU Division - 1, Clinical Division 1	Research Division - Division of Medicine & Neuroscience (I4031)
RGSU RGroup - B, Dermatology	Research Group- Dermatology (I5126)

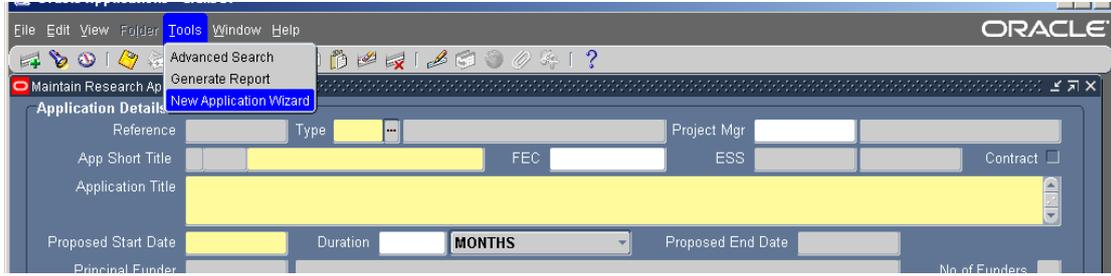
- 4.3** Research Institutes can now be entered against a research project on the RMS.

5. Minor changes and bug fixes

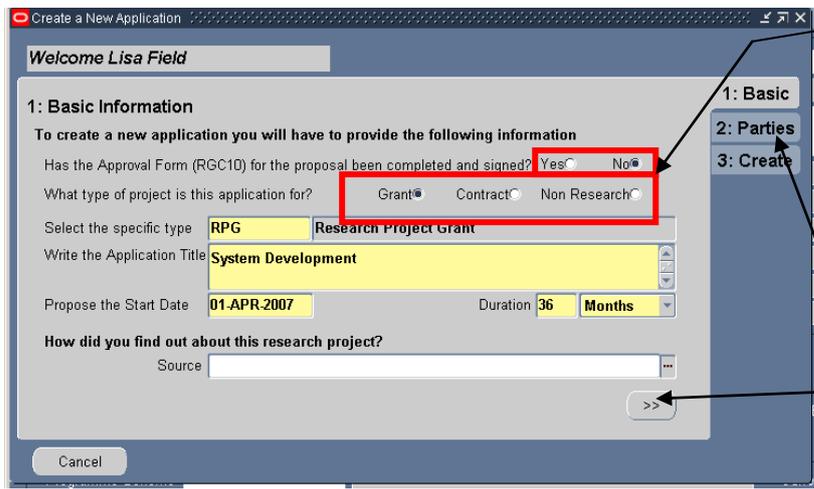
- 5.1** Spelling corrections
- 5.2** External Participants being assigned to Party Numbers.
- 5.3** Addition of Finance Information button - currently inactive
- 5.4** Speedier transfer of Information between RMS and Oracle Financials

1. RMS Wizard.

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

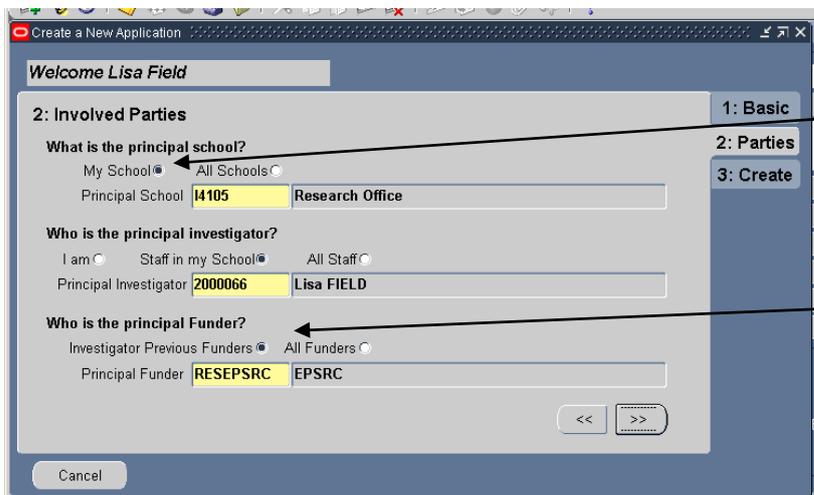


All mandatory information required to save a basic 'In prep' record is highlighted in yellow as it does in the main RMS. The record automatically defaults to a Research Grant without an approval form.



Defaults to a Research Grant without an approval form

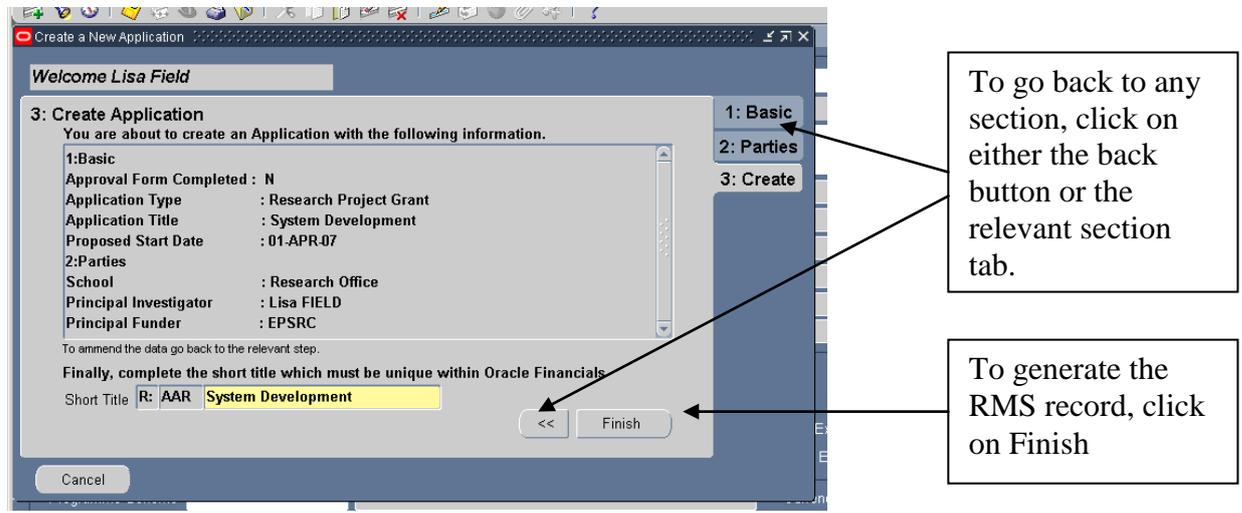
To continue to the next page, click on either the next button or the next section tab.



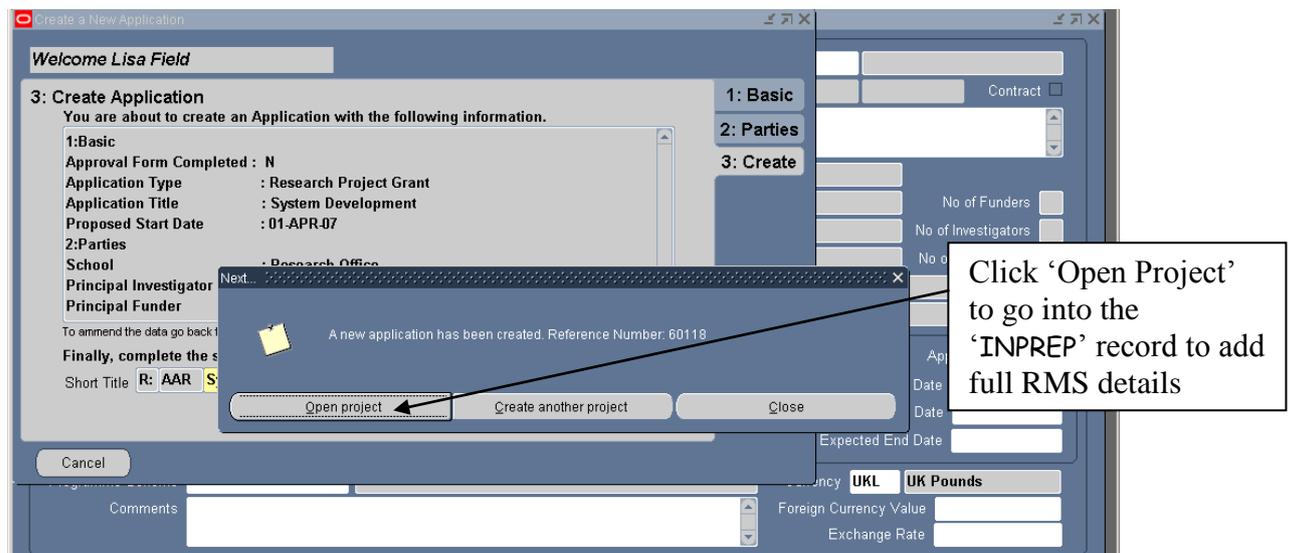
Your school will be the automatic default for the Principal School

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

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

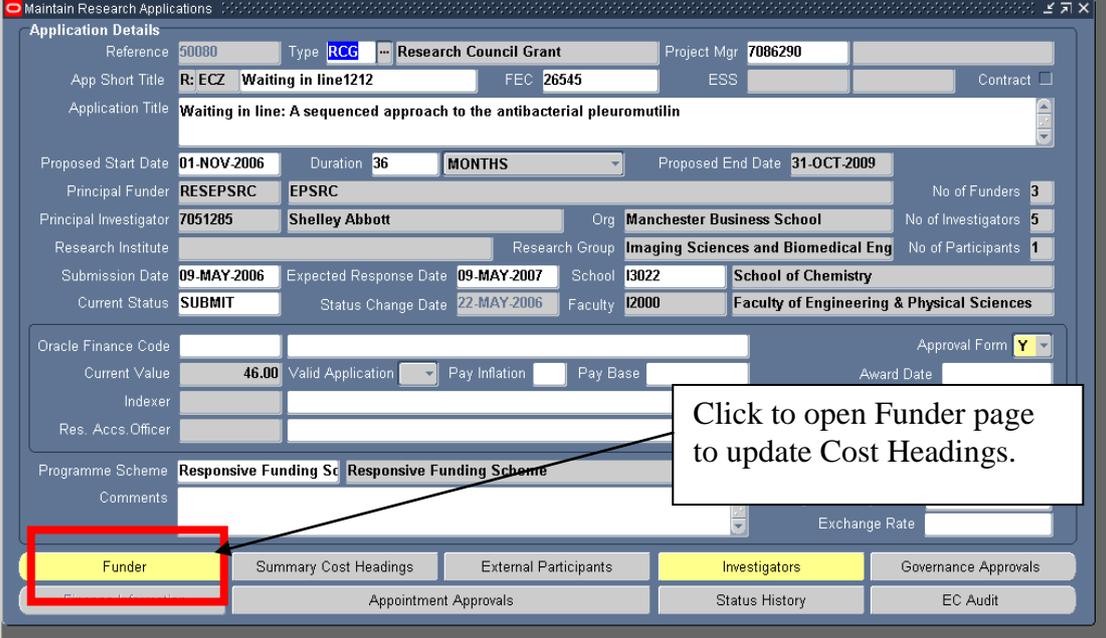


After creating your RMS record you can go directly to the record to complete the information, or create another basic record, or Close the RMS Wizard. The record created will have an 'INPREP' status.



2.1 Amendment to Funder Page

Updating Funder Cost Headings can now only be done through the Funder screen. A summary of the cost heading can still be seen from the Main page.



Maintain Research Applications

Application Details

Reference: 50080 Type: RCG Research Council Grant Project Mgr: 7086290

App Short Title: R: ECZ Waiting in line1212 FEC: 26545 ESS Contract

Application Title: Waiting in line: A sequenced approach to the antibacterial pleuromutilin

Proposed Start Date: 01-NOV-2006 Duration: 36 MONTHS Proposed End Date: 31-OCT-2009

Principal Funder: RESEPSRC EPSRC No of Funders: 3

Principal Investigator: 7051285 Shelley Abbott Org: Manchester Business School No of Investigators: 5

Research Institute: Research Group: Imaging Sciences and Biomedical Eng No of Participants: 1

Submission Date: 09-MAY-2006 Expected Response Date: 09-MAY-2007 School: I3022 School of Chemistry

Current Status: SUBMIT Status Change Date: 22-MAY-2006 Faculty: I2000 Faculty of Engineering & Physical Sciences

Oracle Finance Code: Current Value: 46.00 Valid Application: Pay Inflation: Pay Base: Approval Form: Y

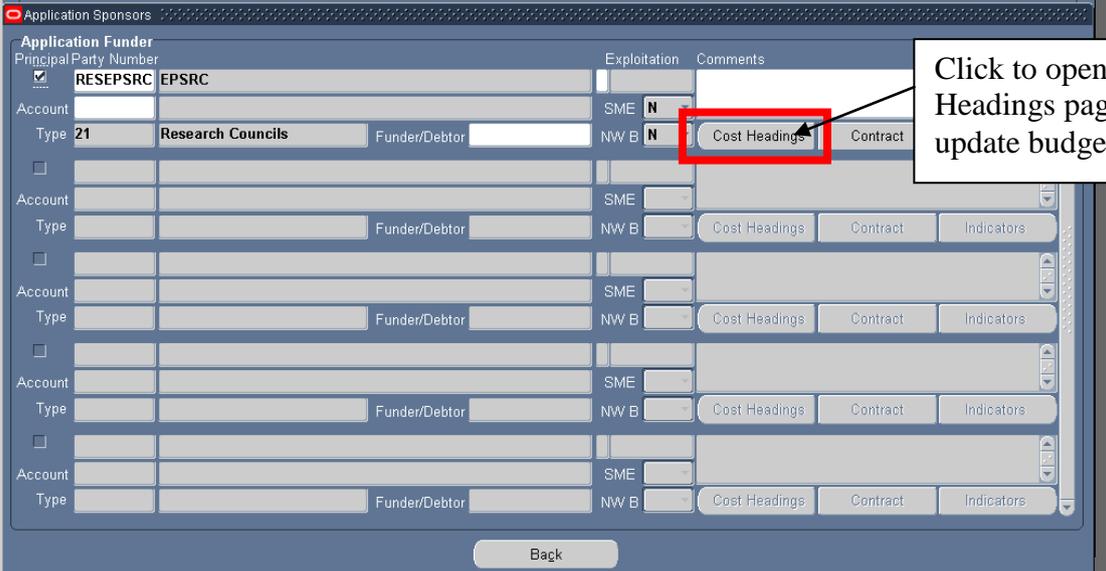
Indexer: Res. Accs. Officer: Programme Scheme: Responsive Funding Scheme Responsive Funding Scheme

Comments: Exchange Rate:

Funder Summary Cost Headings External Participants **Investigators** Governance Approvals

Appointment Approvals Status History EC Audit

Click to open Funder page to update Cost Headings.



Application Sponsors

Application Funder

Principal Party Number	Exploitation	Comments
<input checked="" type="checkbox"/> RESEPSRC EPSRC	SME N	
Account: Type: 21 Research Councils Funder/Debtor	NW B N	Cost Headings Contract
<input type="checkbox"/>	SME	
Account: Type: Funder/Debtor	NW B	Cost Headings Contract Indicators
<input type="checkbox"/>	SME	
Account: Type: Funder/Debtor	NW B	Cost Headings Contract Indicators
<input type="checkbox"/>	SME	
Account: Type: Funder/Debtor	NW B	Cost Headings Contract Indicators
<input type="checkbox"/>	SME	
Account: Type: Funder/Debtor	NW B	Cost Headings Contract Indicators

Back

Click to open Cost Headings page to update budgets.

2.2 Amendment to Funder Cost Headings Page

The School's Internal Contribution for fEC is now separate from the list of cost headings to make the page easier to read. The Internal Contribution for fEC is now a self calculating figure at both the Proposal and Award stages.

The screenshot shows the 'Funder Cost Headings' page for 'EPSRC / Engineering & Physical Sciences Research C'. The table lists various cost items with columns for 'Group', 'Description', 'BID fEC Total', 'BID Revenue', 'Awarded fEC Total', and 'Awarded Revenue'. A red box highlights the 'Total' row and the 'A15 Internal contribution for fEC' row. A callout box points to the '0.00' value in the 'Awarded fEC Total' column for A15, stating: 'This contribution is automatically calculated by looking at the difference between the Revenue amount and the fEC total amount.'

Group	Description	BID fEC Total	BID Revenue	Awarded fEC Total	Awarded Revenue	Comments
A02	Student Maintenance	36,900.00	36,900.00	0.00	0.00	
A03	Student Fees	9,255.00	9,255.00	0.00	0.00	
A05	Travel and subsistence	4,000.00	3,200.00	0.00	0.00	
A06	Equipment	13,771.00	11,017.00	0.00	0.00	
A07	Consumables	19,869.00	15,895.00	0.00	0.00	
A10	DA Estates Costs	15,932.00	12,746.00	0.00	0.00	
A11	DA Equipment	0.00	0.00	0.00	0.00	
A12	DA Staff costs	74,019.00	59,215.00	0.00	0.00	
A13	Exceptional Items	0.00	0.00	0.00	0.00	
A14	DA Indirect costs	37,874.00	30,299.00	0.00	0.00	
Total		211,620.00	178,527.00	0.00	0.00	
A15	Internal contribution for fEC	-33,093.00		0.00		
Balance		178,527.00	178,527.00	0.00	0.00	

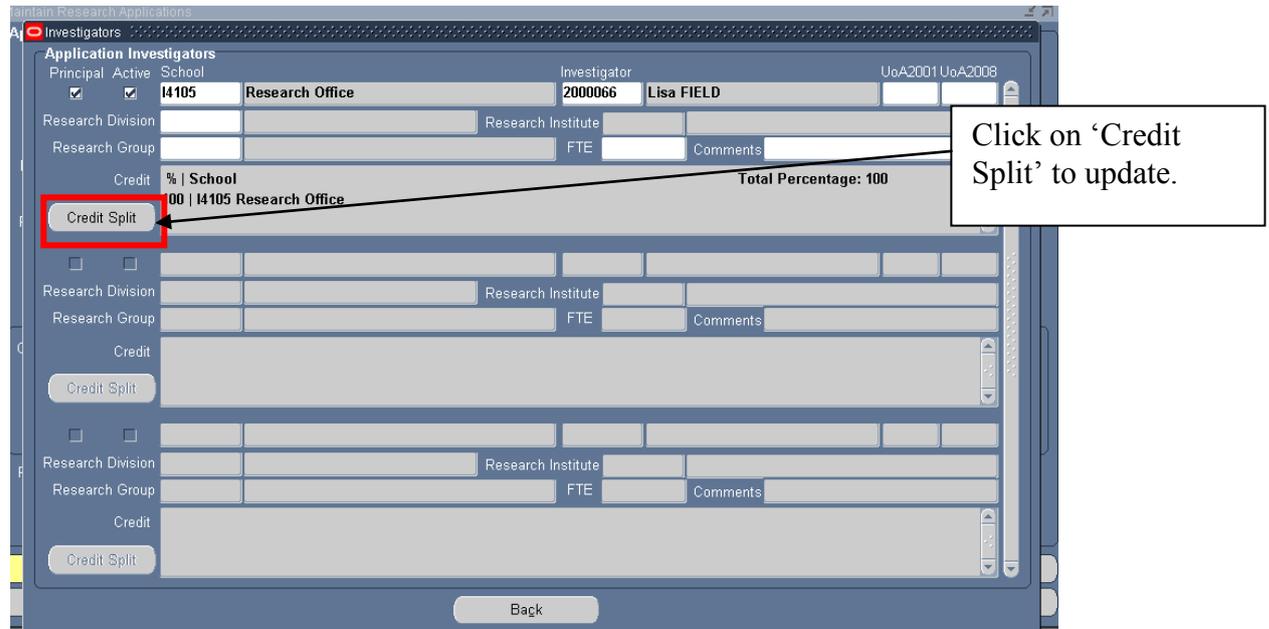
For all existing RMS records, if the automatically calculated Internal Contribution amount differs to the amount previously entered on to the RMS record you will be given the option to replace the original values with the automatically calculated value. The system will ask this question every time you enter the Funder Cost Heading Screen from the Funder page. To avoid this you can view the budget from the 'Summary Cost Headings' on the front screen.

The screenshot shows a table with numerical values. A dialog box titled 'Differences Found' is overlaid on the table. The dialog box contains a warning icon and the text: 'Internal Contribution for fEC differs from automatically calculated contribution'. Below the text are two buttons: 'Replace' and 'Ask me later'.

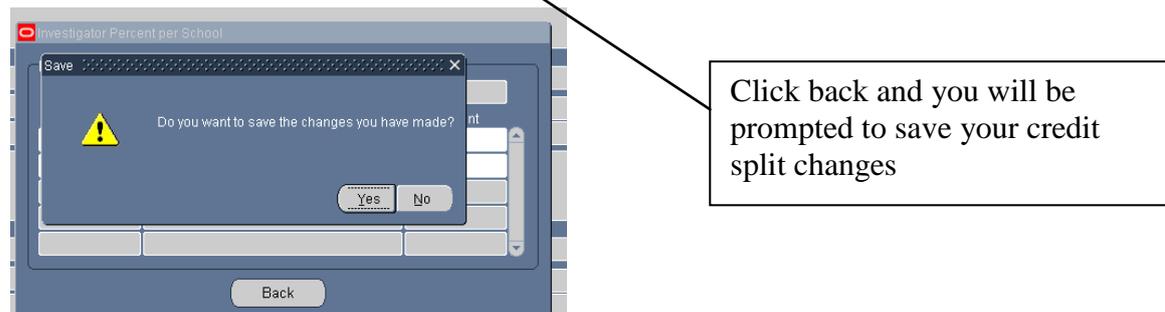
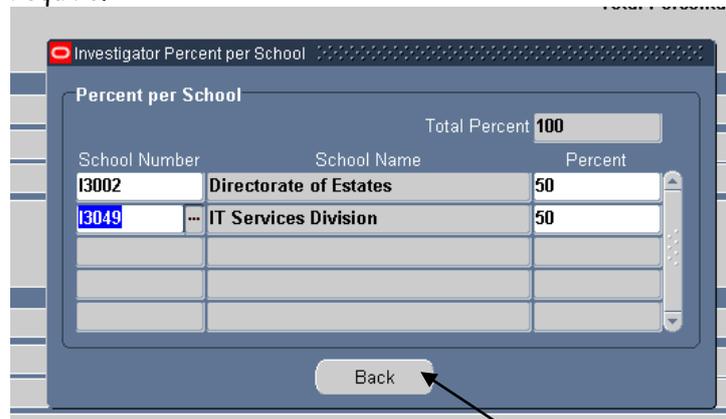
100.00	0.00	100.00	0.00
100.00	0.00	100.00	0.00
410.00	10.00	310.00	10.00
-300.00		-300.00	

3. Investigator Credit Splits

There are occasions when an Investigator is split between two Schools and therefore their credit split for RAE purposes should also be split. In the old system, users would have to enter the person in twice against the relevant Schools which would in turn skew the total number of Investigators for a project. Now the person will be recorded once and their credit split recorded against each relevant School.



Within the Credit Split screen enter the percentages against as many Schools as you require.



After saving the changes the new credit splits will be shown in the Investigators screen.

The screenshot shows the 'Application Investigators' interface. At the top, it displays 'Principal' (checked), 'Active' (checked), 'School' (I4105), and 'Research Office'. The 'Investigator' field shows '2000066' and 'Lisa FIELD'. Below this, there are fields for 'Research Division', 'Research Institute', 'Research Group', 'FTE', and 'Comments'. A 'Credit' section shows a table with columns for '% | School' and 'Total Percentage: 100'. The table contains two rows: '50 | I4105 Research Office' and '50 | I3049 IT Services Division'. There are also 'Credit Split' buttons for each row. The interface is blue-themed and includes a 'Back' button at the bottom.

4. Upgrade and update the Research Division and Group fields

The previous RGSU RGroup and RGSU Division have been replaced with Research Division and Research Group. The ability to record a project against a Research Institute is also now available. Any Divisional or Group data entered on the RMS in the School field has also been corrected and moved to the correct field. Please note that the Division or Group can be identified by it's code. Divisions are level 4 eg. Politics I4186, Groups are level 5 eg. Dermatology I5126

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Research Division' and 'Research Group' input fields. The rest of the interface, including the credit split table and the 'Back' button, remains the same.

4.1 Any data recorded in incorrect field have now been mapped to the correct field. Structured as Faculty (level2), School (level 3), Division (level 4), Group (level 5) For example, if Politics (I4186) was entered in the School field, the School field will be amended to state School of Social Sciences (I3041) and Politics has been moved to the Research Division field.

4.2 Any legacy data entered in RGSU RGroup and RGSU Division fields has been mapped to the new equivalent Group or Division

An example is shown below

Old RGSU Division	Old RGSU RGroup	New Research Division	New code Level 4	New Research Group	New code Level 5
1	B	Med &	I4031	Dermatology	I5126
1	V	Neuroscience		Neurosciences	I5128
1	A			GI Sciences	I5127

4.3 Research Institutes (level 3) can now be selected against an Investigator.

A complete list of all Research Divisions and Research Groups is available in the RMS user guide which can be found at

<http://www.campus.manchester.ac.uk/researchoffice/preparing/rms/> on or after 17th April 2007

5. Minor changes and Bug Fixes

5.1 Various spelling errors have been in the RMS system have been identified and corrected. However, please report any further cases to edsmail@manchester.ac.uk

5.2 All organisations that the University of Manchester has a relationship with require an internal reference known as a Party Number so that we can report on the External Participants completely. The majority of External Participants recorded on the RMS have now been assigned a Party Number. There are some records though that will require you to assign the Party Number, for these records the RMS will take you to the External Participants page for the Party Number to be searched for and entered. If you cannot find the Party Number you will need to email edsmail@manchester.ac.uk with the organisation's full details including address.

5.3 A new button has been added for 'Finance Information'. This button is currently greyed out and inactive. It is intended that some relevant information from Oracle Financials Projects will be viewable here in the future.

Application Details

Reference: 50080 Type: **RCC** Research Council Grant Project Mgr: 7086290

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Indexer: Actual/Expected Start Date: Expected End Date:

Res. Accs. Officer: Expected End Date:

Programme Scheme: Responsive Funding Scheme Responsive Funding Scheme Currency: UKL UK Pounds

Comments: Foreign Currency Value: Exchange Rate:

Navigation Buttons: Funder, Summary Cost Headings, External Participants, Investigators, Governance Approvals, **Finance Information**, Appointment Approvals, Status History, EC Audit

5.4 The transfer of information between the RMS and Oracle Financials projects has been speeded up. If you do not see your Oracle Financials project code in the RMS within 24 hours please contact edsmail@manchester.ac.uk