

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. The first record is selected and highlighted. The fields are as follows:

Principal Party Number	Account	Type	Funder/Debtor	Funding Body Ref	SME	NW B	Cost Headings	Address	Indicators	Amendments
E49	265604	11	UK Based Charities	1234567891011121	N	N				

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. The 'Application Funder' section includes fields for Principal Party Number (E49), Account (265604), Type (11), and Funder/Debtor (Debtor). The 'Amendments' button is circled in red.

The new Amendment Screen will appear.

The screenshot shows the 'Amendments' screen. The 'Type' dropdown menu is circled in red. The screen displays a table with columns for Type, Year, Date of Amendment, Revised/Extension Start Date, Revised/Extension End Date, Additional Revenue value, and Additional fEC value. Below the table are 'Amendment Totals' and 'Project Totals' sections.

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 close-up shows the first row of the 'Amendments' table. The 'Type' dropdown is set to 'NO_CE' and the 'Indexer' field contains '7080372 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'.

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.

Type	Year	Date of Amendment	Revised/Extension Start Date	Revised/Extension End Date	Additional Revenue value	Additional FEC value	Amendment History	
NO_CE	No Cost Extension	08-MAY-2008	01-MAY-2008	30-JUN-2008	0.00	0.00	Amendment History	
Indexer	7080372	Samuel Bibby	Description					
AMEND	Budget Amendment	07-JUN-2008			5,000.00	15,000.00	Amendment History	
Indexer	5377103	Sabina Hawthornthwaite	Description					
CE	Cost Extension	09-JUL-2008	01-JUL-2008	31-JUL-2008	2,000.00	6,000.00	Amendment History	
Indexer			Description					
Indexer			Description					Amendment History
Indexer			Description					Amendment History
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	

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.

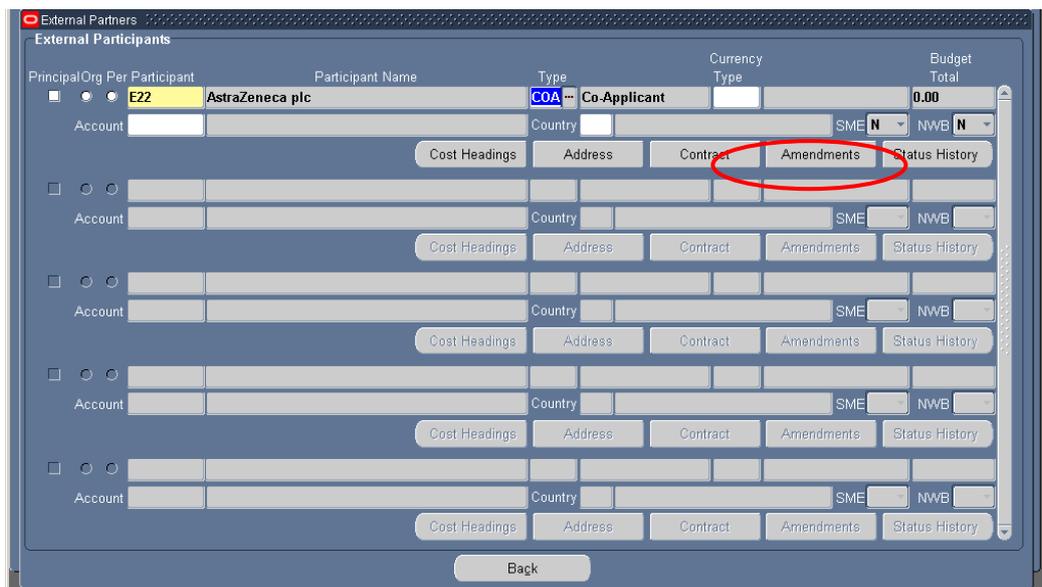
External Participants

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.

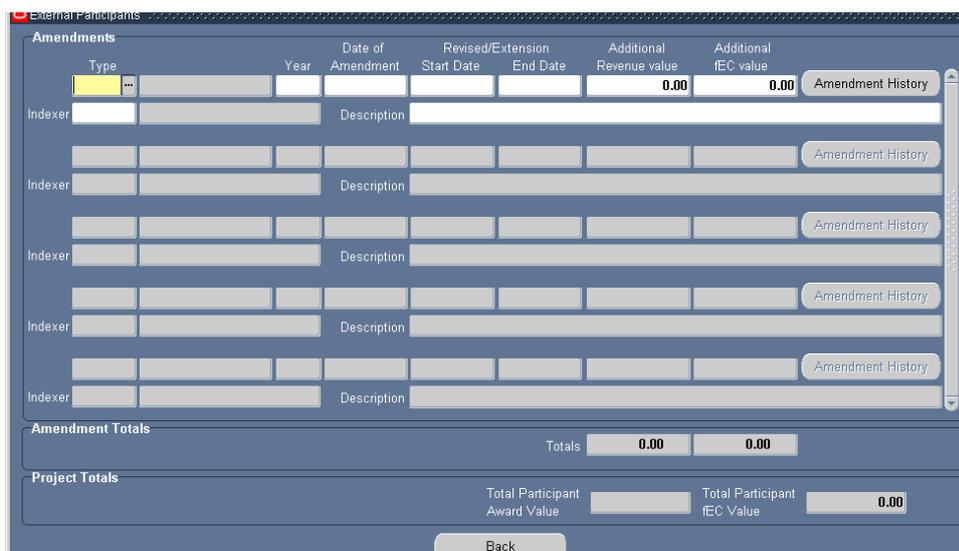
Where a contract is not required e.g. where a Research Council Grant lists a co-applicant in the external participants screen the following process applies.

Open the external participant and click on the amendment button.



The screenshot shows the 'External Partners' window with the 'External Participants' tab selected. It displays a table of participants with columns for PrincipalOrg, Per Participant, Participant Name, Type, Currency Type, and Budget Total. The first row is highlighted, showing 'E22 AstraZeneca plc' with a 'COA' type and a 'Co-Applicant' role. Below the table, there are buttons for 'Cost Headings', 'Address', 'Contract', 'Amendments', and 'Status History'. The 'Amendments' button for the first participant is circled in red.

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



The screenshot shows the 'Amendments' window. It features 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 a value of '0.00' in both the 'Additional Revenue value' and 'Additional fEC value' columns. Below the table, there are buttons for 'Amendment History' for each row. At the bottom, there are 'Amendment Totals' and 'Project Totals' sections, with a 'Back' button.

EC Audit Page

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

Account: E1359 Aerodyne Research
Account: 269404 Aerodyne Research Inc
Type: 89 Other Overseas
Funder/Debtor: Debtor
EC Role: AC Assistant Contractor
SME: N
NW B: N
Buttons: Cost Headings, Address, Indicators, Amendments

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

Application Details
Project EC Audit
EC Audit Screen
If this project is NOT being coordinated by the University of Manchester please ask the Principal Investigator to contact the Project Co-ordinator to establish whether an audit certificate is required for this audit reporting period.
EC Acronym: EC Acronym
WEB Address:
Funder/Debtor: 3M Inc
Address1: ESPE Platz
Address2:
Address3:
City: Seefeld Country: DE Post Code: 92229
Associate Debtor
Audit Dates table:
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.

Project EC Audit
EC Audit Screen
List of Funders
Funder Debtors List
Multiple funder/debtors found, please select the appropriate:
Select Party Number Account Funder/Debtor
 E1359 Aerodyne Research 269404 Aerodyne Research Inc Debtor
 E4255 Bausch & Lomb 269406 Bausch & Lomb Debtor
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