

RMS System

Upgrade 1, 30th October 2006

A new version of the RMS is scheduled to be released on Monday 30th October 2006.

The key features of the release are:

1. Advanced Search Facility - Upgraded capability with additional search fields and expanded summary information for each record.
2. Mandatory Items - The system will require certain key fields to be completed before moving forward through each status flow (INPREP - SUBMIT - AWARD etc.)
3. Research Application Summary - New capability to enable users to print or save a summary of the record as a PDF file.
4. Protected Fields after 'AWARD' - Certain fields will no longer be amendable after project status has been changed to AWARD.
5. Amendments to Sponsor Pages - Sponsor pages renamed Funder Pages with additional information included.
6. Minor changes and Bug Fixes - Short Names for non-research projects, error messages and spelling corrections.

1. Advanced Search Facility Upgrade

The following changes have been made to the Advanced Search Facility:

- Principal Investigator search field has been changed to Investigator. Users will be able to search on all investigators not just PIs. The ability to search on PI only will be retained through a PI only tick box.

NB: Co-Investigators can only be identified through the Investigator search. Other search fields such as "Sponsor" or "Awards Date" etc. will only bring back one project listing with the PI named.

- The following items have been added as Search criteria:
 - Awarded date between...
 - Oracle Finance code
 - Contract Officer
 - Sponsor Reference (Funding Body Reference from sponsor - contracts page)
- The following items have been added to the Search results:
 - Principal/Co-Investigator flag added
 - Sponsor Name
 - Principal Sponsor flag added
 - Project Manager
 - Submission Date
 - Award Date
 - Application Type
 - Oracle Finance Code
 - Contracts Officer
 - Sponsor Reference

An example of the new Advanced Search screen is shown below:

- The inclusion of XXD Deleted Records in search results has been removed. Any record with an XXD type will not show up in the advanced search results. These records can still be viewed using the quick F11 search function.

A user guide for the advanced search function is attached to this document and further copies are available via email from edsmail@manchester.ac.uk

Mandatory Items

The following items within in the RMS have been made mandatory to reduce the number of interface failures between the RMS and Oracle Financials due to incomplete data input.

Procedure / Status

Mandatory Input Item

<i>To create a Grant application (INPREP Status)</i>	Application Short Title Application Title Proposed Start Date RGC10 Project Type
<i>To change an application to SUBMIT</i>	Duration Submission Date School Programme Scheme Sponsor Details <ul style="list-style-type: none"> ○ Party Number ○ Account ○ Principal flag

	<ul style="list-style-type: none"> ○ Funder/Debtor Investigator Details <ul style="list-style-type: none"> ○ School ○ Investigator ○ Principal flag ○ Credit % - must total 100% ○ FTE Sponsor Cost Headings <ul style="list-style-type: none"> ○ Bid fEC Total ○ Bid Revenue
<i>To change an application to AWARD</i>	Project Manager Award Date Start Date End Date Programme Scheme to be checked on migrated records <50000 Sponsor Cost Headings <ul style="list-style-type: none"> ○ Awarded Full Economic Cost ○ Awarded/Revenue Value

Research Applications Summary

Users can now print a summary of the detail for any individual record on the RMS through the Tools-Application function. A user separate user guide on how to do this is attached to this document. Further copies are available via email from edsmail@manchester.ac.uk

Protected Fields after 'AWARD'

The following items will be read only after the record has been made an award. This is because most of these details are to be transferred into Oracle Financials and therefore the amendments should be made in Oracle Financials.

Application Short Title

Application Title

Project Type

Submission Date

School

Programme Scheme

Sponsor Details

- Party Number
- Account
- Principal flag
- Funder/Debtor

Investigator Details

- School
- Investigator
- Principal flag
- FTE

Sponsor Cost Headings

- Bid fEC Total
- Bid Revenue

Sponsor Cost Headings

- Awarded Full Economic Cost
- Awarded/Revenue Value

Project Manager

Award Date

Start Date

Programme Scheme

Amendment to Sponsor Page

The 'Sponsor' page and the 'Sponsor Cost Headings' page have been amended to read 'Funder' and 'Funder Cost Headings'.

The layout has been altered to make it easier to read and text descriptions have been added to the HESA type and Account Name. The budget headings page remains unchanged. The following screen shots demonstrate the changes:

Sponsors Page - Original

New Sponsors Page- Now **Funder** Page

Sponsor Cost Headings Page Original

New Sponsor Cost Headings Page - Now **Funder Cost Headings**.

Budget Details page remains unchanged

Group	Description	BID - IEC Total	BID Revenue	Awarded Full Economic Cost Value	Awarded Revenue	Comments
A0102	Staff academic related	93411.00	74729.00	99801.00	79841.00	
A05	Travel and subsistence	4000.00	3200.00	4166.00	3333.00	
A07	Consumables	36000.00	28800.00	37497.00	29998.00	
A10	OA Estates Costs	52802.00	42242.00	54998.00	43998.00	
A12	OA Staff costs	44432.00	35545.00	46340.00	37072.00	
A14	OA Indirect costs	125524.00	100419.00	130744.00	104594.00	
A15	Internal contribution for IEC	0.00	71234.00	0.00	74710.00	
Totals		356169.00	356169.00	373546.00	373546.00	

Minor changes and Bug Fixes

Work has been undertaken to include error messages where mandatory items have not been input. Work has been undertaken to reduce the number of unidentifiable error messages received by users, however, users are still advised to log any error messages that they cannot understand with edsmail@manchester.ac.uk

Various spelling errors have been corrected, although there are still a small number outstanding which will be corrected in the next system release.

The Short Title field will automatically prefix all non-research projects with a P for easier identification.

A warning message will now appear in each sub page if any amendments have been made. This is to ensure you want to save them, if you haven't already done so, before going back into the Main Screen.

The Buttons for Funder, Funder Cost Headings and Investigators have been coloured yellow to remind users that these pages have mandatory items in them. The other buttons which are still coloured grey are for optional use.