RESEARCH MASTER PROJECTS MODULE

QUICK REFERENCE USER GUIDE FOR RESEARCHERS
Contents

Access to Research Master Projects Module ................................................................. 3
Log on to the MyResearch Site ....................................................................................... 3
Viewing Projects Table ................................................................................................. 4
The Projects Module ..................................................................................................... 4
Search Function ............................................................................................................ 4
Navigating Specific Project Records ............................................................................. 5
Accessing a Project ......................................................................................................... 5
Cog Wheel ..................................................................................................................... 7
Related Items Categories .............................................................................................. 7
Project Dates .................................................................................................................. 7
Project Details ............................................................................................................... 7
Ethics Clearance Details ............................................................................................... 8
Extension, Transfer & Closure: ...................................................................................... 8
Investigators .................................................................................................................. 8
Org Unit .......................................................................................................................... 8
Classifications ............................................................................................................... 9
Budget Financials ........................................................................................................... 9
Transaction Financials .................................................................................................. 9
Documents ..................................................................................................................... 10
Linked Projects ............................................................................................................. 10
Generating Project Reports .......................................................................................... 11
Crystal Reports .............................................................................................................. 11
Project Budget Report .................................................................................................. 11
Project by Status ........................................................................................................... 12
Access to Research Master Projects Module

Log on to the MyResearch Site

a) Click on the ‘Projects’ Tab at the top of the screen in the black navigation bar
b) Click on ‘Projects’ drop down

Welcome to MyResearch

Please Note:
Approved CSU staff have access to researcher and student profiles and data in Research Master.

Quick Links

<table>
<thead>
<tr>
<th>Higher Degree by Research Students</th>
<th>Project Information</th>
<th>Publication Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Student Portal</td>
<td>• Project Budget</td>
<td>• CSU Research Output (CRO)</td>
</tr>
<tr>
<td>• Higher Degree by Research Policy</td>
<td>• Projects By Status</td>
<td></td>
</tr>
<tr>
<td>• Forms and Guides</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Research Office</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Viewing Projects Table
The Projects Module

- This will show all current projects where you are listed as an investigator.

### Search Function

a) The search default for the projects listing is to show projects marked as ‘Current’.

b) If you would like to show all project records where you are listed as an investigator. Click on the Advanced search hyperlink (top right of screen) and Clear which will clear the current search parameters to show all projects.

c) The listing of projects may carry over to more than one page. Page numbers will be listed at the bottom of the screen and you can navigate back and forward through the listing using Prev/Next.
d) Using the slide bar at the bottom of the project listing table, **Date Applied** (date approved by the DVC-RDI), **Start Date & End Date** (according to the agreement) can be viewed.

**Navigating Specific Project Records**

**Accessing a Project**
- Each project is an active hyperlink. Click on the record to highlight and select.

**Tip:** The titles in the black heading bar can be clicked on to sort & reverse sort the listing of projects.
- The project record will open in one page and to access all the information you will need to scroll down the screen. Use the blue floating arrows on either side of the screen as a shortcut to return to the top of the screen.
Cog Wheel

- To make the project record easier to navigate & view, click on the Cog wheel in the top left corner of the page and select the rolling up arrow and then **Save Layout** this will save the default layout view for all projects to collapse all the **Related Items** fields

- Each of these now collapsed fields are referred to as **Related Items**. To access the information in each field click on the heading to expand each section individually

**Related Items Categories**

**Project Dates**
- **Date Applied** = Date approved by the DVC-RDI
- **Date Approved** = Agreement executed (fully signed)
- **Date Withdrawn** = If submitted to RO or FB and withdrawn
- **Date Rejected** = Application not approved by Funding Body
- **Date Archived/Date Closed Off** = RO dates referring to project closure

<table>
<thead>
<tr>
<th>Date Applied</th>
<th>Date Approved</th>
<th>Date Withdrawn</th>
<th>Date Rejected</th>
<th>Date Archived</th>
<th>Date Closed Off</th>
<th>Closed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/03/2015</td>
<td>04/12/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Project Details**
- **Funding body reference recorded**
- **Type of research drawn from the NTS**

**Funding Reference**: APR1106469
Ethics Clearance Details

- Will now be collected from the NTS

Extension, Transfer & Closure:

Investigators

- List of current and non-current CSU staff on a projects

- Each line is an active record, you can access further information regarding **Position, FTE** (which are taken from the NTS) and **Org Unit** (drawn from HR) by clicking on a selected person.

Org Unit

- This will show the school for each researcher that is linked in HR, plus the lead administering Centre (if applicable) which is taken from the NTS. Where multiple org’s are listed the lead administering will be allocated 100% and marked as **Current & Primary**.
Classifications
- Displays the FoR & SEO codes that have been nominated on the NTS (not ending in 00). The percentage and primary (highest % or when equal the first listed).

<table>
<thead>
<tr>
<th>Code</th>
<th>Classification Name</th>
<th>Percentage</th>
<th>Primary?</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOR-08</td>
<td>Enzymes</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>FOR-08</td>
<td>Structural Biology (incl. Macromolecular Modelling)</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>FOR-08</td>
<td>Infectious Agents</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>SEO-08</td>
<td>Expanding Knowledge in the Biological Sciences</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>SEO-08</td>
<td>Infectious Diseases</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

Budget Financials
- Will be visible for a successful project that has been allocated a fund code. The figures are taken from the approved Budget Approval Form (BAF) and will show the fund code linked to the project.

Transaction Financials
- Visible for a funded project.
- The Income or Expense category will be listed under the Finance Category.
- Income will be shown as Credit figures and excludes GST.
- Comments feed from transaction information from UniMarket & Banner Finance.

Use the navigation slider bar to view the Fund Scheme

<table>
<thead>
<tr>
<th>Fund Scheme:</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Health &amp; Medical Research Council - Project Grants</td>
</tr>
<tr>
<td>National Health &amp; Medical Research Council - Project Grants</td>
</tr>
<tr>
<td>National Health &amp; Medical Research Council - Project Grants</td>
</tr>
</tbody>
</table>
Select one of the transaction item lines and click through into the transaction information screen. **Total Received** (from the invoices raised) & **Total Expended** (from Banner Finance feed).

### Documents

- Listing of documents linked to the project by the RO. Access set to Primary Investigator.

### Linked Projects

- If a project is related to another project it will be listed here.
Generating Project Reports

Crystal Reports

- Project Budget & Projects by Status reports are accessible from Research Master home page under Project Information in the Quick Links Table

<table>
<thead>
<tr>
<th>Home</th>
<th>Projects</th>
<th>Ethics</th>
<th>HDR</th>
</tr>
</thead>
</table>

Project Budget Report

1. Access the Project Budget hyperlink, this will open a new browser tab
2. Enter the project reference number into the Enter Values dialogue box & OK

3. Project Budget report will be generated onscreen. The report is viewable in this format using the slide bars to access all the information (size of the report screen is restricted).
4. To generate a .pdf or .xls format report select export button

5. And select either PDF or Microsoft Excel Workbook Data-only

6. Select Open at dialogue prompt to launch program

Project by Status

1. Access the Project by Status hyperlink, this will open a new browser tab
2. Project by Status report will be generated onscreen. The report is viewable in this format using the slide bars to access all the information (size of the report screen is restricted).
3. To generate a .pdf or .xls format report select export button

![Group Tree](image)

Successful Grants
Pending Application
Withdrawn Application

4. And select either PDF or Microsoft Excel Workbook Data-only

![Export Dialog](image)

Crystal Reports (RPT)
Microsoft Excel (97-2003)
Microsoft Excel (97-2003) Data-Only
Microsoft Excel Workbook Data-only
Microsoft Word (97-2003)
Microsoft Word (97-2003) - Editable
Rich Text Format (RTF)
Character Separated Values (CSV)
XML

5. Select Open at dialogue prompt to launch program

![Open Dialogue](image)

Do you want to open or save viewer.xlsx (428 KB) from myresearchedu.edu? [Open] [Save] [Cancel]