AWARD SEARCH – QUICK REFERENCE GUIDE
FOR RDS CONTRACTS

OVERVIEW

A research Award is created *from a research Application* that has been created by a researcher, approved by Flinders, submitted to a funder, and been successfully awarded a grant from the funder.

Information provided in an Application is carried over into a separate Award record created from that application, checked for accuracy, and additional supporting data is provided.

The Application form is also known as the *pre-award* form, and was historically known as the *certification* form, a term no longer used.

It is the **Award ID** (not the Application ID) that must go on the contract record and on the CIN/CON email in order to be later entered into the TechnologyOne project account by Grants Finance that is critical to ensuring the dashboards work properly and Income for HERDC and Academic Promotions is attributed correctly for researchers.
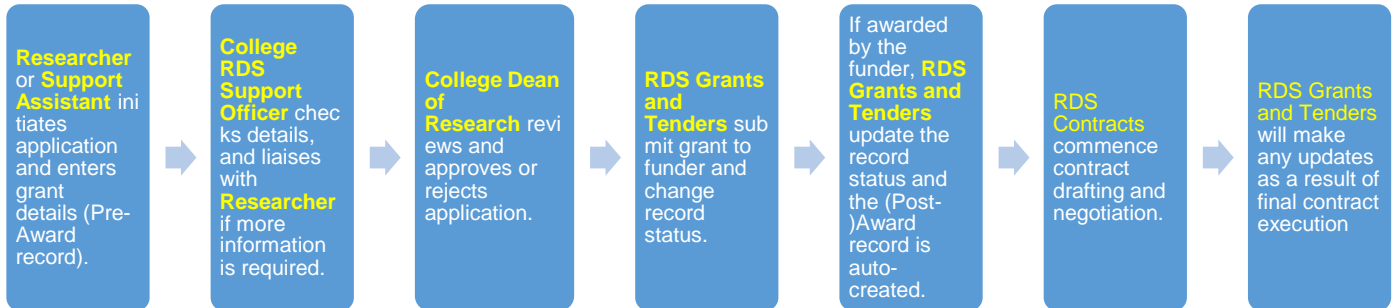
This guide will help you locate the Award ID before you start drafting the contract.

Do not execute contracts until a ResearchNow award record is created by RDS Grants and Tenders. Note that RDS Grants and Tenders do not always get informed when an award is granted.

APPLIES TO ROLES

- Assisting Editor of Awards
- Assisting Editor of Applications
  - an authorised officer in **Research Development and Support** (Contracts Team)

The Research Application Process

Researcher or **Support Assistant** initiates application and enters grant details (Pre-Award record).	**College RDS Support Officer** checks details, and liaises with **Researcher** if more information is required.	**College Dean of Research** reviews and approves or rejects application.	**RDS Grants and Tenders** submit grant to funder and change record status.	If awarded by the funder, **RDS Grants and Tenders** update the record status and the (Post-)Award record is auto-created.	RDS Contracts commence contract drafting and negotiation.	RDS Grants and Tenders will make any updates as a result of final contract execution

PROCEDURE

Here are the steps you should follow.

1. Search for the Award first
2. If found, check the funder details and record the Award ID in the contract system and start the contract create process
3. If not, you can search for the Application to see what stage it is at
4. Optionally, notify someone (eg. Grants and Tenders) with a message

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STEPS FOR LOCATING AN AWARD

Help in the form is available wherever you see the ⓘ symbol. Any field marked with a * must be entered for the form to save.

1. Search for the Award

- Select **ResearchNow** from your Flinders (Okta) dashboard.
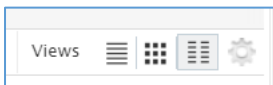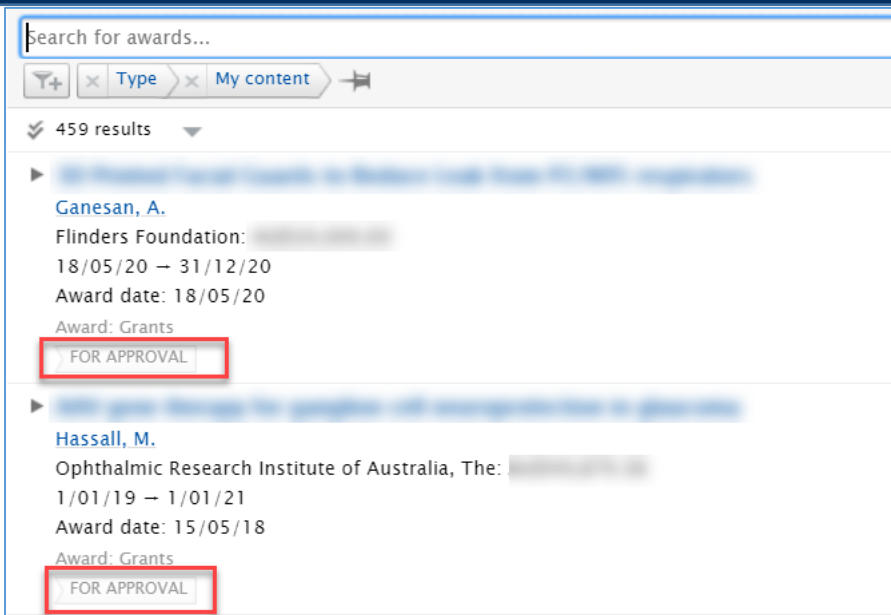

- From the Editor tab,

- Click on **Awards**

- A default list of all awards will appear. Note that the *Award ID* will not be visible in the "table" view of columns. For example…

- Use the layout buttons to the right to change the view (list, matrix, table) or click the cog to vary the fields you see

- The basic "list" view will show a workflow status (see below). This is always defaulted to "FOR APPROVAL" because we do not currently use workflow on the award record. This also means it still can be edited.
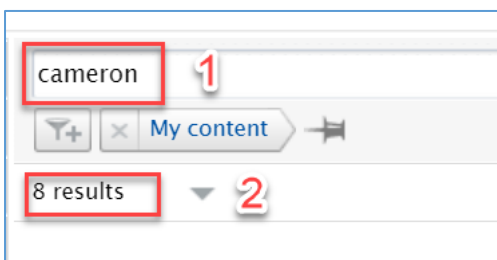
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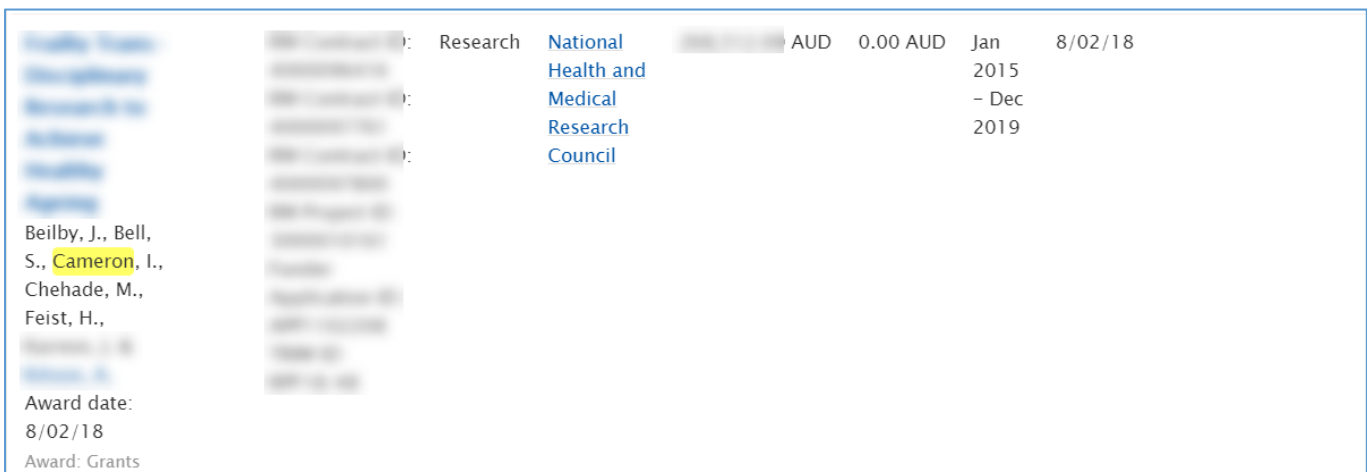
- For a "global" search you can just type any string (eg. Researcher surname, or partial title) into the search area, press enter and the results will be listed
  - If looking for a string of text enclose it in quotes eg. "quality of life"

- The system will highlight the matched text

- Alternately, click on the filter icon to bring up a list of specific fields you can search with eg. **Person** (researcher), **Funder**, **Type** (eg. Grants)
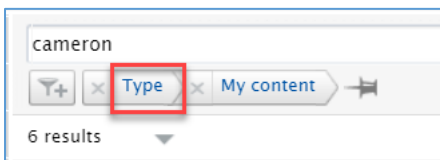
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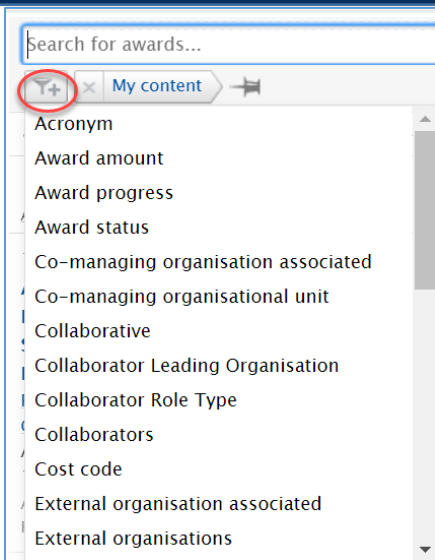
- For example if you filter on **Type**, you can select "Grants" then click **Search**
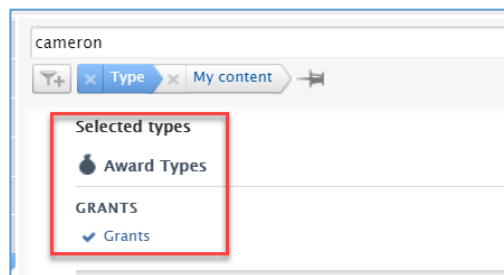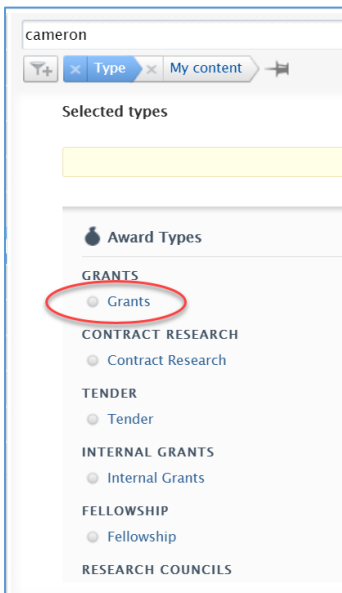
- To clear a filter click the X next to the field name
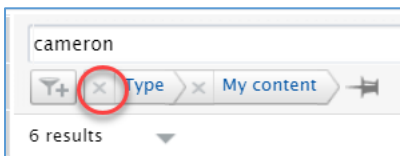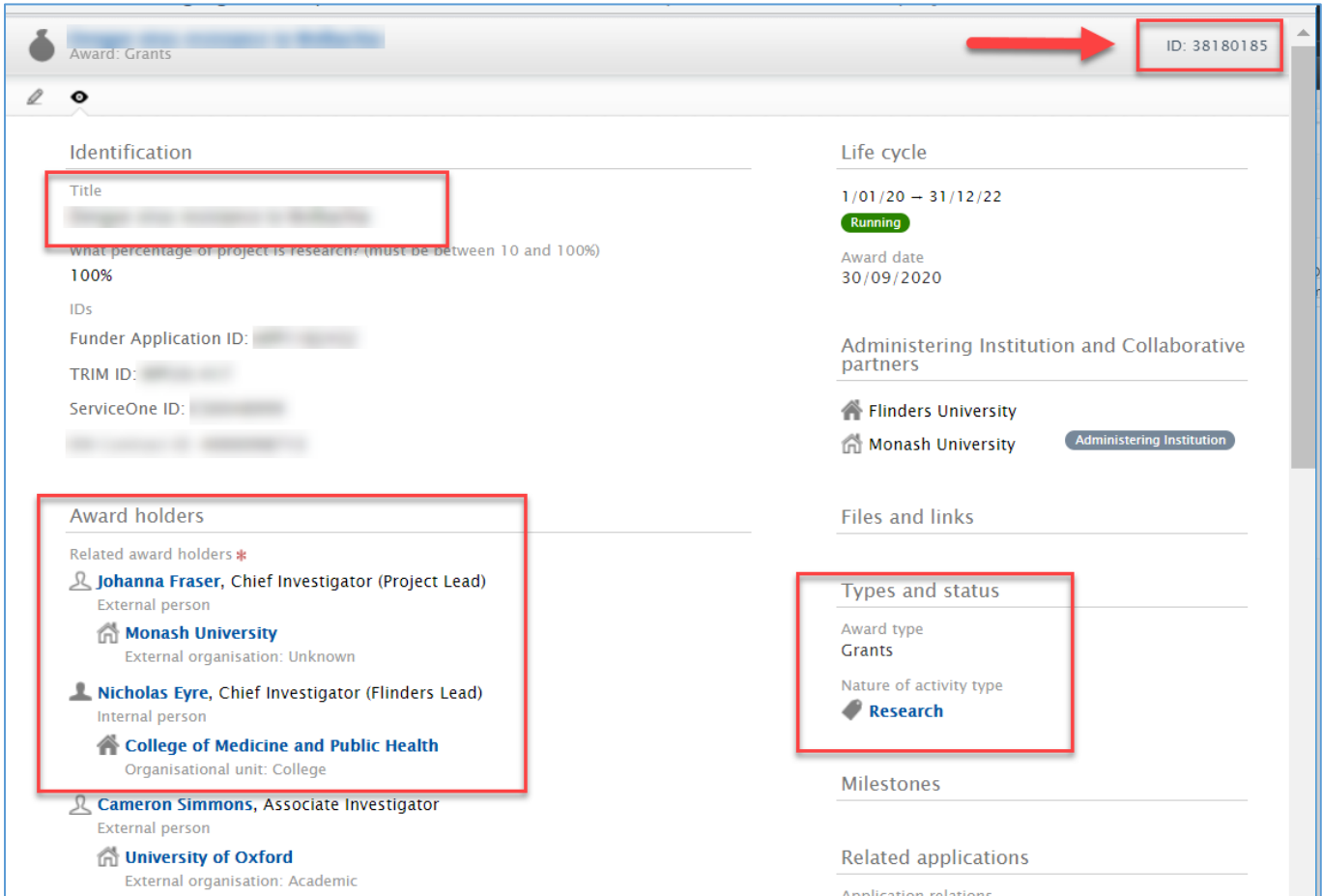
- To edit a filter click on the field name

- If you <u>CANNOT</u> find the award then RDS Grants and Tenders may not have converted the application yet. Go to step 3 if you want to see what stage the *application* is at.
- If you do find the correct Award, you can be sure it has already been approved by the Dean of Research

2. View the Award details

- Scroll through the list looking for the **Award** title you are after
- Click on the blue **Award** title to check the details in the popup (Title, Award Holders, Types and status)
- The **Award ID** is in the top right corner in View mode (and in top left in edit mode)

- You can <u>ignore</u> the workflow status in the bottom grey footer as this workflow is NOT IN USE

- To locate the funding details, scroll down to the **Funding** section and click on a **Funder name**

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- This will put you in award editing mode. Click **Edit** button for a funder

- The funder details popup, which is where you can find **Levy** details and confirm **Awarded Amount**. NOTE: Amounts are always <u>EXCLUSIVE</u> of GST

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- If you need collaborative split details for the contract, then scroll down

- Close the popup by clicking on ⊗ in the top right corner

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- Just below the Funders section you can see the **Life Cycle** section with <u>ACTUAL</u> start/end dates to use on the contract.

- Close the award popup by clicking the **X** in the top right of the window
- Log out from the top right corner of the main screen

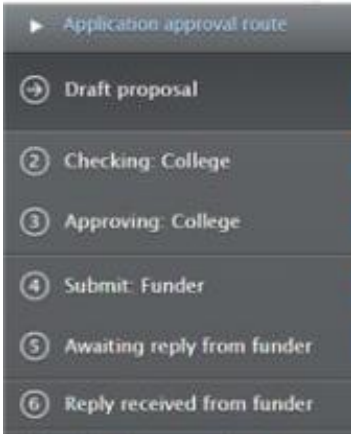Award Search - RDS Contracts Quick Reference Guide v0.3
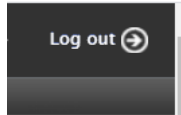
3. Search for an Application

If you cannot find the award, you may want to find out where the Application is up to.

The workflow approval route has the following steps.

If the Dean of Research has approved, then it will have passed step 3.
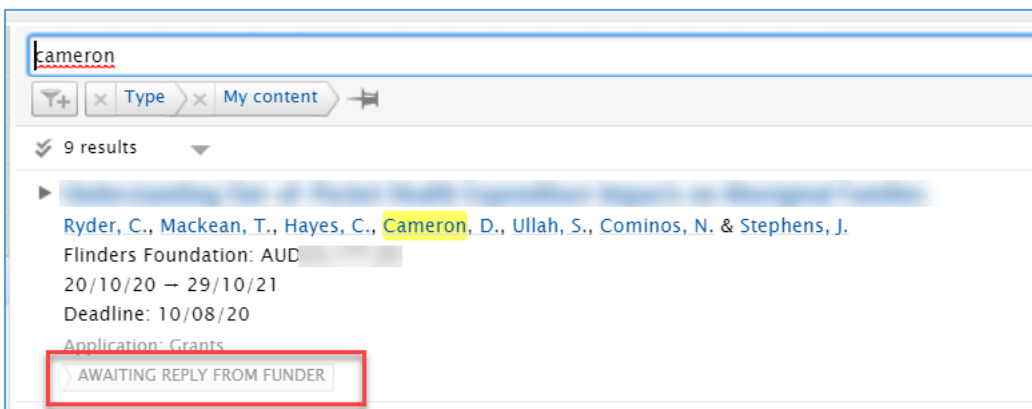

- From the **Editor** tab,

- Click on **Applications**

- A default list of all applications will appear
- The most useful type of view is the "table" as it shows lots of field detail

- Use the filters (as described above) to narrow your search
- Check the status from the simple "list" view. This example application is still "awaiting reply from funder" meaning NOT YET AWARDED

- Here is the other "table" view which clearly shows there is an award because the money bag appears. Click on the money bag to see the popup hyperlink to the award. DO NOT use the "Pure ID" as this is the Application ID.

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- Here is another example of an *application* in a "list" view, that <u>has been awarded by the funder</u>. If this is the one you are looking for you can view the application and click through to the linked award after viewing the application details (see following steps).

- When viewing an *application*, DO NOT USE the ID you can see in the top right, instead scroll down to **Related Awards** to click on the **Award title**, which will give you a popup to open the *Award* record. **NOTE: the related award will <u>only be there</u> if Grants and Tenders have already converted the application to an award.**

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4. Send a message

- You will need to message Grants and Tenders occasionally. For example, if it looks like an application has not been converted to an award yet, or perhaps some levy details are missing from the award record.
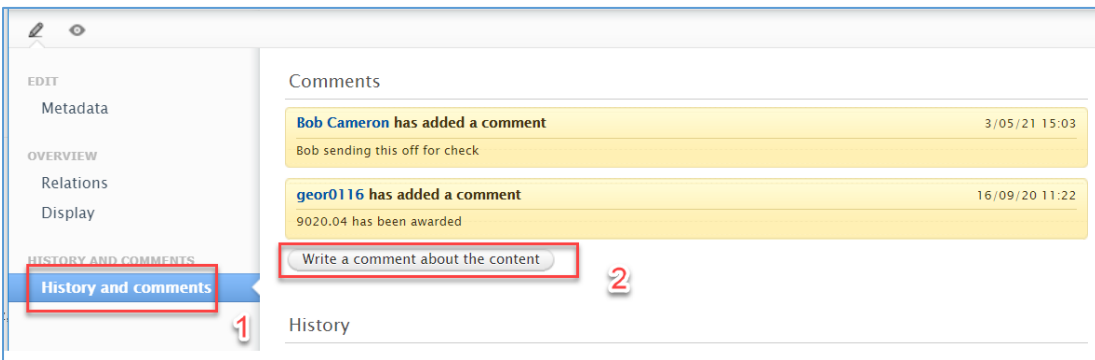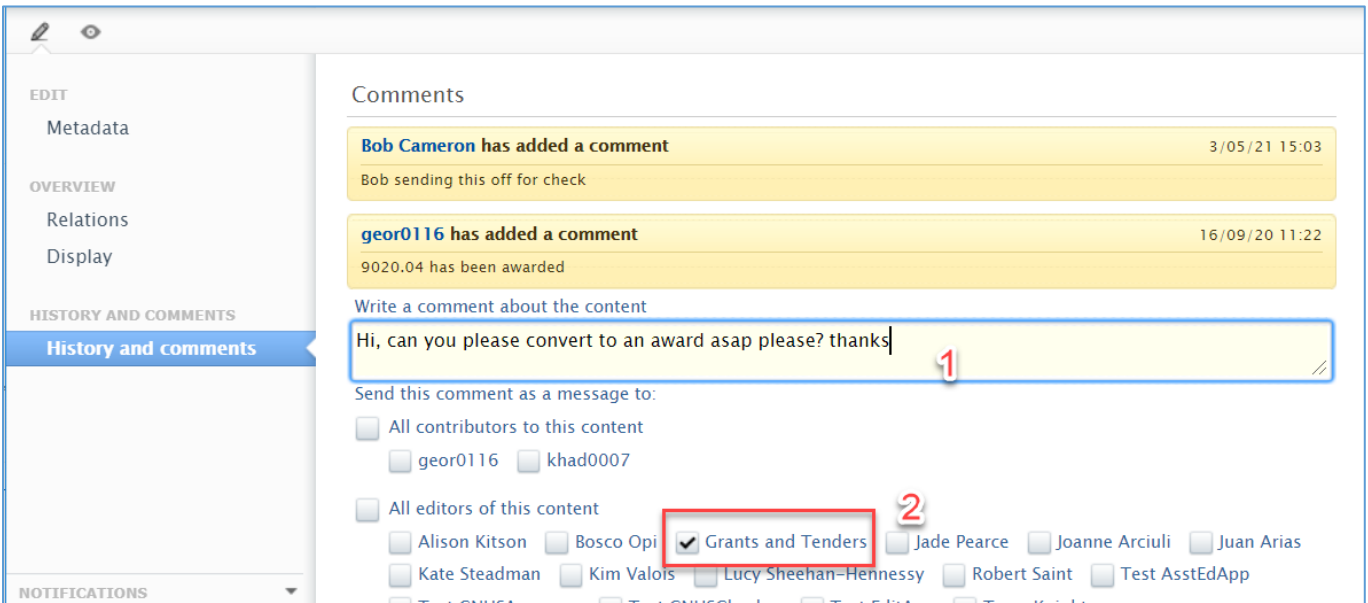- Firstly view your application or award record from the list, and go into **Edit** mode
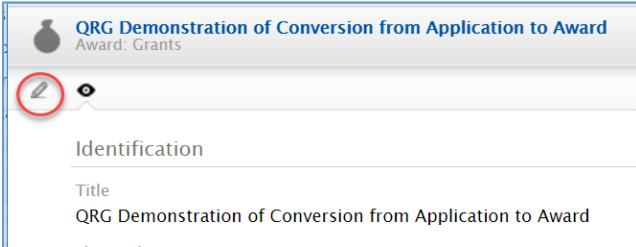
- Click on **History and comments** and then click **Write a comment about the content**

- Type your comment in. If you OPTIONALLY select a recipient(s), they will receive an email with the same comment. The example below shows a message being logged and emailed to "Grants and Tenders" team.

- Then click **Save** at the bottom of screen to log it and send it

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