Charles Sturt University

Research Master User Manual: Research Project Request Form

Office of Research Services and Graduate Studies
Charles Sturt University

Executive Summary

The Research Project Request Form (RPR) is used to obtain internal Charles Sturt University approval for all research funding applications submitted to any external funding organisation.

The e-form replaces the need to direct and track individual emails throughout the approval process, improving visibility of approval workflows within one location.

This guide enables Investigators, Approvers, Research Centre Directors and Associate Deans Research to complete and approve the RPR, prior to it being lodged with the Office of Research Services and Graduate Studies (ORGS), the Director Research and Deputy Vice-Chancellor (Research).

The table of contents enables each user to review the action and approval required relative to your role.

For assistance in completing the RPR form or navigating this User Manual please call the Research Grants Team on 02 6933 2578 or email: research@csu.edu.au

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1. Information for Investigators

The Research Project Request (RPR) form is required for all external research applications (including EOIs/proposals/applications/tenders) and should be submitted to the Office of Research Services and Graduate Studies (ORGS) 10 working days prior to the funding body closing date with the required supporting documentation.

All Charles Sturt researchers listed on the grant application will need to sign the RPR form and have their Approver sign the form.

An Approver is usually the HOS of a researcher or the direct supervisor of the names researcher.

For grants administered by a Research Centre, the Centre Director is the final signatory on the RPR once all Approvers have been obtained.

For grants administered by a Faculty, the Associate Dean (Research) is the final signatory on the RPR after all Approvers has been obtained.

The RPR form facilitates the following research management practices within the University:

- School/Centre level approval to commit Charles Sturt University researchers', facilities and resources to participate in an externally funded research project;
- Deputy Vice-Chancellor (Research) institutional approval to submit the application on behalf of the University;
- Research data capture that informs institutional reporting requirements;
- Research performance data for academic staff which informs the EDRS annual review process.

Research Codes

Charles Sturt University uses FOR and SEO Codes as well as Sustainable Development Goals in various institutional reporting to demonstrate the University's research capacity. For research grants data collection, FOR, SEO and SDG codes are collected via the RPR form at the time an application is submitted to Research Services. FOR and SEO codes listed on the RPR should be at the 6-digit level only.

If you require additional assistance in completing the RPR form please telephone ORSGS on 02 6933 2578.

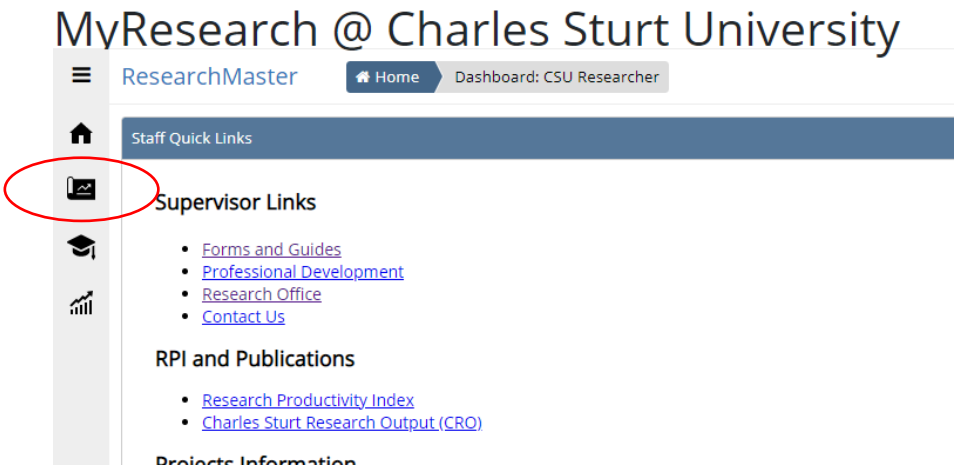
The Research Master User Manual: Research Project Request Form can be accessed https://research.csu.edu.au/research-support/data-methods-and-tools/tools/myresearch

2. Accessing the Research Project Request Form

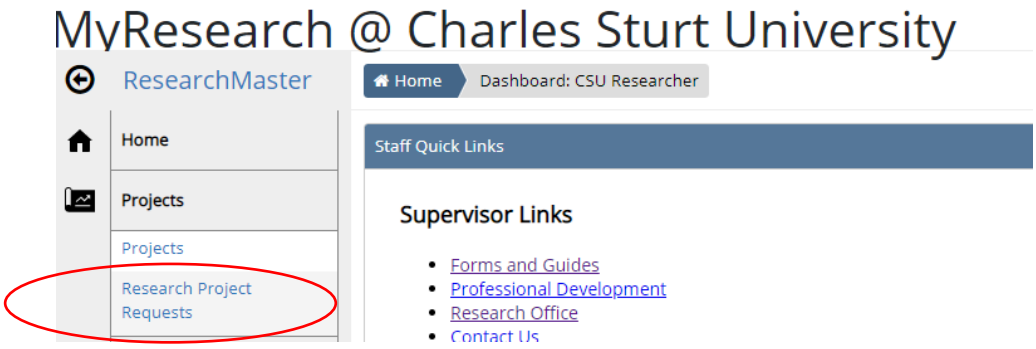
Login to Research Master https://myresearch.csu.edu.au/rme

Enter your CSU User name and password.

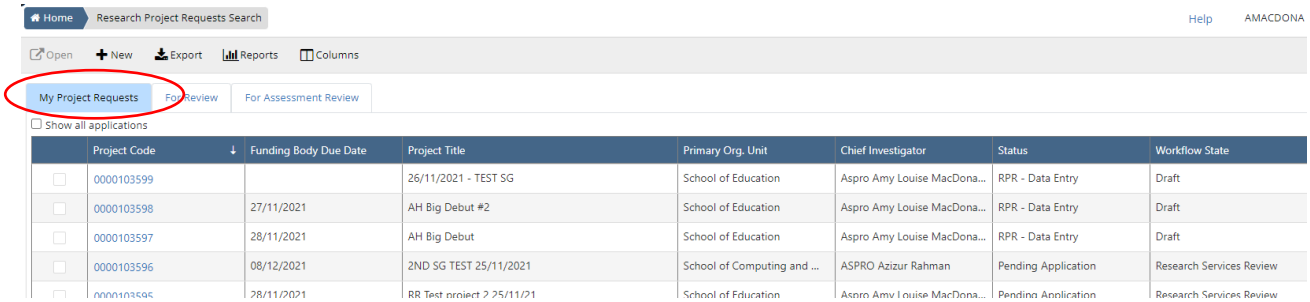
Locate the **Projects Icon** on the left hand side menu and click the icon to open the menu



Select – **Research Project Requests** Form from the Projects Menu



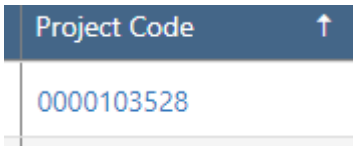
You will first enter the Research Project Requests dashboard page. On this page you will see under the **My Project Requests** tab a listing all your RPR forms in progress or that have been approved.



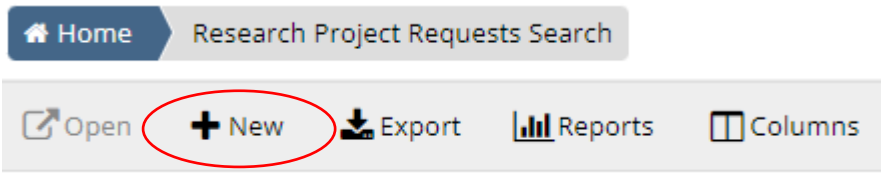
Key fields within this table are the explained below.

Project Code	This code is autogenerated by Research Master when a new PRP form is created. It will be the RM reference code in all correspondence relating to the project.
Funding Body Due Date	The funding body closing date. Or date which the Chief Investigator expects to submit an application to the funding body if a set due date does not exist.
Project Title	Project Title nominated in the RPR form.
Primary Org Unit	The CSU Organisational Unit responsible for the project.
Chief Investigator	The CSU Chief Investigator nominated on the RPR form.
Status	This column will be updated each time a workflow state is completed and is linked to the workflow status.
Workflow State	This column indicates the current workflow status and location of the RPR form.
Number of Days	The number of days the RPR form has been sitting in its current workflow state.

To **open an RPR form** click on the **blue hyperlink in the Project Code column**

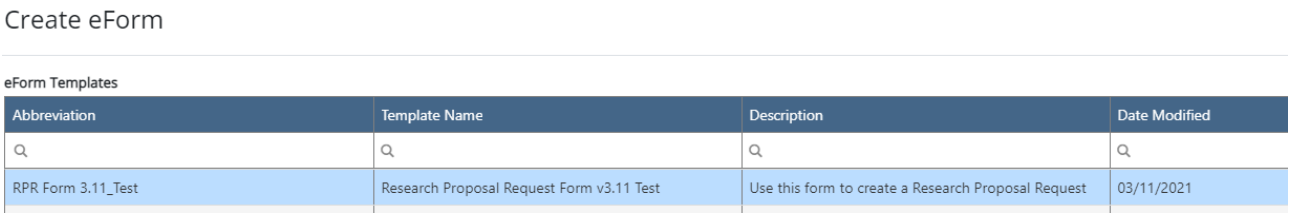


To **initiate a new Research Project Request** – select NEW from the header row

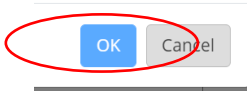


The eForm Template box will open and display like this

Select **– RPR Form** from the eForm Templates by **clicking on the row or template name** – the form will then appear highlighted in blue

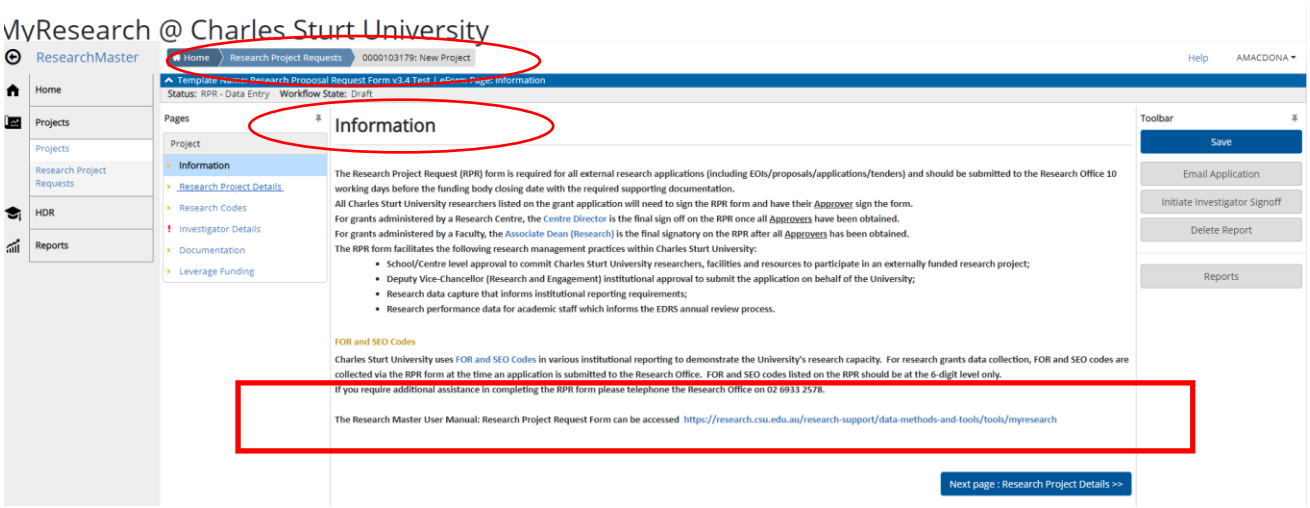


Click on Ok to initiate a new RPR form.



The Page will appear like this – **Your Research Project Request will be allocated a reference number in the top header row**.

You should take note of the **Information Page**, and location of the **Research Master User Manual: Research Project Request Form.**



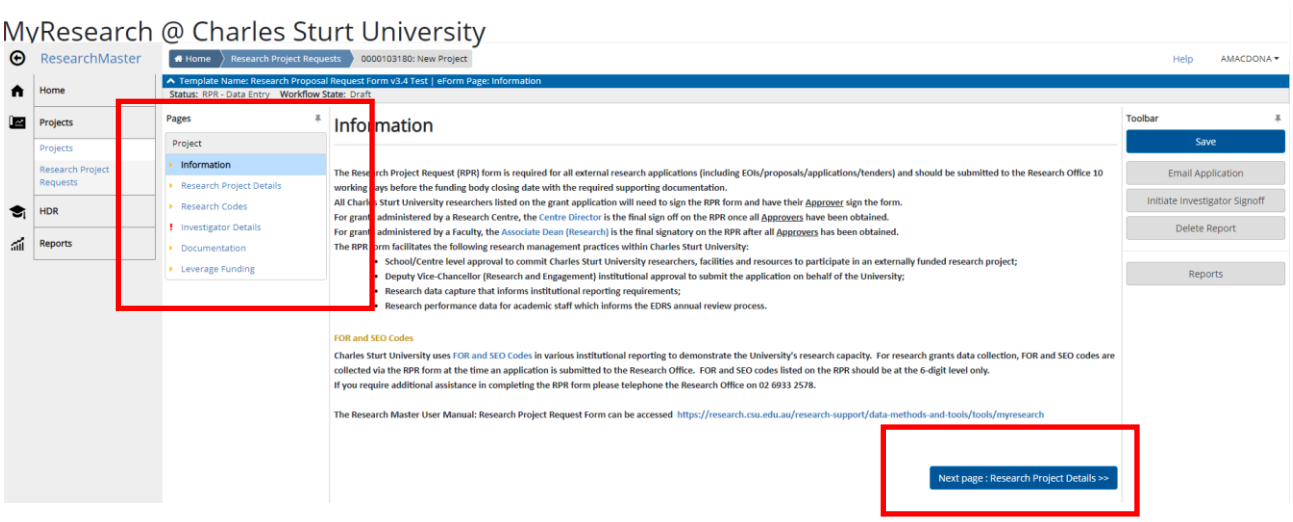
Select

in the bottom right corner to complete the Research Project Details

3. Completing the Research Project Request Form

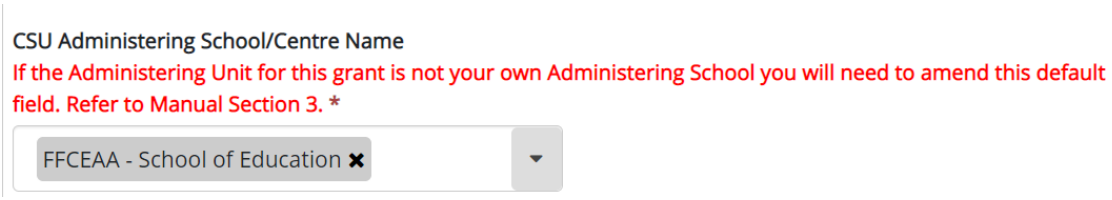
The Chief Investigator is responsible for completing the Project information within the RPR form.

Each section of the form needs to be completed. To move to the next section click on each heading in the pages menu or use the blue 'Next Page' button in the bottom right hand of the screen.



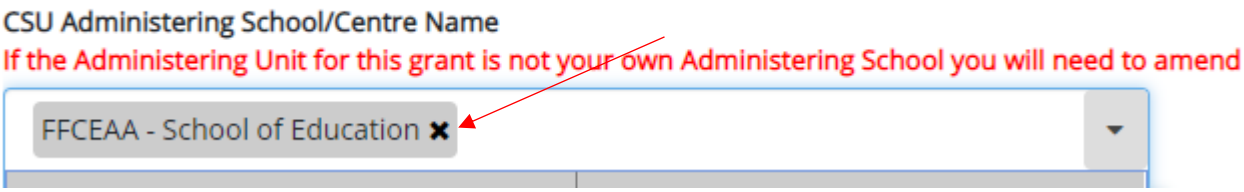
Complete the Research Project Details menu - **NOTE fields marked with an * are mandatory**

- * CSU Administering School / Centre Name – **this will default to the Administering Unit of the Chief Investigator.**

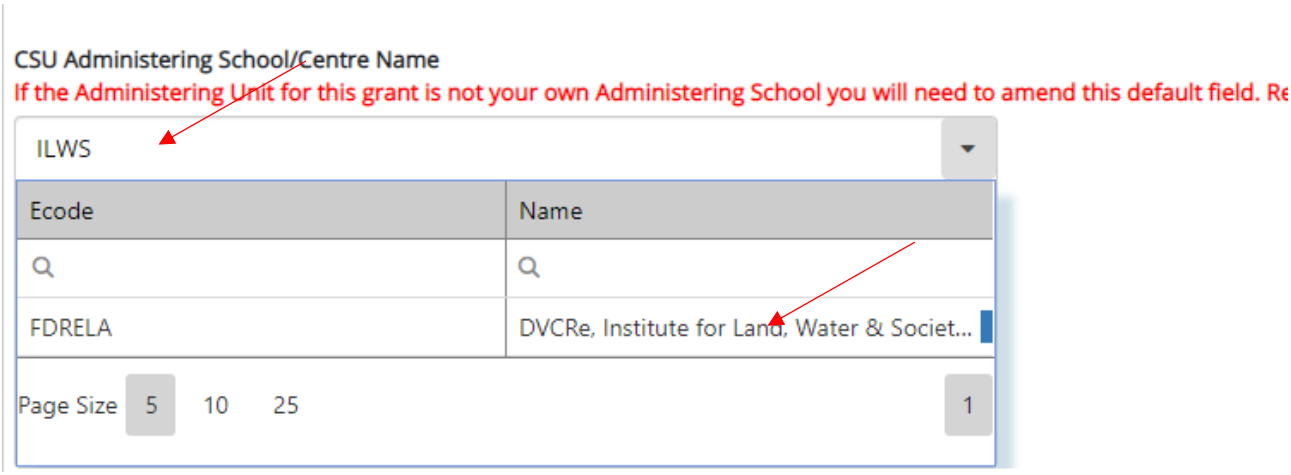


- **If the Administering Unit is different, follow these steps to allocate the correct Administering Unit for this project.**

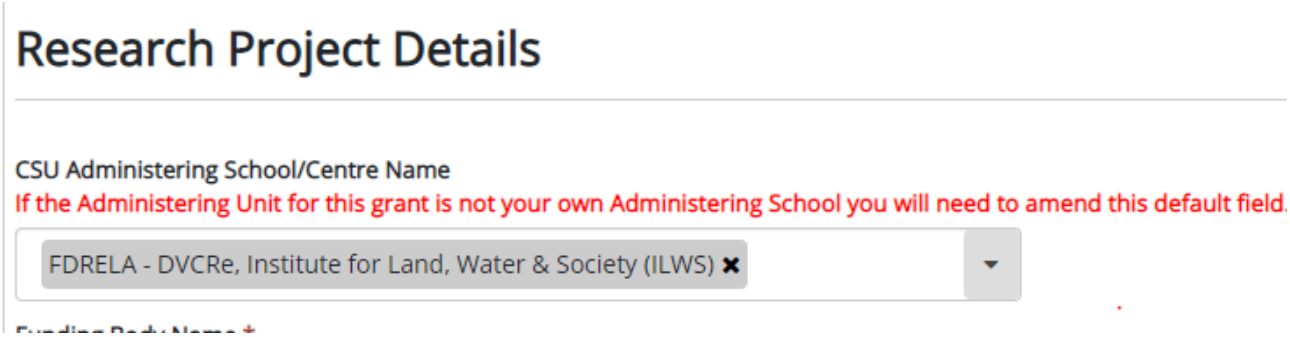
Click in the text box and select the "x" to delete the existing text



Type the name of the Administering School / Research Centre in the box to bring up the selection in the list. **Click on the <u>name in the table to make the selection</u>.**



The nominated CSU Administering School or Research Centre will then populate into the RPR form.



Complete the following items on the Research Project Details page (Note: all fields marked with an * are mandatory)

- * **Funding Body Name** = name of the external funding organisation providing funds
- **Funding Body Scheme Name** = where known, indicate the name of the scheme to which you are applying from the funding body. For example, ARC – Linkage Project
- * **Start Date** – enter the Project Start Date either by selecting the calendar icon or typing directly into the box Date/Month/Year – e.g. 01/06/2021
- *** End Date** – Project End Date - enter the Project End Date either by selecting the calendar icon or typing directly into the box Date/Month/Year – e.g. 01/06/2021
- **Funding Body Contact name** = where known, list the contact name at the funding organisation
- **Funding Body Contact Number or email address** = list the telephone number or email address relevant to your funding body contact
- * **Funding Body Due Date** = funding body closing date for the submission of the application or the date expected to be submitted to the funding body by the Chief Investigator
- * **Project Title** – click in the box and enter the project title
- * **Lead Institution** submitting the application to the funding Body
- * **Total Funding Requested (GST exclusive)** = total amount of funds requested in the project budget (enter numeric value only e.g $50,000 should be entered as 50000). Note this excludes in-kind contributions.
- *** Is the total grant funding requested over $1m? – select Yes or No**
- * **Funding administered by CSU (GST exclusive)** – total amount of grant funding to be retained by CSU for CSU led projects / Share of grant income to be received by CSU for non-CSU led projects
- * **Defence Trade Controls** – Does this proposal fall within the Defence Trade Controls Act 2012? - **select Yes or No**
- * **Type of Research** – click in the box and **enter 100** against the correct research category
- * **Ethics Approval** – Do you require Ethics Approval to conduct this research project? – **select Yes or No**

An example of a populated Research Project Details page is below

Research Project Details

CSU Administering School/Centre Name
If the Administering Unit for this grant is not your own Administering School you will need to amend this default field. Refer to Manual Section 3. *

FDRELA - DVCRe, Institute for Land, Water & Society (ILWS) ✖

Funding Body Name *
RM Test Lab

Funding Body Scheme Name
Go Live Manual

Start Date *
28/11/2021

End Date *
31/12/2021

Funding Body Contact Name
Lucy Smith

Funding Body Contact Details (telephone or email address)
lsmith@rmlab.com

Funding Body Due Date *
21/11/2021

Lead Institution submitting the application to the Funding Body *
Charles Sturt

Total Funding Requested (GST exclusive) *
60000

Is the total grant funding requested over $1m? *
○ Yes
◉ No

Funding administered by CSU (GST exclusive) *
50000

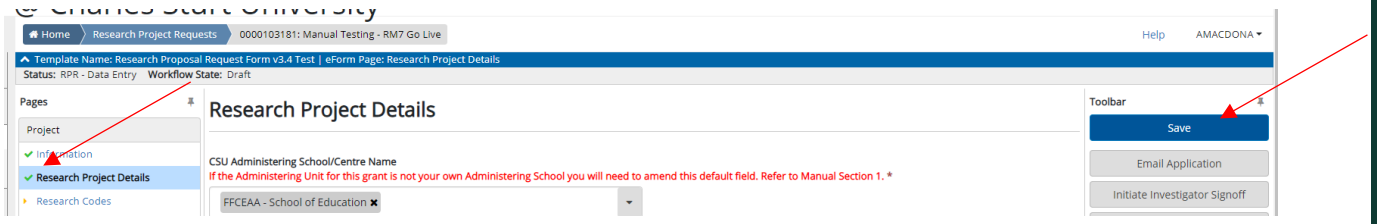
Does this proposal fall within the Defence Trade Controls Act 2012? *
◉ Yes
○ No

Type of Research *

Strategic Basic	Pure Basic
0	0
Experiment Dev	**Applied**
0	100
	Total %
	100

Do you require Ethics approval to conduct this research project? *
◉ Yes ○ No

<u>PRESS SAVE</u> before moving to the next Menu Item. You will note the green tick now validates the section as completed.



To move to Research Codes – use the Next Page in the bottom right hand corner

Complete the Research Codes

On this page you will be required to enter data for Field of Research (FOR), Socio-Economic (SEO) and Sustainable Development Goals (DSG) codes.

A **minimum of one** and a **maximum of 3 codes** should be selected in each category and **totals for each category must equal 100%**.

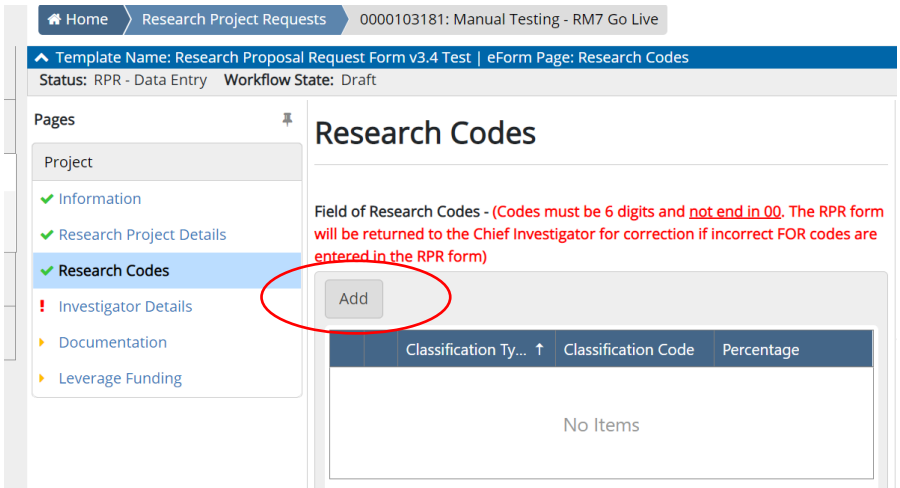
FOR and SEO Codes must be 6 digits and not end in 00. ORSGS will return the RPR form to the Chief Investigator for correction if incorrect FOR and SEO codes are entered in the RPR form.

NOTE: If you know the FOR and SEO codes relevant to your project you can directly add the codes into the form.

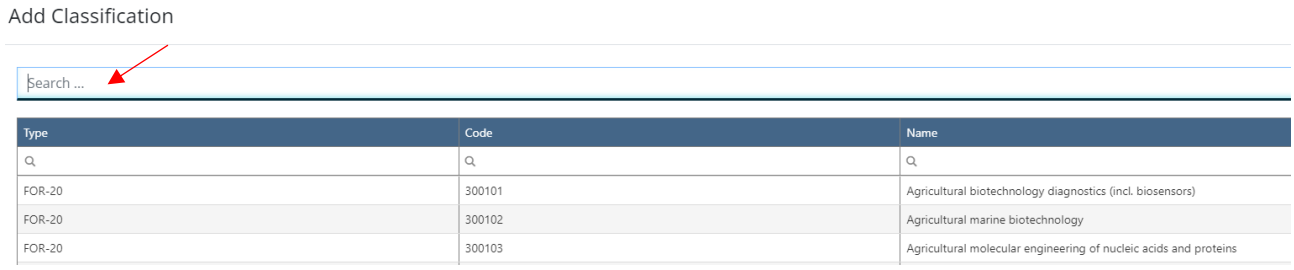
We recommend you view the full 2020 FOR/SEO code list to select an appropriate code classification relevant to your area of research and then enter the correct codes directly into the RPR form.

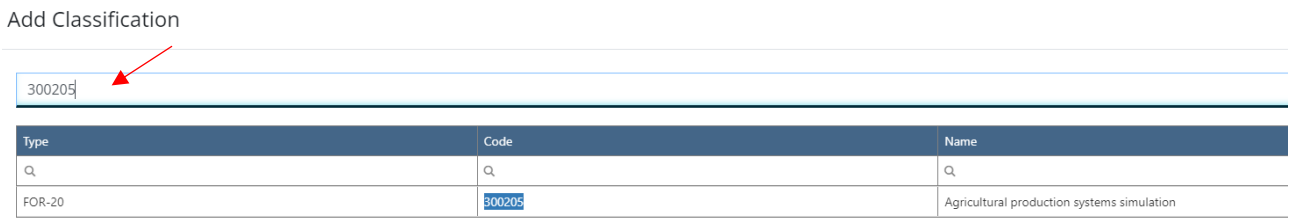
Adding Field of Research Codes

Select the Add Button



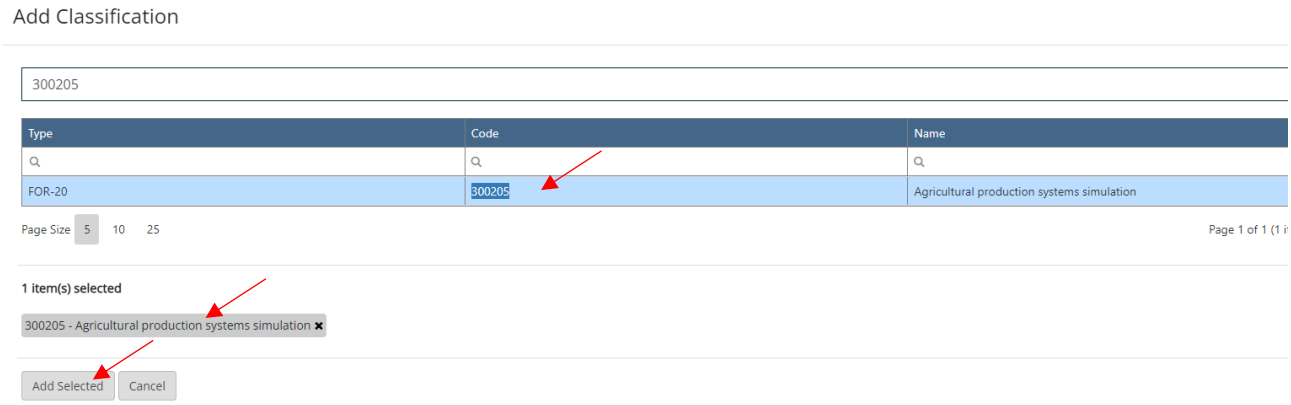
The form will open to the FOR search screen as per below. **If the FOR code/name is known you can type directly into the search text box – narrowing your search to select the applicable FOR code/name.**





Click on the code to highlight your selection (it will highlight in blue) and appear below the add Classifications box as a selected item.

Press the Add Selected box to add the selected FOR code to the RPR form.

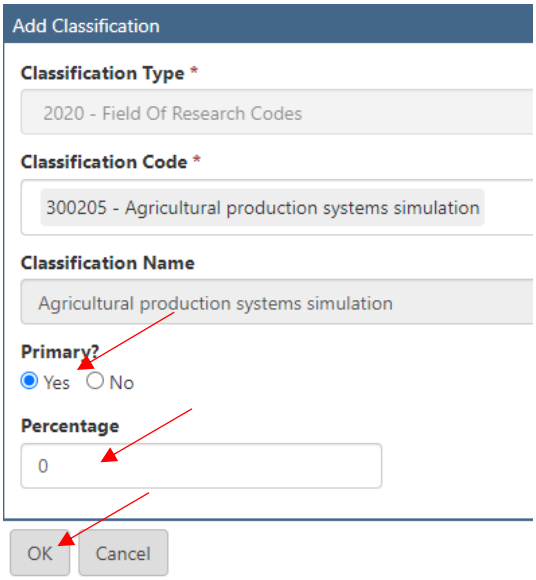


You need to complete three actions:

Primary - select Yes or No.

Enter % out of 100.

Select ok.



The FOR code will then be added to the form.

	Classification Type	Classification Code	Percentage
Classification Type: 2020 - Field Of Research Codes (Total: 100)			
	2020 - Field Of Research Codes	300205	100

<u>To add additional FOR codes (maximum of 3 codes – total 100%)- repeat the above steps.</u>

Note: If you save your RPR form record and you have not populated mandatory questions you will see error messages appear on the screen – highlighted with an ! and in pink

This error message is telling you the SEO and SDG questions have not been completed

Research Codes

Question grid [Socioeconomic Codes - (Codes must be 6 digits and...] requires mandatory information **Go to question**
Question grid [Sustainable Development Goals] requires mandatory information **Go to question**

Field of Research Codes - (Codes must be 6 digits and not end in 00. The RPR form will be returned to the Chief Investigator for correction if incorrect FOR codes are entered in the RPR form)
Review full codes here *

Add

	Classification Type	Classification Code	Percentage
Classification Type: 2020 - Field Of Research Codes (Total: 100)			
	2020 - Field Of Research Codes	300205	100

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Socioeconomic Codes - (Codes must be 6 digits and not end in 00. The RPR form will be returned to the Chief Investigator for correction if incorrect SEO codes are entered in the RPR form)
Review full codes here *

Add

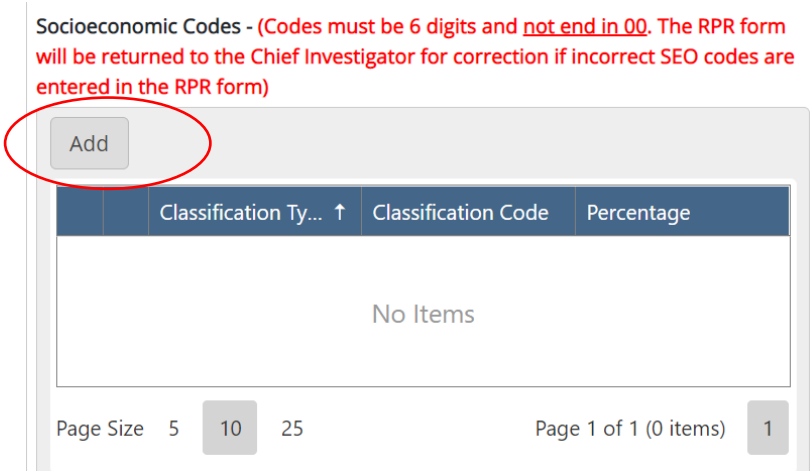
Classification Type	Classification Code	Percentage
No Items		

Page Size 5 10 25 Page 1 of 1 (0 items) 1

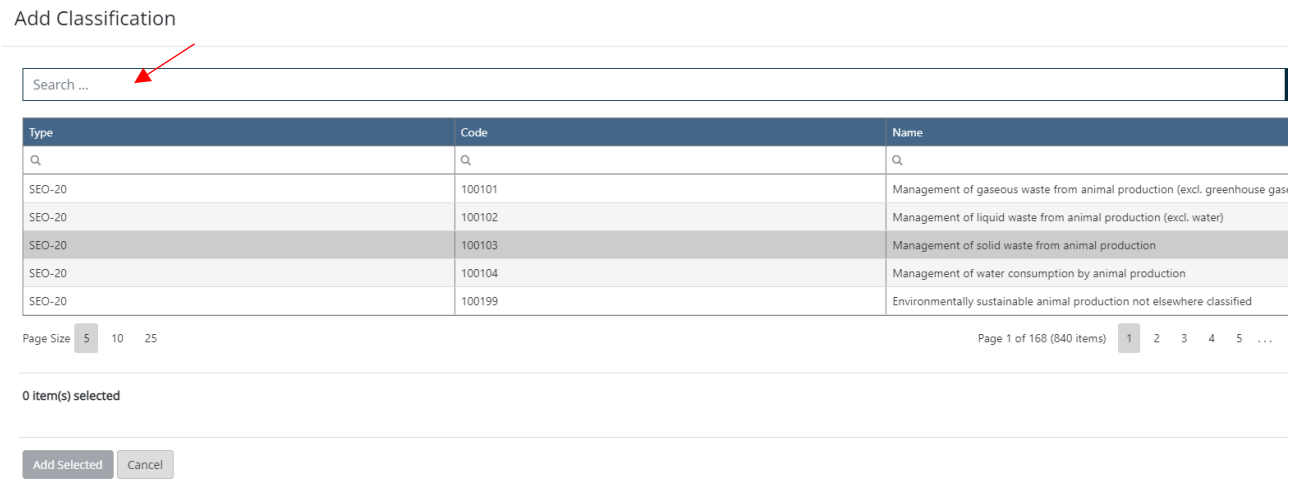
Question grid requires mandatory information

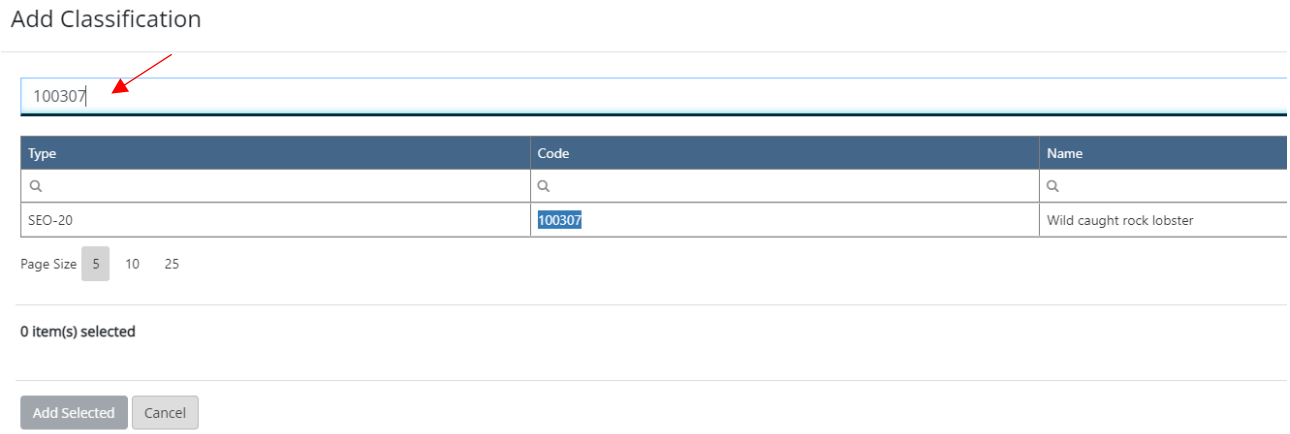
Adding Socio Economic Codes

Select the Add Button



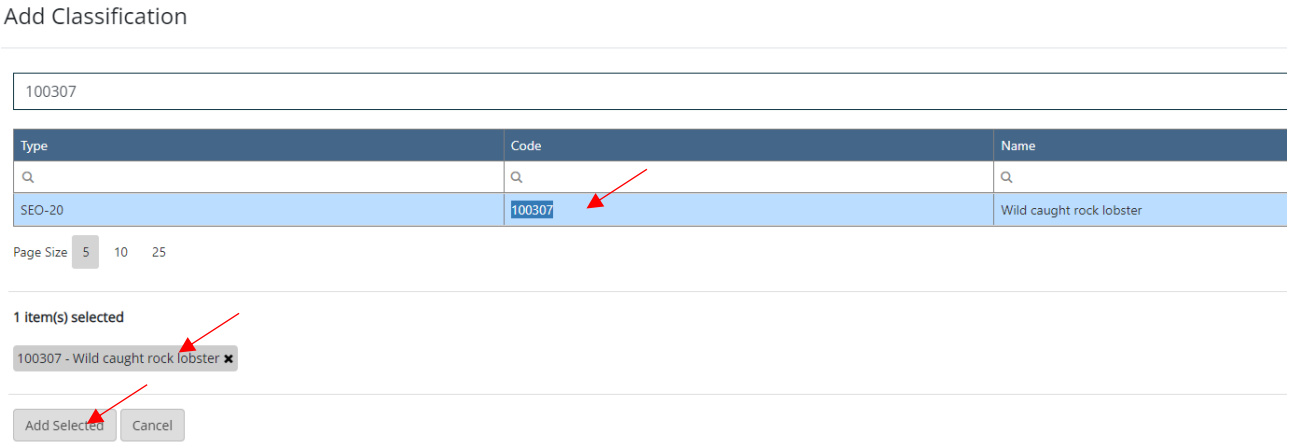
The form will open to the SEO search screen as per below. **If the SEO code/name is known you can type directly into the search text box – narrowing your search to select the applicable SEO code/name.**





Click on the code to highlight your selection (it will highlight in blue) and appear below the add Classifications box as a selected item.

Press the Add Selected box to add the selected SEO code to the RPR form.

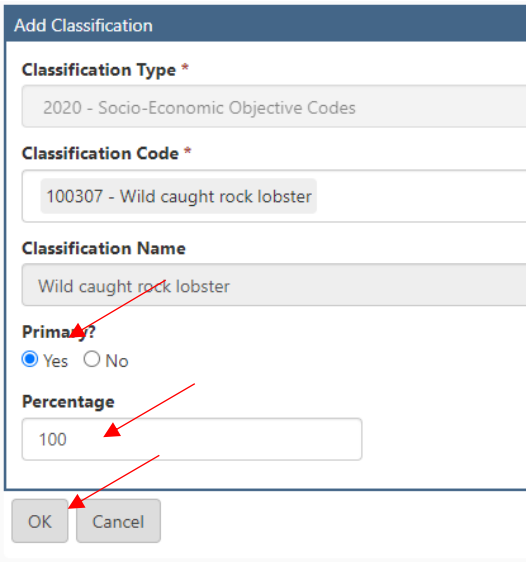


You need to complete three actions:

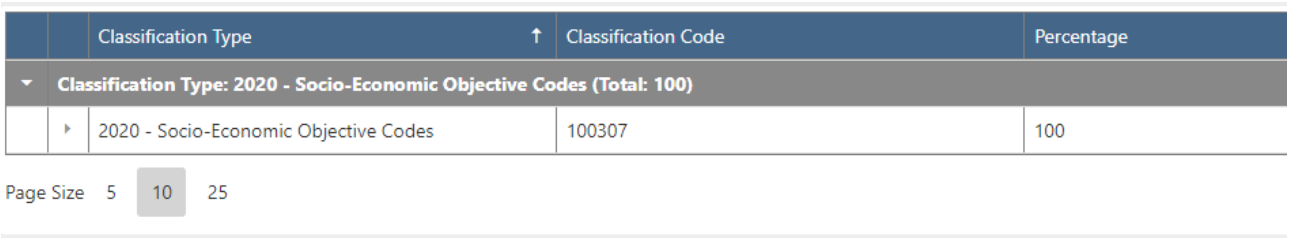
Primary - select Yes or No.

Enter % out of 100.

Select ok.



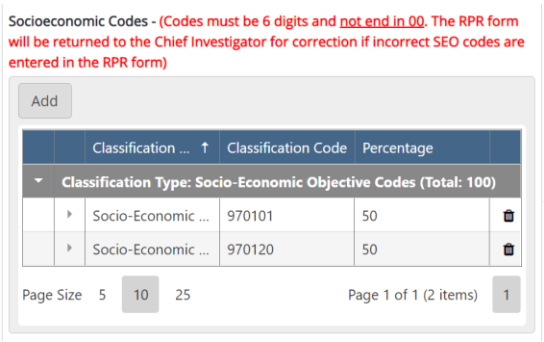
The SEO code will then be added to the form.



	Classification Type	Classification Code	Percentage
	Classification Type: 2020 - Socio-Economic Objective Codes (Total: 100)		
	2020 - Socio-Economic Objective Codes	100307	100

Page Size 5 10 25

To add additional SEO codes (maximum of 3 codes – total 100%)- repeat the above steps. The example below shows two SEO codes added at 50% each.



Socioeconomic Codes - (Codes must be 6 digits and not end in 00. The RPR form will be returned to the Chief Investigator for correction if incorrect SEO codes are entered in the RPR form)

Add

	Classification ...	Classification Code	Percentage
	Classification Type: Socio-Economic Objective Codes (Total: 100)		
	Socio-Economic ...	970101	50
	Socio-Economic ...	970120	50

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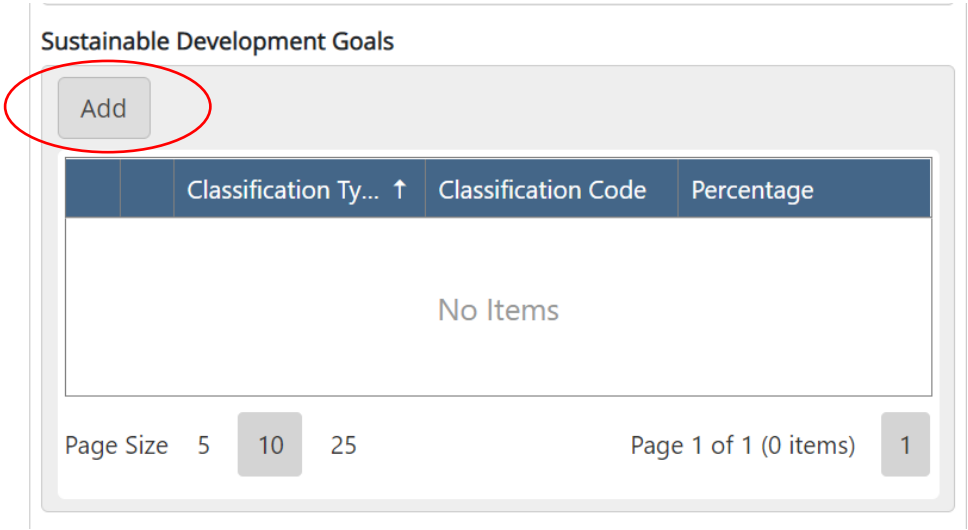
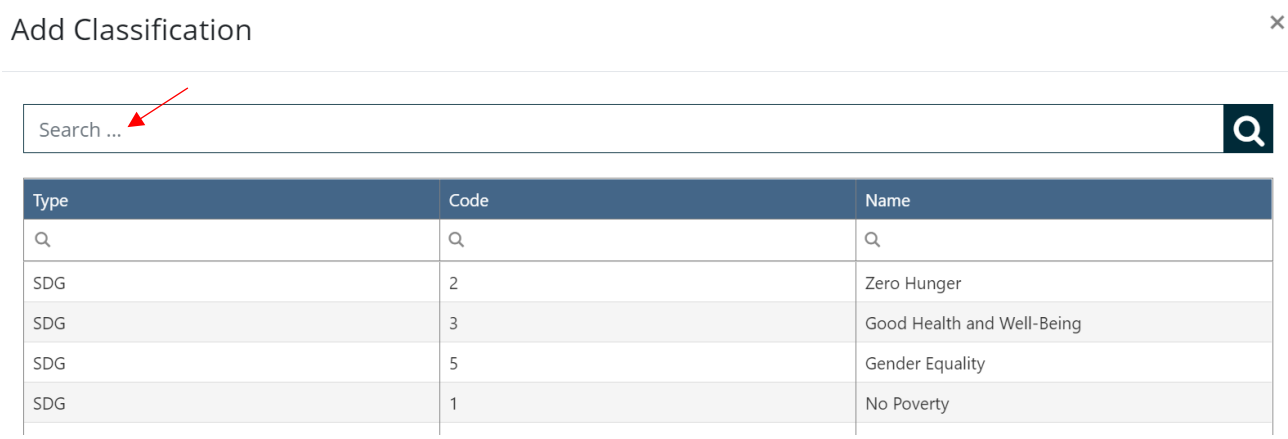
Adding Sustainable Development Goals (SDG)

Select the Add Button

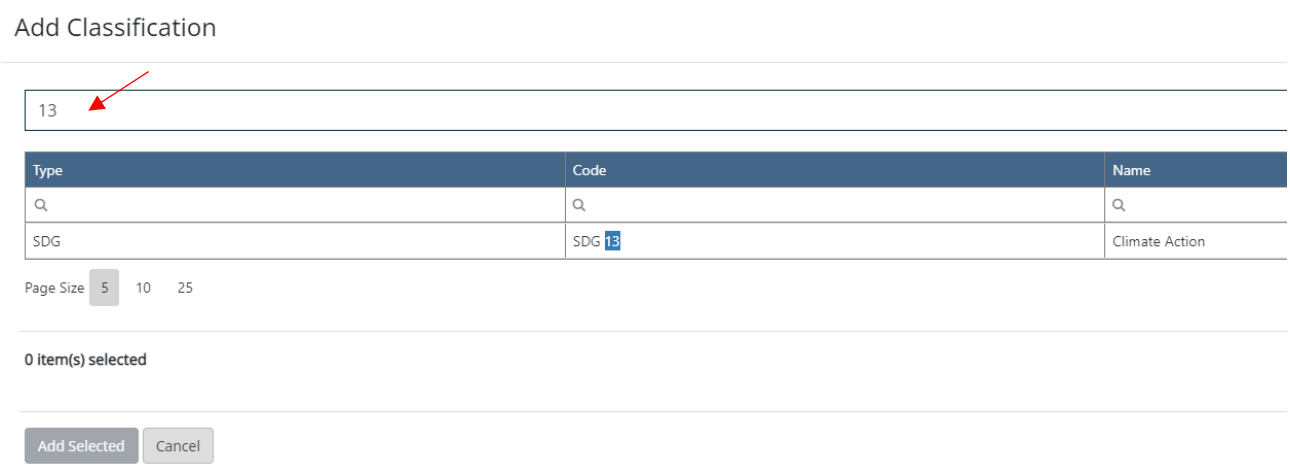


The form will open to the SDG search screen as per below. **If the SDG code/name is known you can type directly into the search text box – narrowing your search to select the applicable SDG code/name.**

We encourage you to view the list of SDGs and their impact via https://www.csu.edu.au/sustainability/about-us/sdgs - you will be able to **identify which SDG code is applicable to your project.**

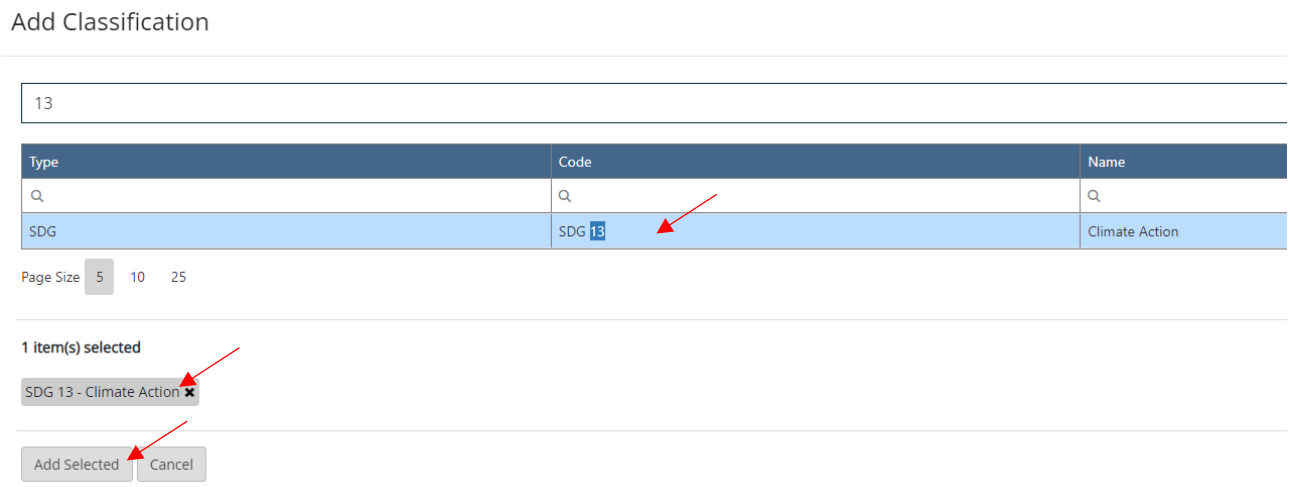


Type your SDG code into the classifications field



Click on the code to highlight your selection (it will highlight in blue) and appear below the add Classifications box as a selected item.

Press the Add Selected box to add the selected SEO code to the RPR form.

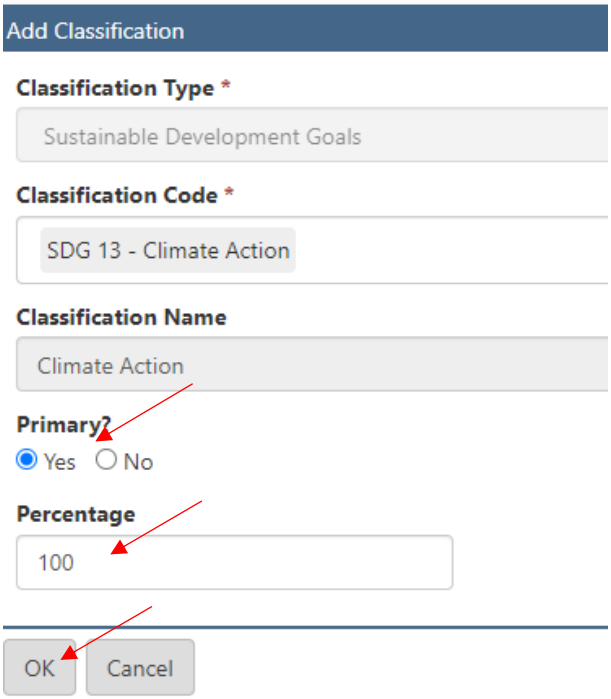


You need to complete three actions:

Primary - select Yes or No.

Enter % out of 100.

Select ok.

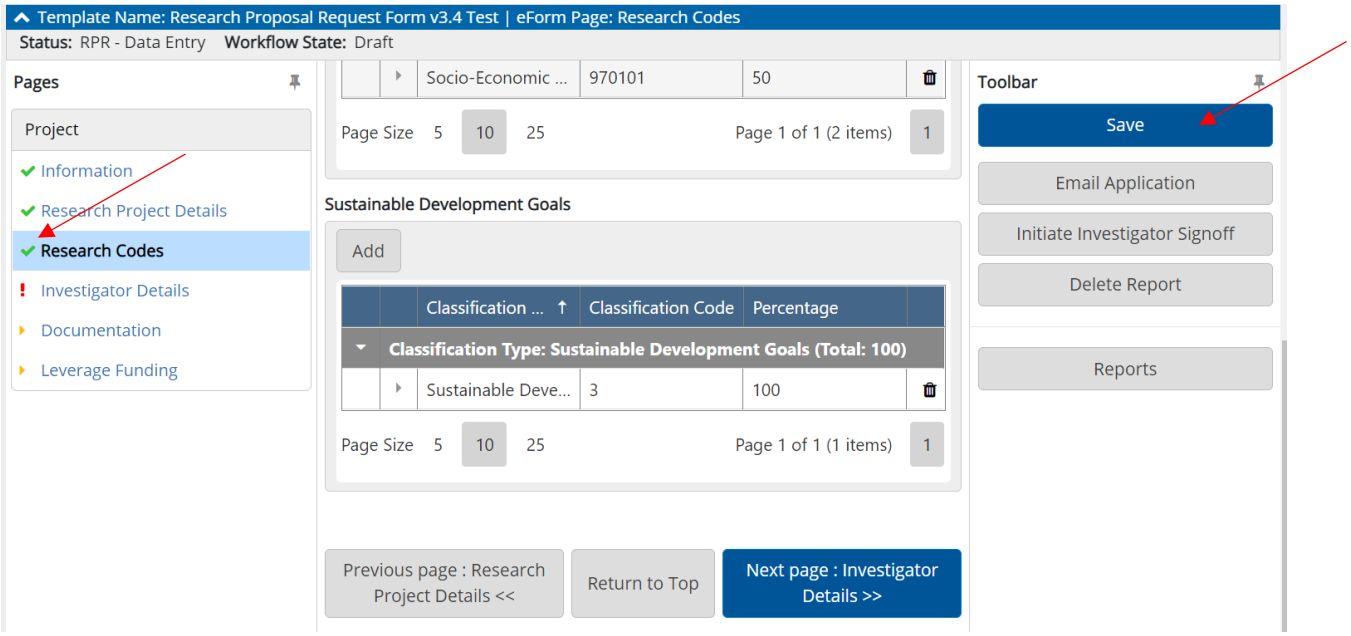


The SDG code will then be added to the form.

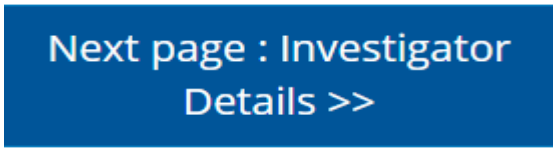
		Classification Type	Classification Code	Percentage
	Classification Type: Sustainable Development Goals (Total: 100)			
		Sustainable Development Goals	SDG 13	100

To add additional SDG codes (maximum of 3 codes – total 100%) - repeat the above steps.

<u>Press Save</u> before moving to the next Menu Item. You will note the green tick now validates the section as completed.



To move to Investigator Details – use the Next Page in the bottom right hand corner.



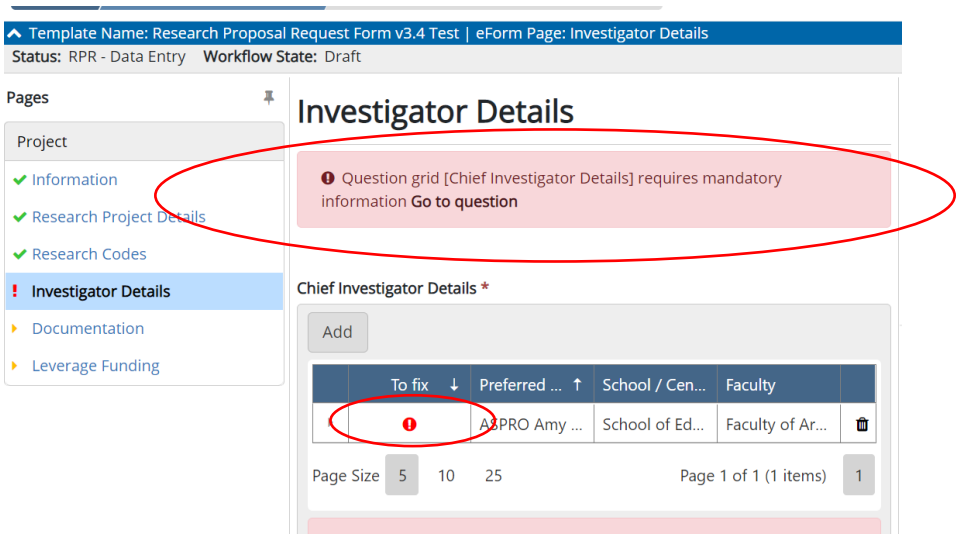
Investigator Details

Step 1 – Finalising the Chief Investigator Record

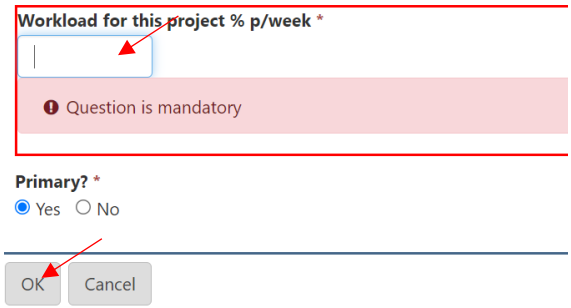
The Investigator details page will open showing an error message. This error message is requesting the Chief Investigator to finalise their information.

The **Chief Investigator** needs to add their **% time** to the RPR form.

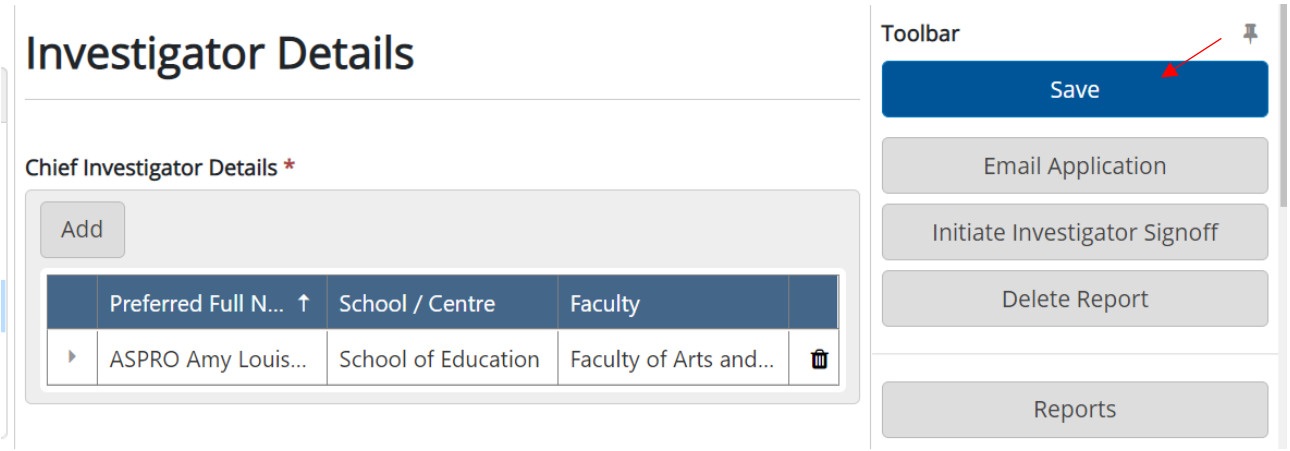
Open the Chief Investigator page by clicking on the ! icon .



Locate the error message in the red box **Workload for this project % per week and enter the %**. For example 50% enter as 50. **Select OK**.



Press Save to update the record and remove the error notification.

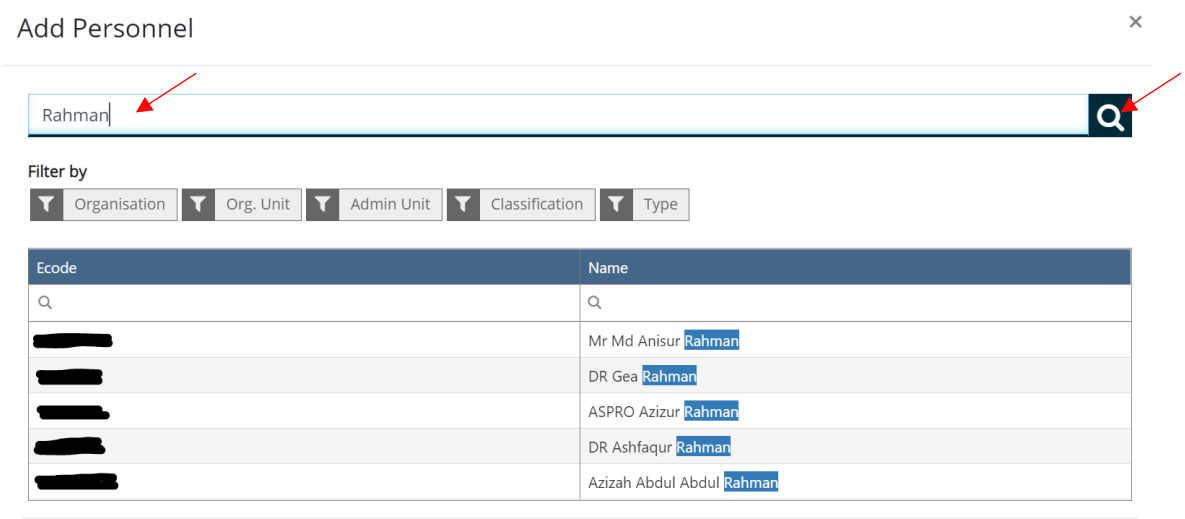


Step 2 - Adding Co Investigators (CSU researchers only)

Select the Add button under Co-Investigator Details

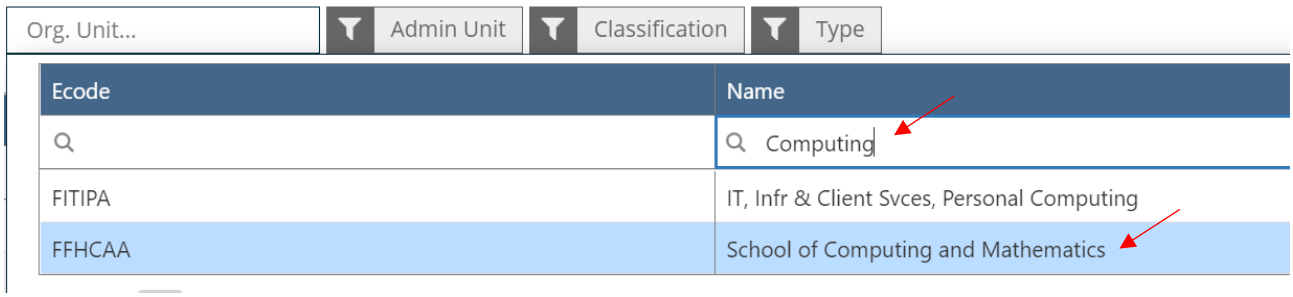
- To search by surname - Type the **Surname** of the CSU Co-investigator into the **search box**

A text box will open listing the personnel

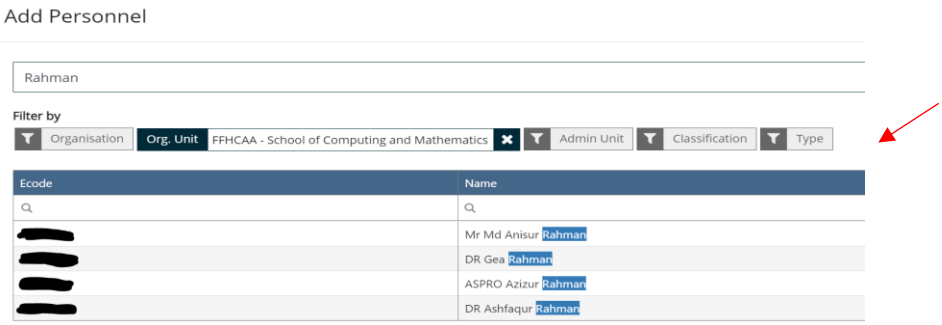


Use the Org Unit filter to narrow the search. Click on Org Unit field.

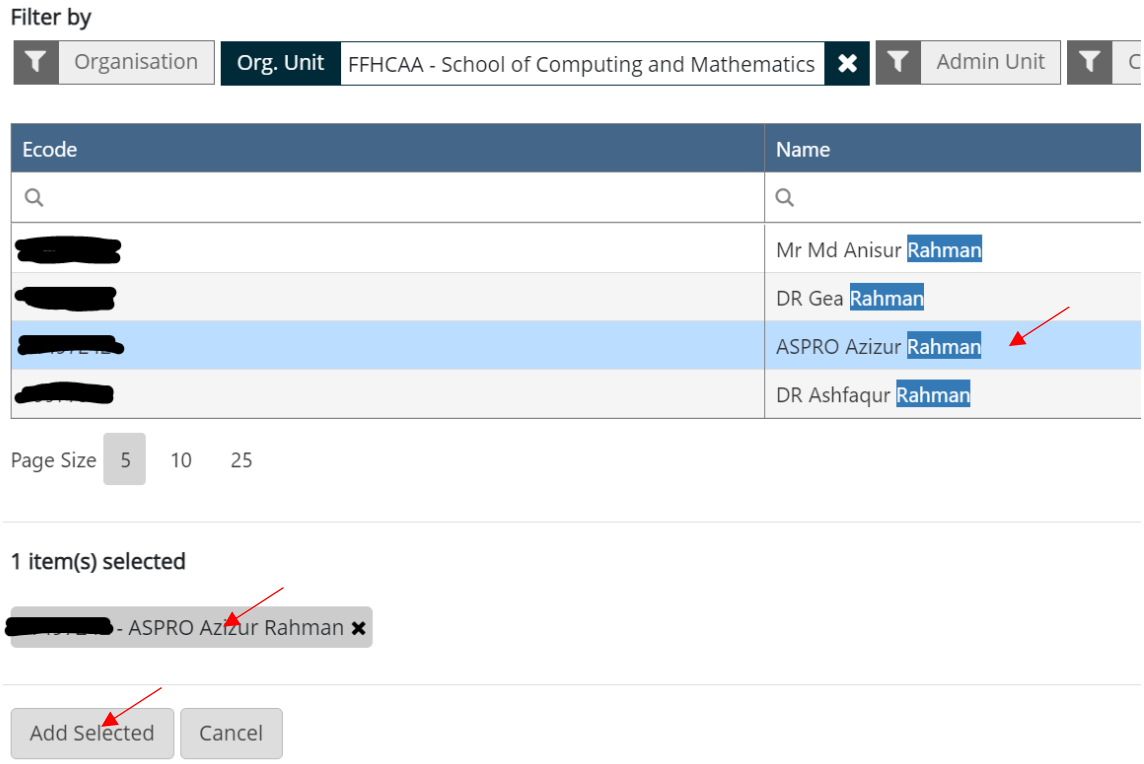
The search box will open as per the image below. Type the name or keyword of the School / Org Unit to narrow your search. Click preferred selection from the list in the Name column.



The search looks like this

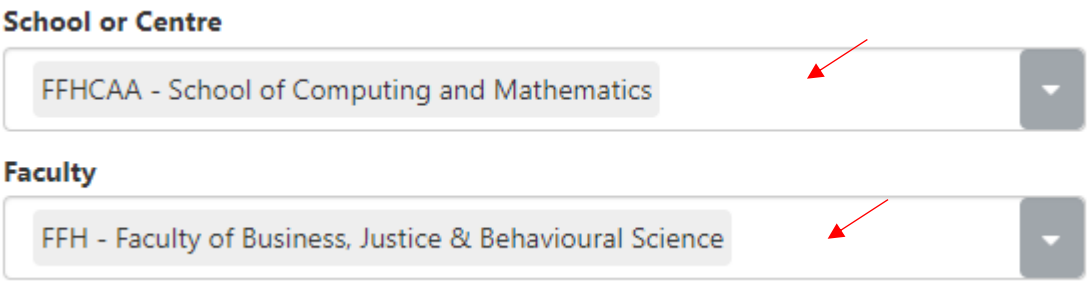


Select the correct Co-Investigator by clicking on the blue text in the Name column. The Investigator will then be listed as selected**. Press the Add Selected button** to bring the Co Investigator into your RPR Form.

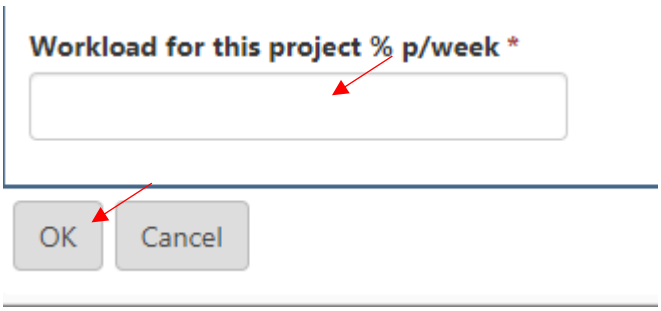


The **Co-Investigator Screen** will open.

Note: Check the School or Centre box and Faculty box to ensure you have selected the correct Co-Investigator. If the wrong person has been added press cancel to remove, and search again.



Enter workload details for this project % p/week. Select OK.



Once completed you will see the Co Investigator has been added to your RPR form.

To <u>add additional Co-Investigators</u> repeat the steps above.

Step 3 - Adding External Investigators

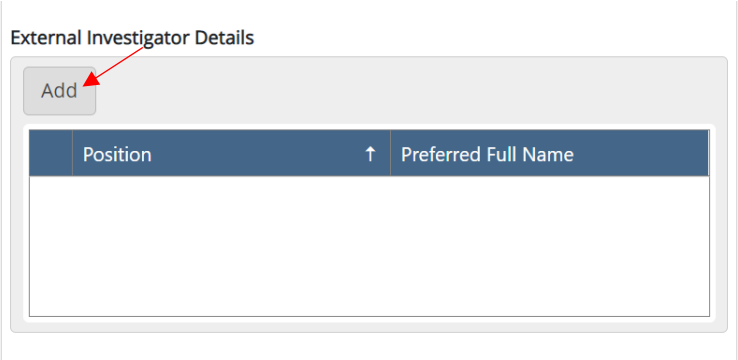
The University is required to report to various government departments on projects undertaken with external Australian and International organisations. For this purpose the RPR form is used to capture external investigator and organisation details.

In this section there are two actions to follow:

- Action 1 - searching for an existing external investigator,
- Action 2 - if one does not exist then you create a record for a new external investigator.

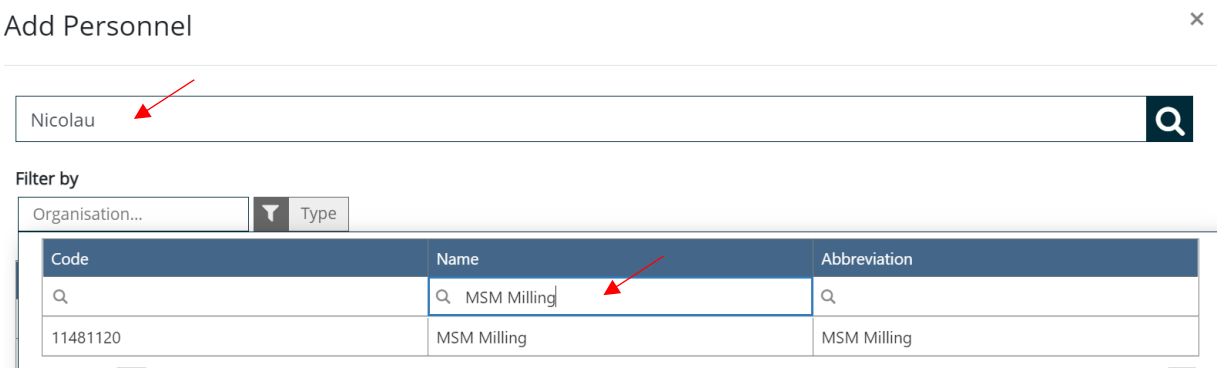
Action 1 - searching for an existing external investigator

Select Add under External Investigator Details



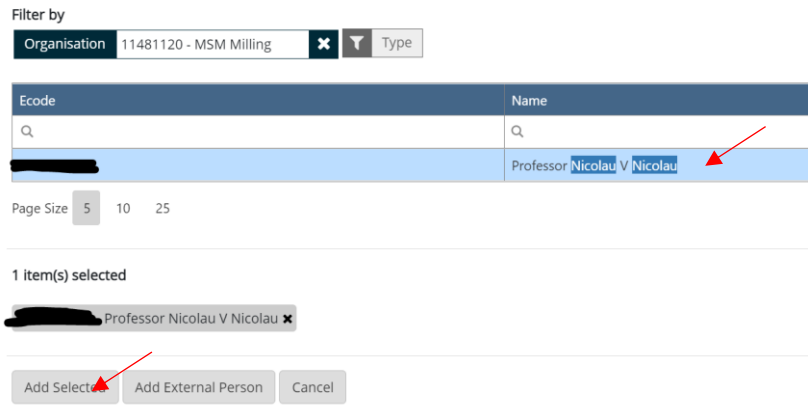
Use the Search Box and Filter by Organisation tools to find a person

You can type the name of your external investigator in the search box, then Select the Organisation filter and **type the organisation name in the Name column**



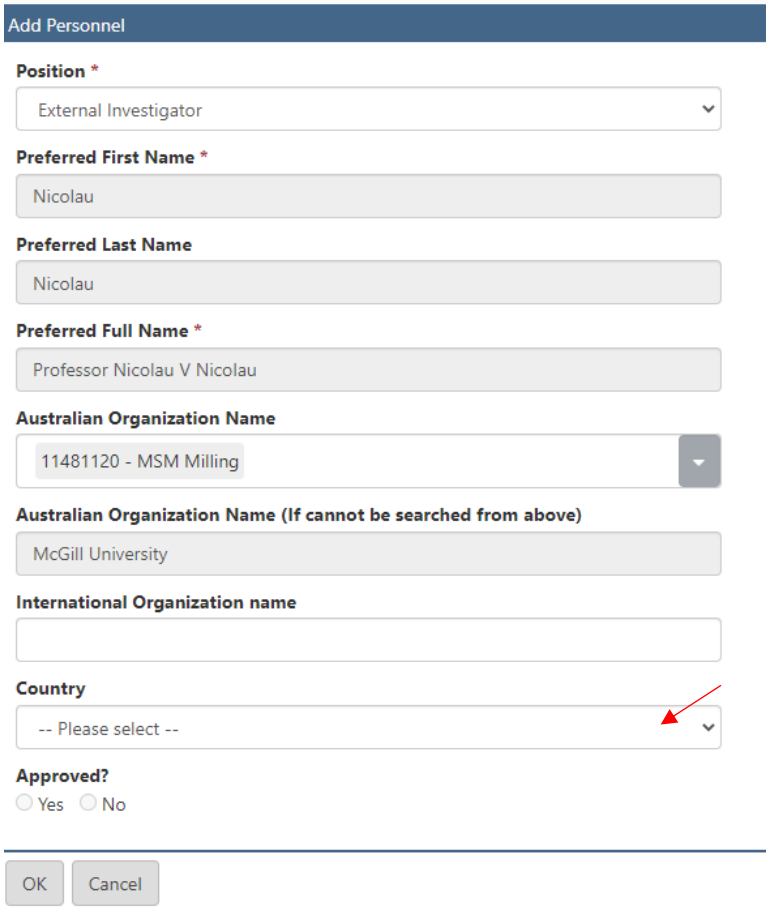
Using both the name search and organisation narrows down the search to check existing external investigators. Click the **name of the external investigator in the name column to select the correct person. The record will then appear as a blue highlight as per the example below.**

Click the **Add Selected** Button to add the external investigator to the record.



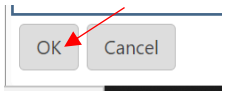
The organisation will be added and appear like the image below.

You need to use the drop down list under Country and click on the country of origin of the external investigator.



NOTE – the Yes / No buttons at the Approved? question do not need to be completed. Research Services validate the external investigators upon receipt of the RPR form.

Press the Ok button to update the external investigator record



When the above steps have been completed you will see the External Investigator added to the RPR form as per below.

External Investigator Details

Add

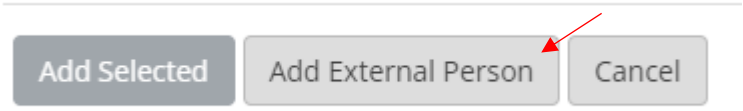
	Position	Preferred Full Name
	External Investigator	Professor Nicolau V Nicolau

Page Size 5 10 25

Page 1 of 1 (1 items)

Action 2 - only to be completed if existing external investigator needs to be created

Action 1 to be completed first to search for existing external investigator. If cannot be located select the Add External Person tab to create new external investigator record.



The External Investigator page will open to populate the information.

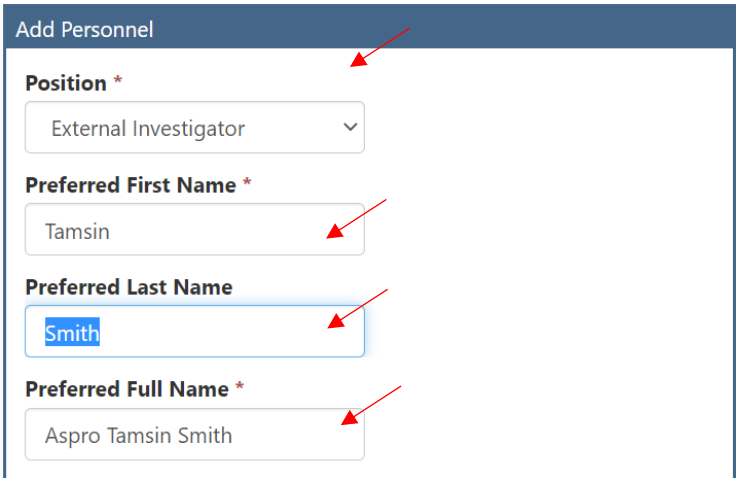
Select External Investigator under the Position heading

Enter the Preferred First Name

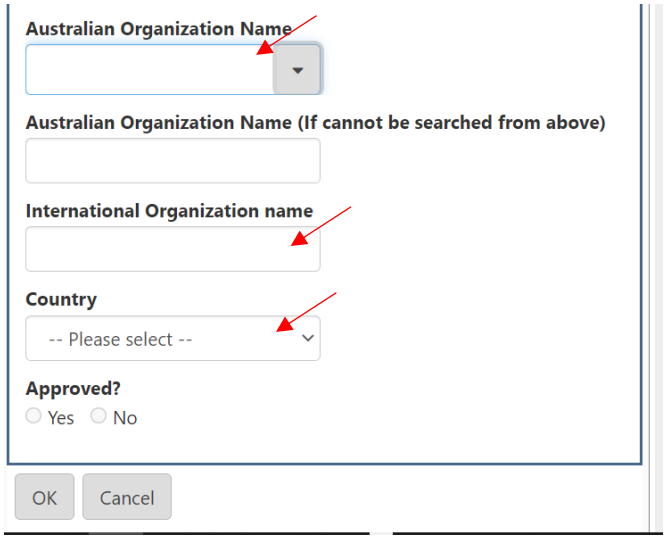
Enter the Preferred Last Name

The Preferred Full Name will auto-fill.

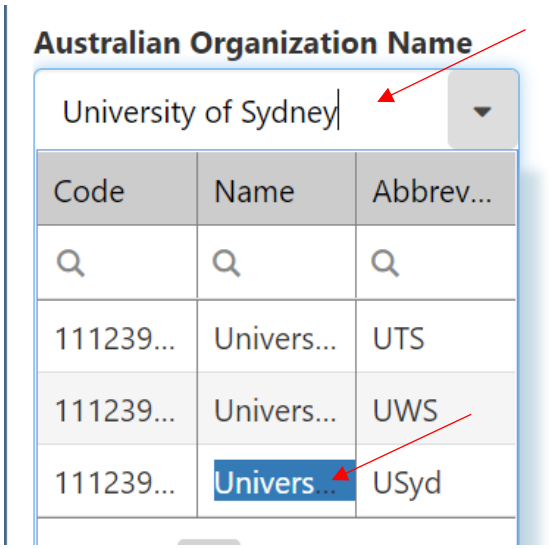
(See Screen shot below)

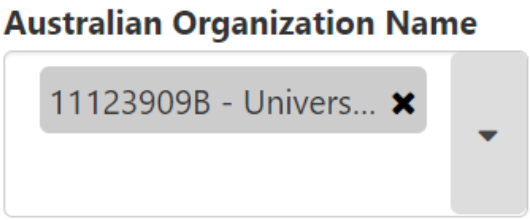


The Australian or International Organisation Name and Country need to be populated.



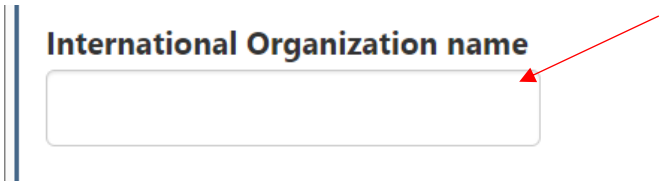
<u>For Australian Organisations</u> - type the name of the organisation in the search field. Click on the blue text to select the correct organisation.



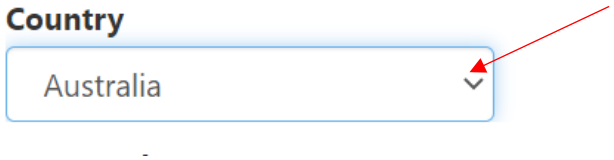


If the <u>Australian organisation cannot be located</u> in the list. Type the full organisation name directly into this text box.

For <u>International Organisations</u> – type the full organisation name directly into this text box.



Select the Country from the drop down list.



Select OK

NOTE – the Yes / No buttons at the Approved? question do not need to be completed. Research Services validate the external investigators upon receipt of the RPR form.

You can see the external investigators will appear like this. Note the + symbol indicates this is a new external investigator being added to the record.

External Investigator Details

Add

	Position	Preferred Full Name	N..	
	External Investigator	Aspro Terrence Smith		
	External Investigator	Professor Nicolau V Nicolau		

Note: Research Services will validate the external organisation details once the form is submitted for Research Services Review.

Adding Additional Personnel

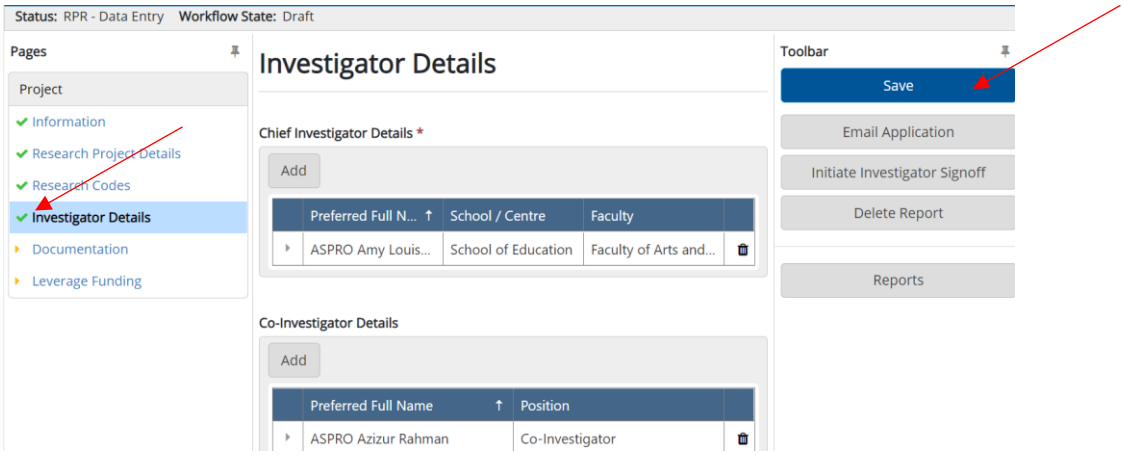
The RPR form has the following three additional personnel roles available which can be updated in the RM record once a pending application has made successful/funded.

The options available will be:

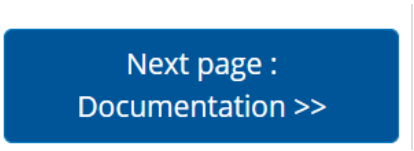
- **Project Administrator** – research assistant directly funded from this project or a direct appointment reporting to the lead CI for research administration support
- **Post Doc** – personnel appointment directly funded from this project
- **HDR Student** – HDR candidate directly funded from this project

These additional personnel are not added via the RPR form at approval stage. If your RPR moves to a funded successful project, the Chief Investigator can email research@csu.edu.au requesting additional personnel be added to the project record.

<u>Press Save</u> before moving to the next Menu Item. You will note the green tick now validates the section as completed.



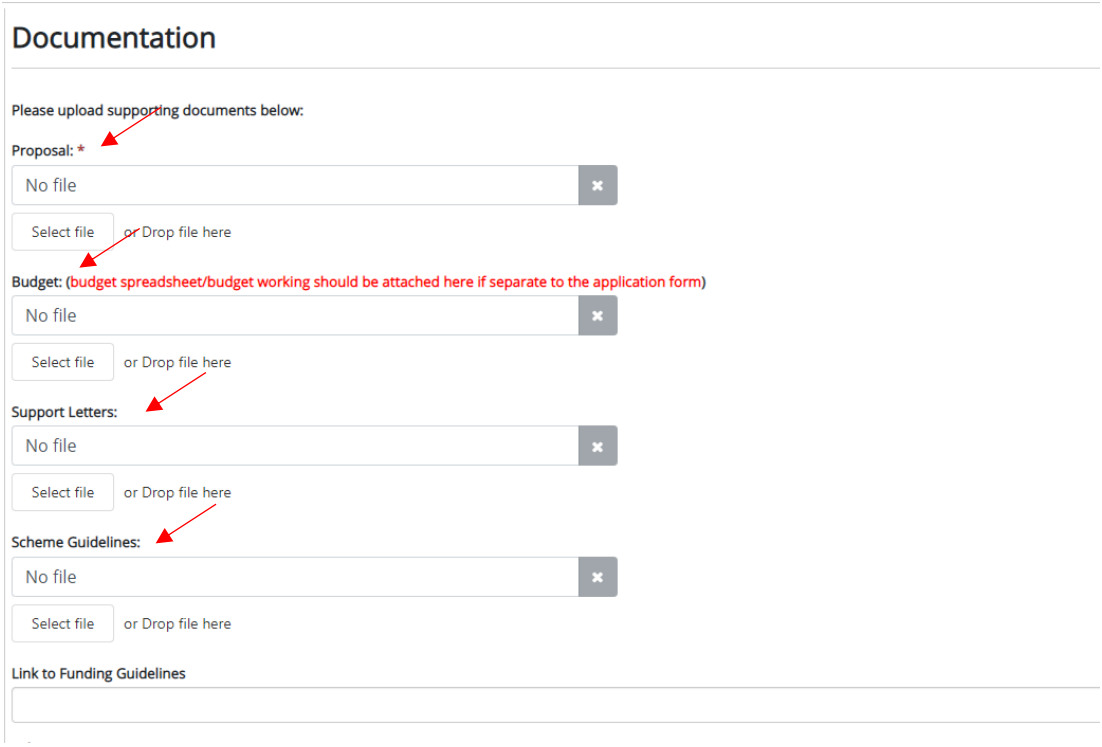
To move to Documentation – use the Next Page in the bottom right hand corner.



Documentation

In this section you need to upload all proposal, budget and supporting documentation. This includes:

- Proposal – the final draft version
- Budget – upload your draft BAF or budget spreadsheet to support any figures contained within the proposal
- Support Letters - either a draft CSU support letter or copies of support letters from project collaborators
- Scheme Guidelines – either upload the PDF of the scheme guidelines or provide a Web Link to the Funding Guidelines



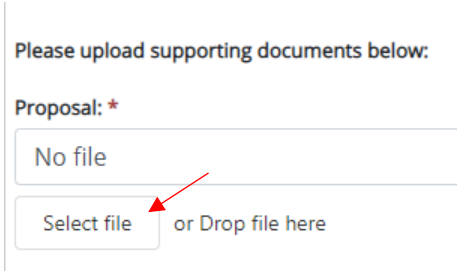
NOTE: Leverage confirmation is included within the next section.

Supporting Documentation marked with an * is mandatory to enable the application to proceed. Research Services will contact you if the documentation attached is insufficient.

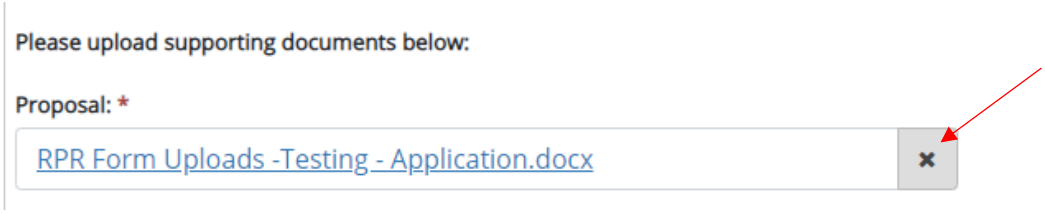
Documents can be added either by uploading 'Select File' or using the drag and drop functionality.

To upload a document under the relevant headings (Proposal, Budget, Support Letters, Scheme Guidelines)

Click the Select File button to access your document location.



Select the Document name from the saved location and Open. The document will then appear like this. If you need to **delete the attachment** – select the X to remove.



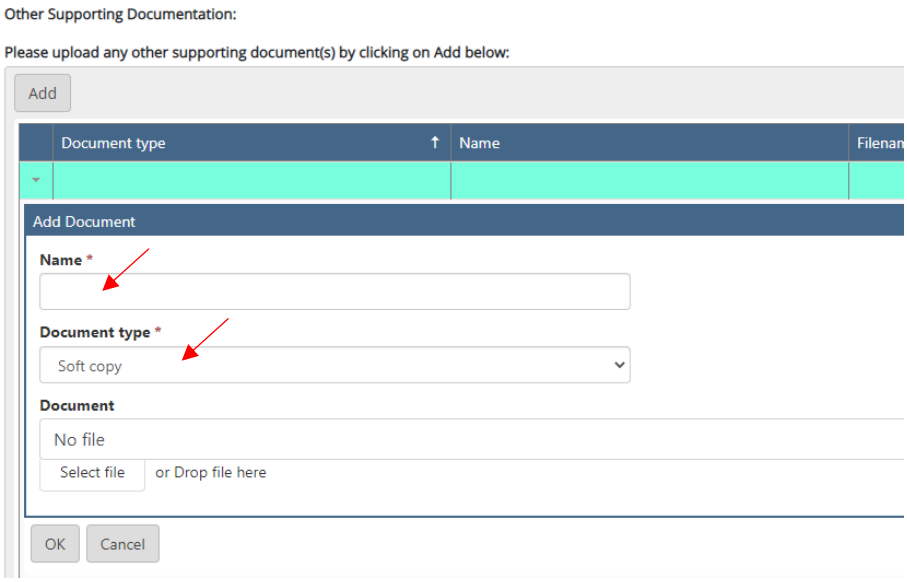
To add files using the Drag and Drop method highlight the document in the saved location you are wanting to upload. Click on the document and drag over the 'Drop file here' location and release the mouse.

Repeat steps against each document type to add all supporting documents to this form.

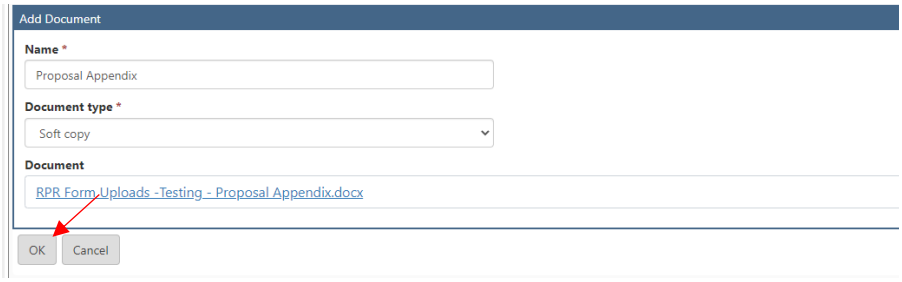
You can only add one document to each upload. Additional documents can be added under '**Other Supporting Documentation'.**

To add other supporting documentation – click the add button

Type the **name of document into the Name Field. Document Type** defaults to soft copy.



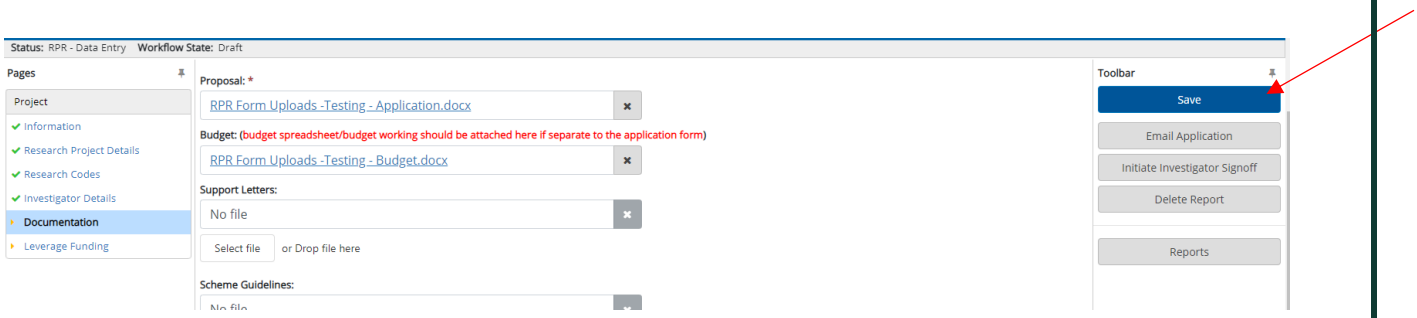
Repeat the upload or drag and drop method above to attach your additional documentation.



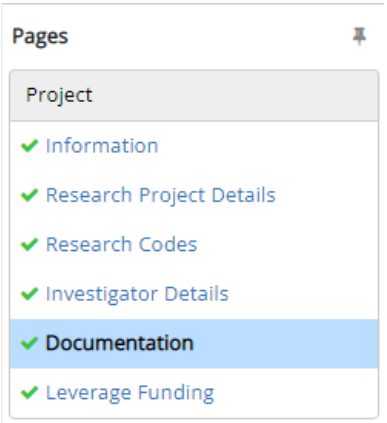
Select <u>OK to finalise the upload</u>.

Repeat these steps for each additional supporting document that needs to be uploaded.

<u>Press Save</u> before moving to the next Menu Item.



After pressing save you will note the Doucmentation tab is now validated with a green tick



To move to Leverage Funding – use the Next Page in the bottom right hand corner.

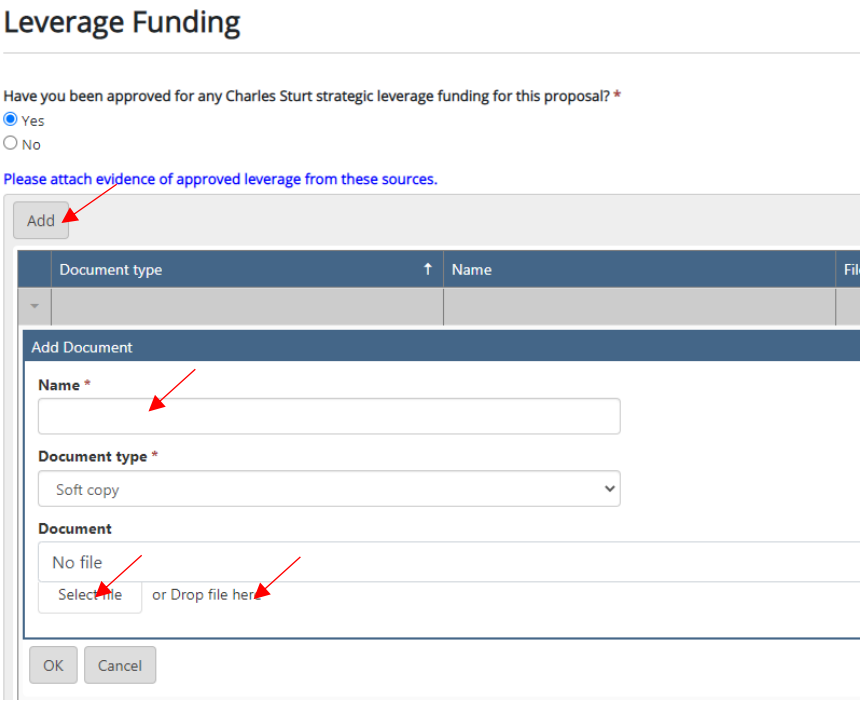
Leverage Funding

On this page you will be asked to **select Yes or No to the question**. Leverage funding is any funding Charles Sturt cash contribution committed to an external research project that supports project expenses over and above what is being requested from the Funding Organisation or through collaborator contributions.

Leverage funding is generally committed from University strategic funds or via the Faculty or Research Centre. You will need to make sure you have written evidence of any leverage committed to the project.

Click on the Yes button if you have obtained leverage funding to support your project.

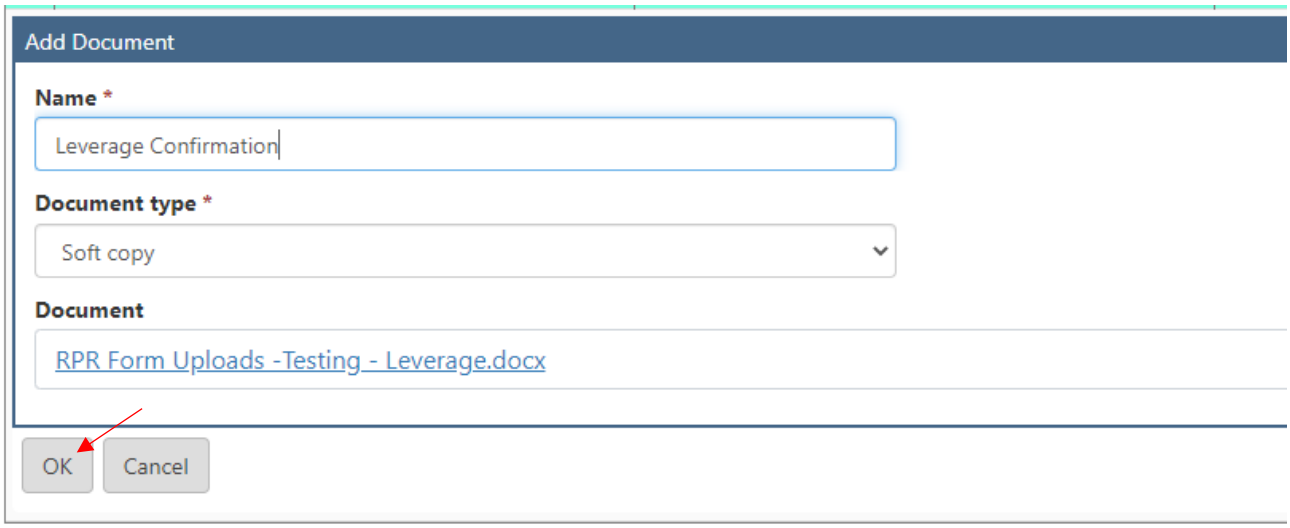
The Leverage Funding page will open like this and **you will be requested to attach evidence of approved leverage. This is usually an email from the funding source confirming the amount of funding and use.**



To attach evidence click the Add Button. Repeat the process (similar to uploading documentation).

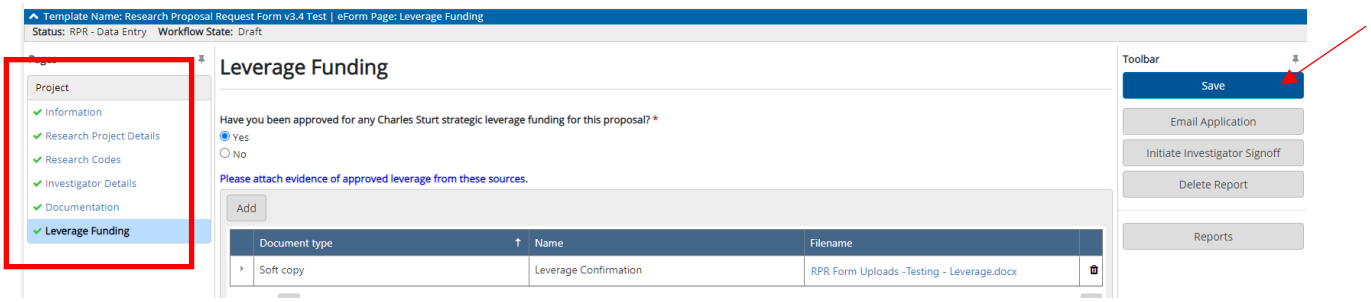
Type the document name. **<u>Either upload</u> by clicking on Select File <u>or Drag your file to the Drop File Here</u> heading and release.**

Click the OK button to finalise the upload.



Press Save. At this stage you will see all sections in the Pages menu are validated with a green tick.

The Chief Investigator should review the form and its content to ensure all information is correct.



To move backward through the form to review previous sections – use the Previous Page button in the bottom left hand corner of the page. **IMPORTANT NOTE –** if all fields are not showing a green tick – you will see a red ! indicating incomplete details. The form can not progress to Investigator Sign Off until the errors have been resolved.

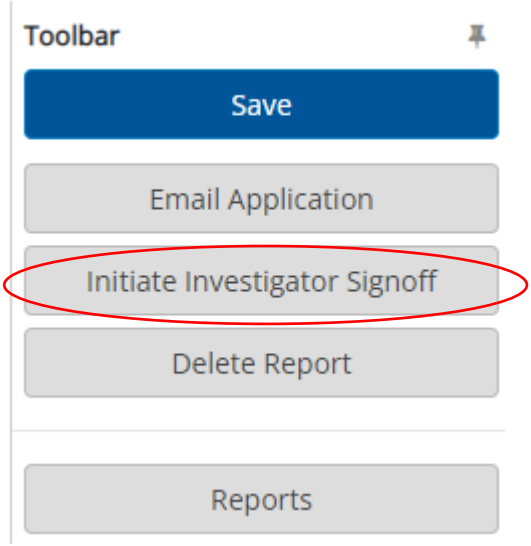
NEXT ACTION - The Form is now complete and the Chief Investigator needs to move the form to Investigator Sign-Off – see Section 4.

WORKFLOW STATUS - Project Request Status: **RPR - Data Entry** Workflow State: **Draft**

4. Initiating Investigator Sign-Off (action required by the Chief Investigator)

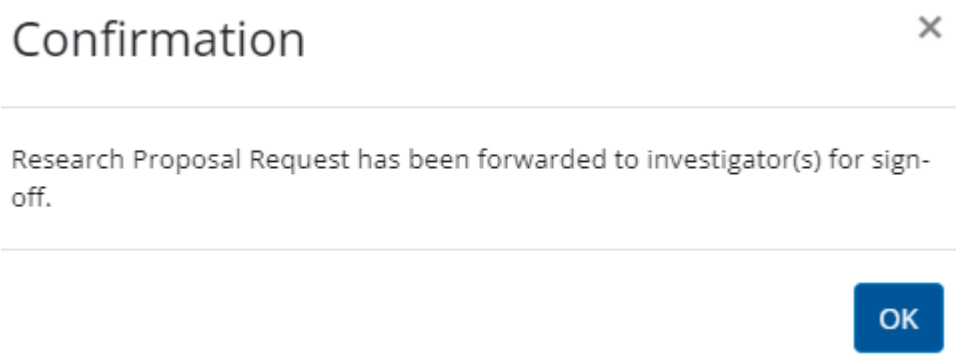
This action can be completed by the Chief Investigator once they are satisfied the form is ready to be sent to other project investigators.

Click the **Initiate Investigator Signoff** button on the right hand tool bar menu.



Onscreen prompts will appear - Select Ok.

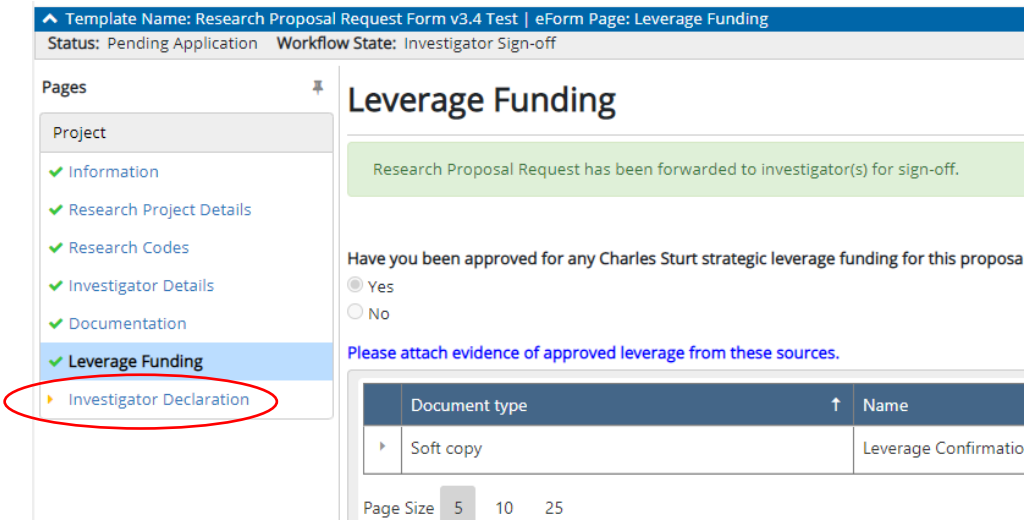
An on screen confirmation box will appear – confirming the Research Proposal Request has been forwarded to investigator(s) for sign-off. **Select Ok** to clear this box.



When the form is sent for Investigator Sign-Off - you will **note the onscreen updates to the form's status and message bar indicating the form has been sent for Investigator Sign Off and the change in Workflow state**.

An email will be sent to each Charles Sturt Investigator requesting they add their Approver (Supervisor who can endorse their participation in the project) and sign the Investigator Declaration.

You will now see an Investigator Declaration page in the left hand Page's Tool Bar.



Review Section 5 – Adding your Approver <u>and then completing</u> the Investigator Declaration

NEXT ACTION - The RPR is now ready for <u>all</u> Investigator's to:

(1) Add their Approver and then

(2) Complete their Investigator Sign-Off. **(Must be in this order only)**

WORKFLOW STATUS - Project Request Status: **Pending Application** Workflow State: **Investigator Sign-off**

5. Adding your Approver and Completing the Investigator Declaration (action required by all CSU investigators)

All Investigators (Chief Investigators and Co-Investigators) listed on the RPR form will receive an email inviting them to access the RPR form, preview its content, add their Approver and sign their Investigator Declaration.

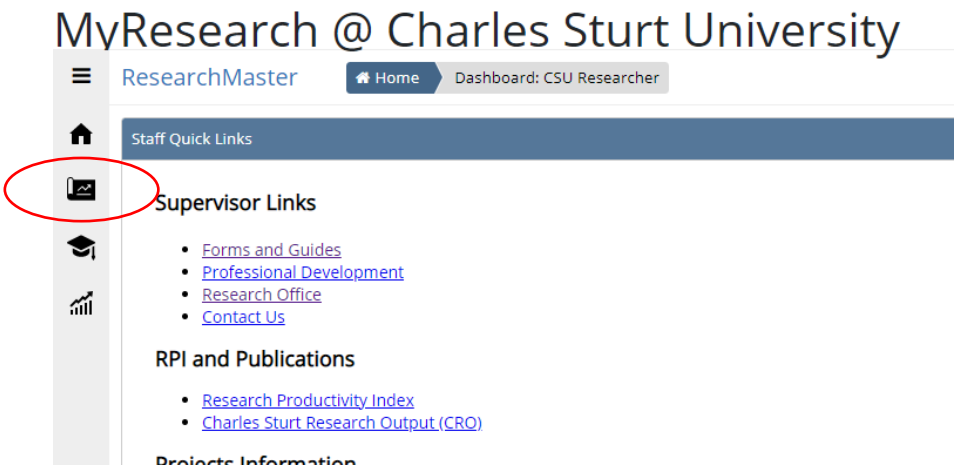
An 'Approver' is the immediate Supervisor who can sign-off on the Investigator's involvement in the research project. In most part this is the Head of School / line manager.

To access the RPR form

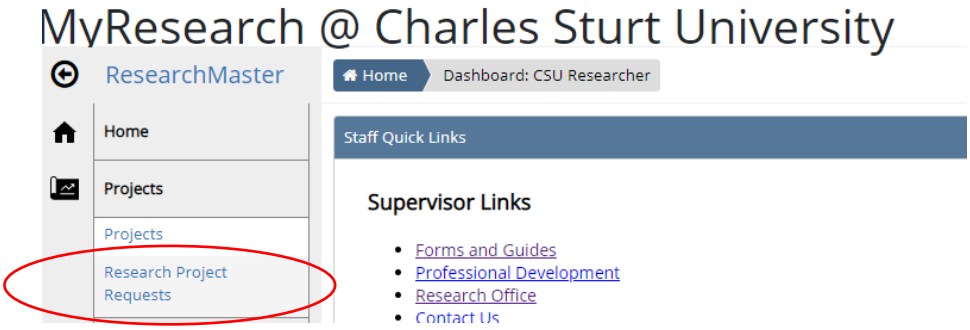
Login to Research Master https://myresearch.csu.edu.au/RME

Enter your Charles Sturt user name and password.

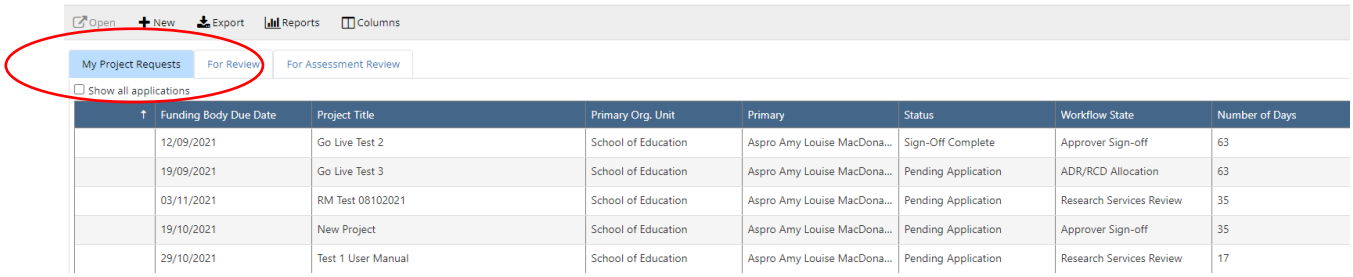
Locate the **Projects Icon** on the left hand side menu and **click the icon to open the menu**



Click the blue hyperlink word – **Research Project Requests -** from the Projects Menu



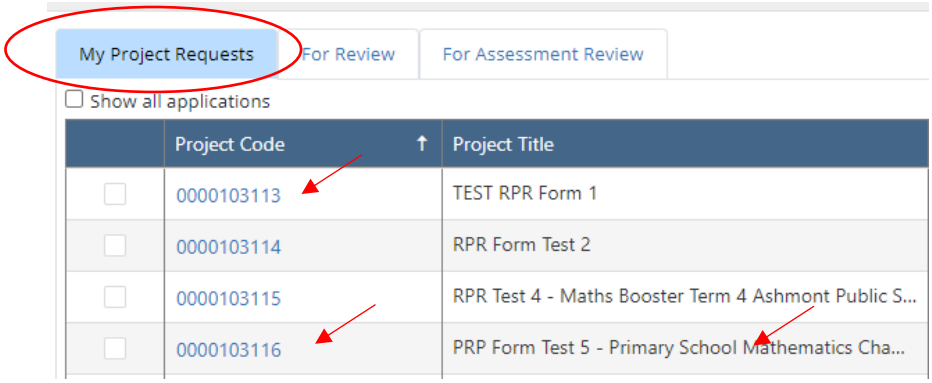
The screen will open and display **a list of Research Project Requests you are named on under the My Project Requests** tab. Review the Project Code and Project Title columns to ensure you are selecting the correct form. **See example below of the RPR form dashboard and locate the Projects Tab.**



	Funding Body Due Date	Project Title	Primary Org. Unit	Primary	Status	Workflow State	Number of Days
	12/09/2021	Go Live Test 2	School of Education	Aspro Amy Louise MacDona...	Sign-Off Complete	Approver Sign-off	63
	19/09/2021	Go Live Test 3	School of Education	Aspro Amy Louise MacDona...	Pending Application	ADR/RCD Allocation	63
	03/11/2021	RM Test 08102021	School of Education	Aspro Amy Louise MacDona...	Pending Application	Research Services Review	35
	19/10/2021	New Project	School of Education	Aspro Amy Louise MacDona...	Pending Application	Approver Sign-off	35
	29/10/2021	Test 1 User Manual	School of Education	Aspro Amy Louise MacDona...	Pending Application	Research Services Review	17

You will note in the Primary column the name of the project Chief Investigator. For any project you are listed on as a Chief or Co Investigator that RPR form will appear in your RPR form dashboard under the My Project Requests tab when you log in.

To open an RPR record - Select the correct Project Code by clicking on the blue text in the **Project Code column**. The form will open in a new window.

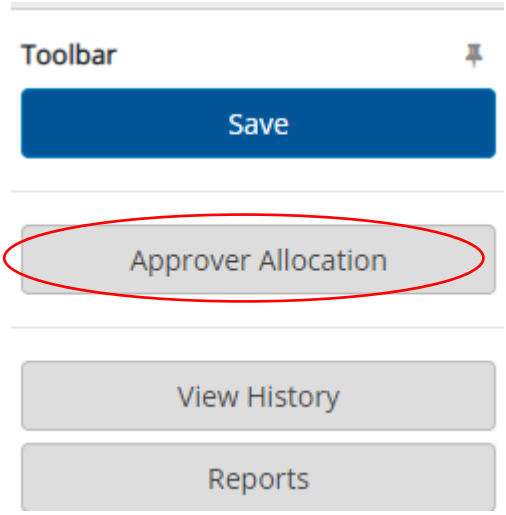


	Project Code	Project Title
	0000103113	TEST RPR Form 1
	0000103114	RPR Form Test 2
	0000103115	RPR Test 4 - Maths Booster Term 4 Ashmont Public S...
	0000103116	PRP Form Test 5 - Primary School Mathematics Cha...

NOTE – It is extremely crucial for the workflow of the RPR form for you to ensure you have followed these instructions carefully and **added your Approver to the Form**. This action enables the RPR form to be received by your Approver for action.

Step 1 - Add your approver

Click the **Approver Allocation** button in the right hand Toolbar.



(Note: Toolbar may look a little different when you log in to the RPR form depending in what role you hold in the project).

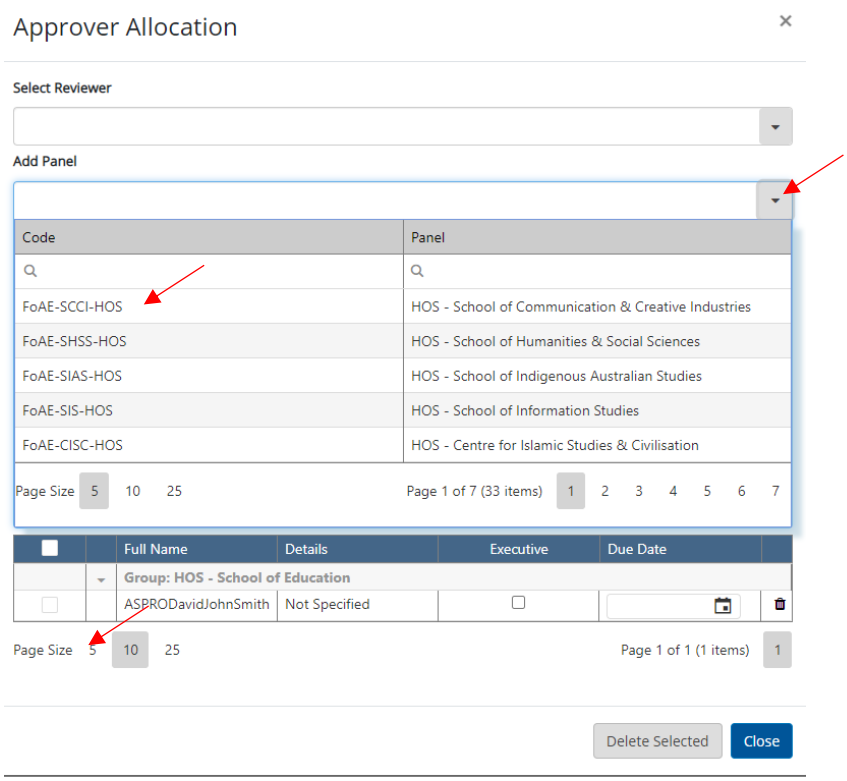
Click the drop down list under Add Panel. A list will display.

This list contains role – for example – HOS (Head of School), ADR (Associate Dean Research), ED (Executive Dean), RCD (Research Centre Director). You will need to find your appropriate role person in the list for example FOAE-SIAS-HOS from the panel drop down list – this will be the role who can sign off on your involvement in this project.

To select your approver click on the Panel member either in the Code or Panel columns – this automatically adds them to the record.

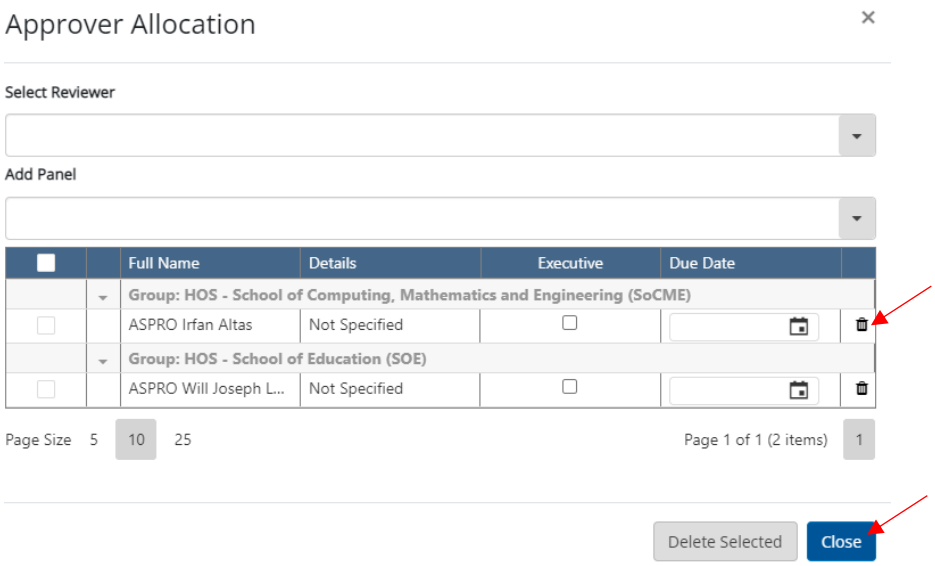
You can use the Page Size Icons at the bottom left of the Panel listing to increase the size of the list you can view in full, and the Page function in the bottom right to move through the list.

The below example displays the steps mentioned above.



Once you have selected the Approver they will be automatically added to the Approver Allocation List as per example below. You just need to select close at this stage.

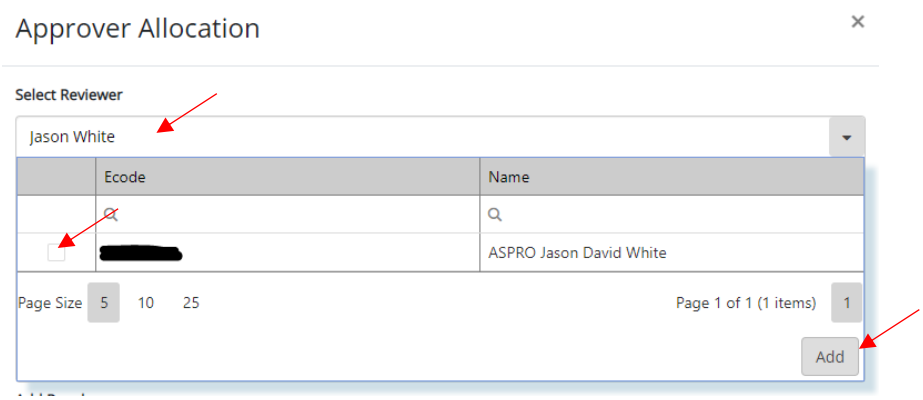
If you need to remove the approver use this bin icon to delete.



Note: If your Approver does not appear in the Panel List you need to search for the person in the Select Reviewer function.

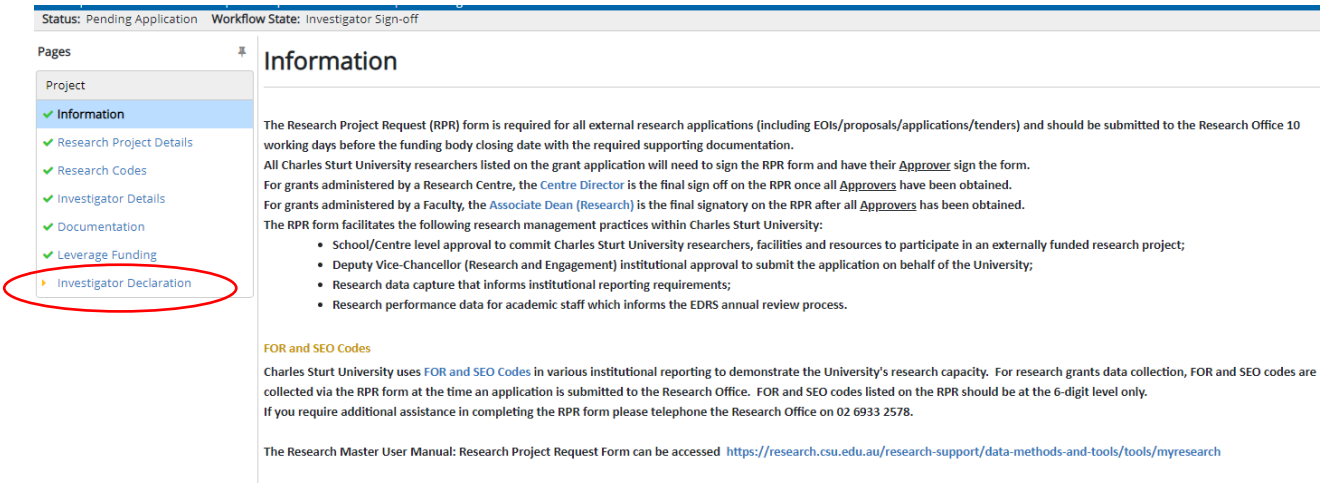
Type the name of your Approver in the Select Reviewer box. A list of people will appear.

Click the check box next to the eCode column to highlight your approver. Then click the Add button.

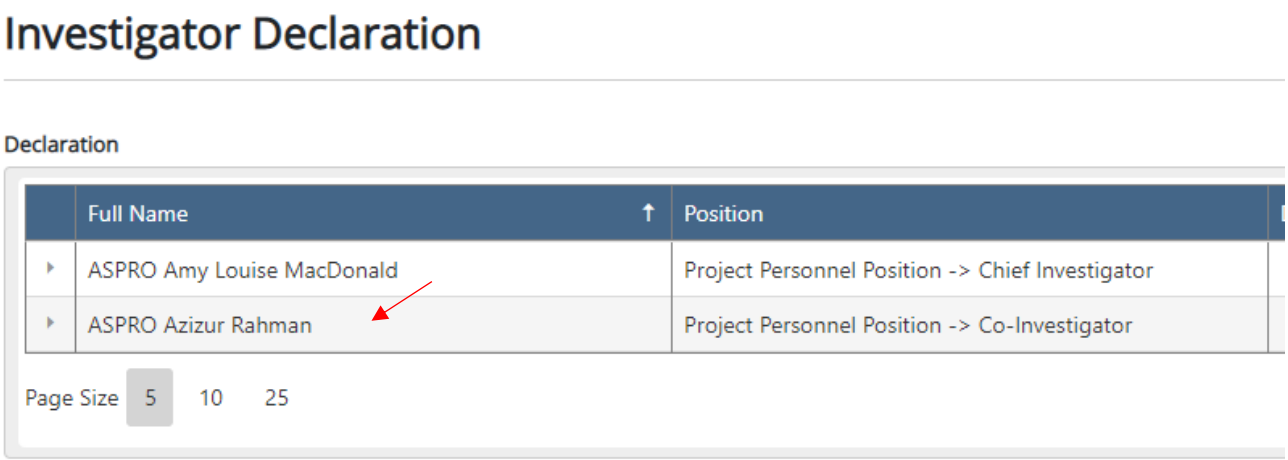


Step 2 - complete your Investigator Declaration

Click on the Investigator Declaration heading located in the Pages Tool Bar on the left hand side of the page.

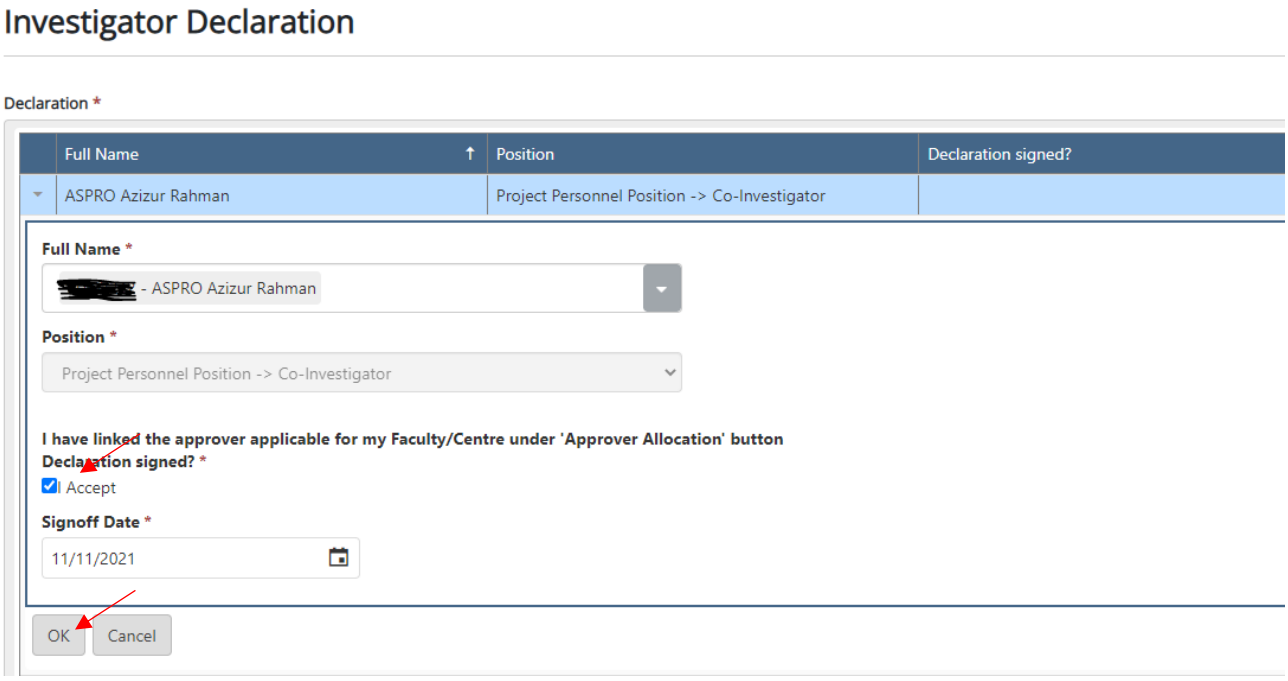


Click on your name from the available list under the Declaration page



Tick the I Accept box – I have linked the approver for my Faculty / Centre under Approver Allocation button Declaration signed?

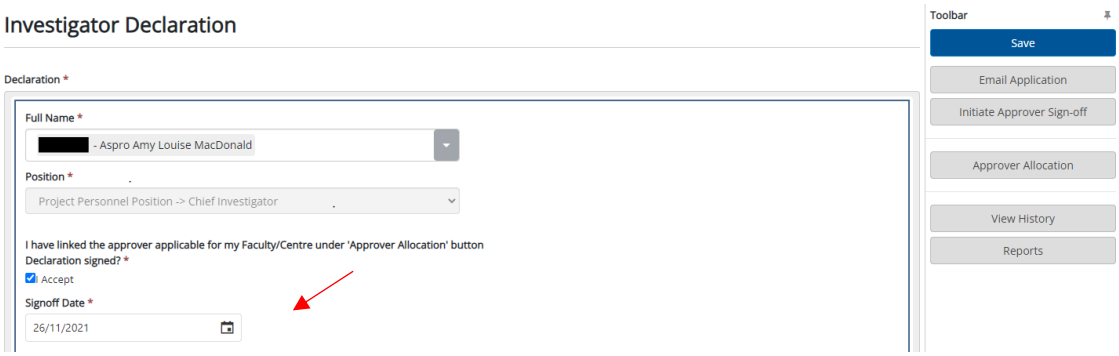
A date field will then appear. **Click Ok to finalise.**



Press the Save Button on the right hand tool bar

Once each Investigator has accepted their declaration, you will then see an **updated listing with a tick indicating who has completed the declaration**.

Example – RPR single investigator only



Example – two or multiple investigators have signed

The Investigator Declaration page will validate with a green tick in the left hand Pages Menu once you have completed your declaration and added your Approver.

A tick will validate Declaration Signed when all Investigators have signed their Declaration and added their Approver. The Chief Investigator can initiate Approver Sign-Off – See Section 6.

Investigator Declaration

Declaration

	Full Name	Position	Declaration signed?
	ASPRO Amy Louise MacDonald	Project Personnel Position -> Chief Investigator	✔
	ASPRO Azizur Rahman	Project Personnel Position -> Co-Investigator	✔

ACTION - The RPR is now ready for the Chief Investigator to Initiate Approver Sign-Off.

WORKFLOW STATUS - Project Request Status: **Pending Application** Workflow State: **Investigator Sign-off**

6. Initiating Approver Sign-Off (action required by the Chief Investigator)

The Chief Investigator is required to initiate Approver Sign Off – this can only occur once all investigators have allocated their approvers and completed their declaration.

The Declaration page will show all investigators have completed their declaration when a tick appears next to each investigator in the Declaration signed column.

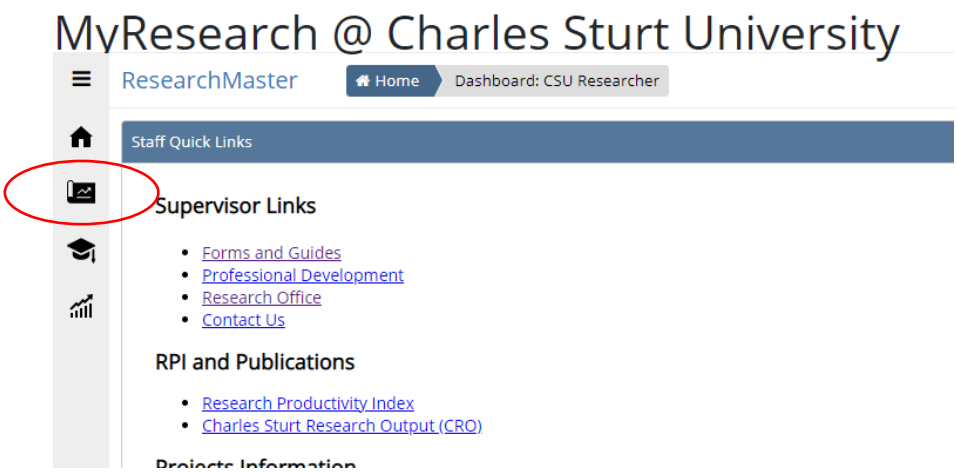
To initiate <u>Approver sign off</u> the Chief Investigators needs to do the following steps.

<u>Access the RPR form</u>

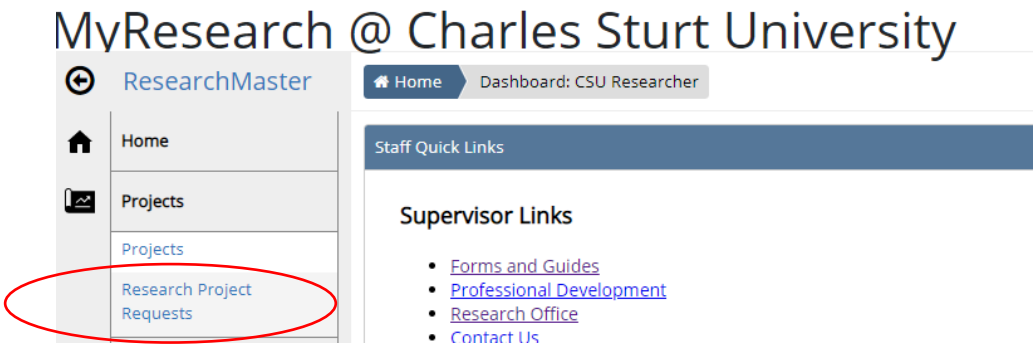
Login to Research Master https://myresearch.csu.edu.au/RME

Enter your Charles Sturt username and password.

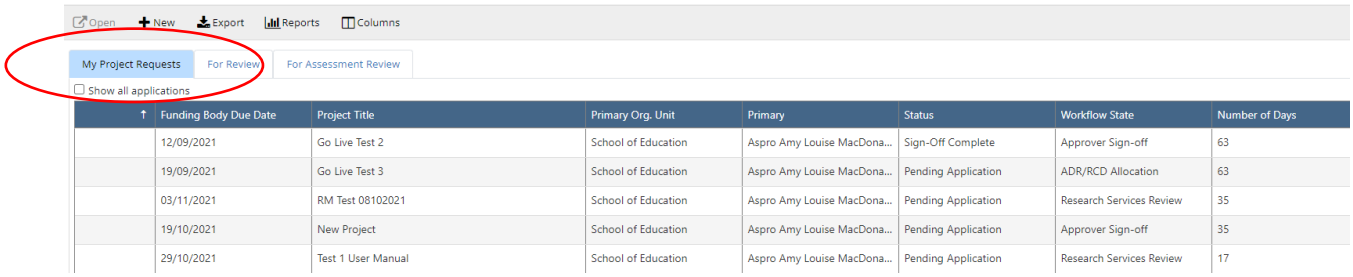
Locate the **Projects Icon** on the left hand side menu and click the icon to open the menu



Select – **Research Project Requests** Form from the Projects Menu



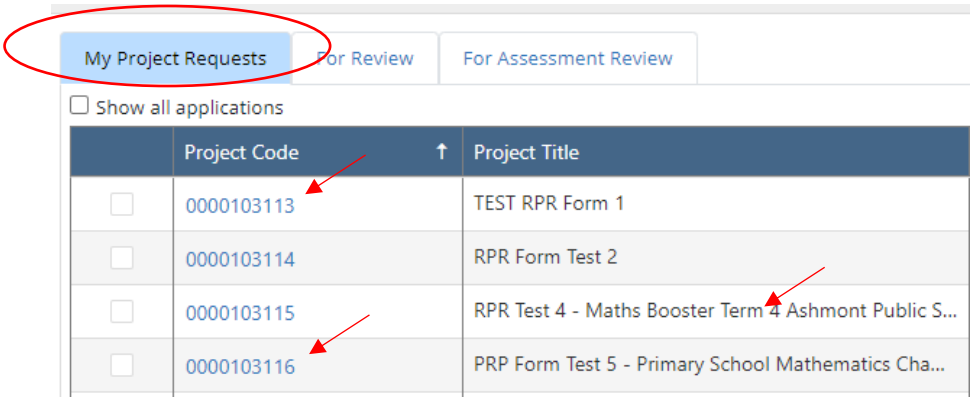
The screen will open and display **a list of Research Project Requests you are named on under the My Project Requests** tab. Review the Project Code and Project Title columns to ensure you are selecting the correct form. **See example below of the RPR form dashboard and locate the Projects Tab.**



	Funding Body Due Date	Project Title	Primary Org. Unit	Primary	Status	Workflow State	Number of Days
	12/09/2021	Go Live Test 2	School of Education	Aspro Amy Louise MacDona...	Sign-Off Complete	Approver Sign-off	63
	19/09/2021	Go Live Test 3	School of Education	Aspro Amy Louise MacDona...	Pending Application	ADR/RCD Allocation	63
	03/11/2021	RM Test 08102021	School of Education	Aspro Amy Louise MacDona...	Pending Application	Research Services Review	35
	19/10/2021	New Project	School of Education	Aspro Amy Louise MacDona...	Pending Application	Approver Sign-off	35
	29/10/2021	Test 1 User Manual	School of Education	Aspro Amy Louise MacDona...	Pending Application	Research Services Review	17

You will note in the Primary column the name of the project Chief Investigator. For any project you are listed on as a Chief or Co Investigator that RPR form will appear in your RPR form dashboard under the My Project Requests tab when you log in.

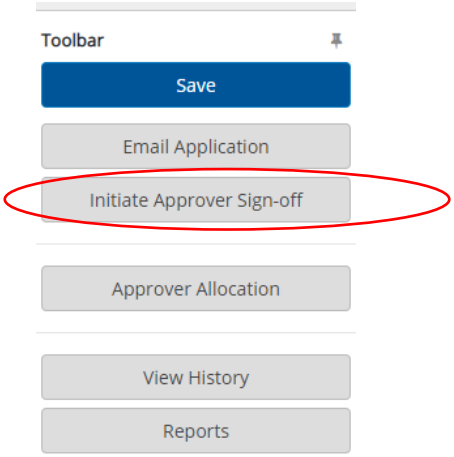
Select the correct RPR form by clicking on the blue text in the **Project Code column**. The form will open in a new window.



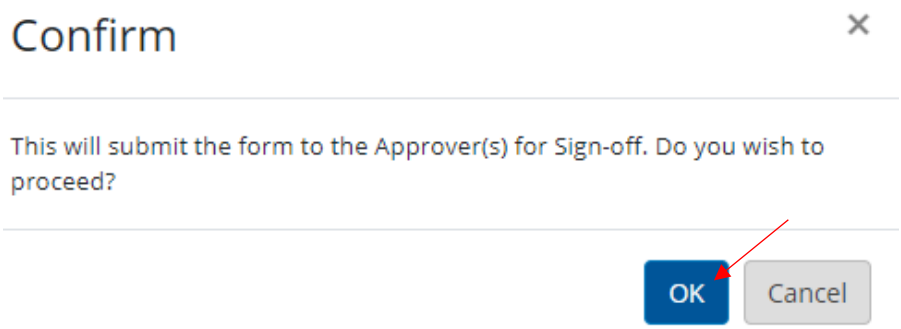
	Project Code	Project Title
	0000103113	TEST RPR Form 1
	0000103114	RPR Form Test 2
	0000103115	RPR Test 4 - Maths Booster Term 4 Ashmont Public S...
	0000103116	PRP Form Test 5 - Primary School Mathematics Cha...

To initiate Approver Sign-Off

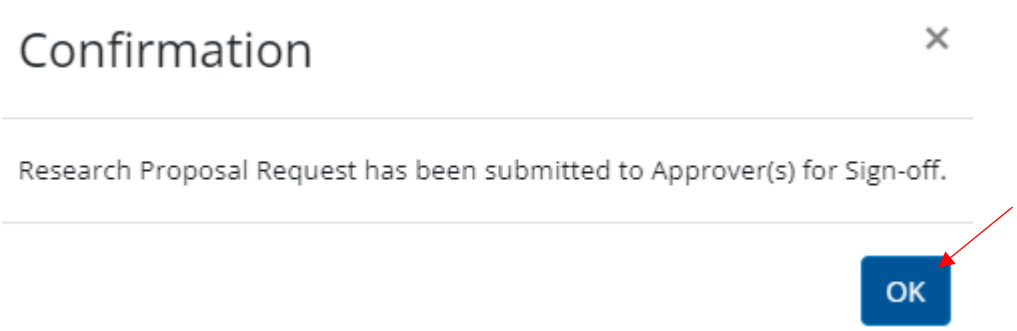
Click the **Initiate Approver Sign-Off** located in the right hand Toolbar.



Note on Screen Message – **Select OK**

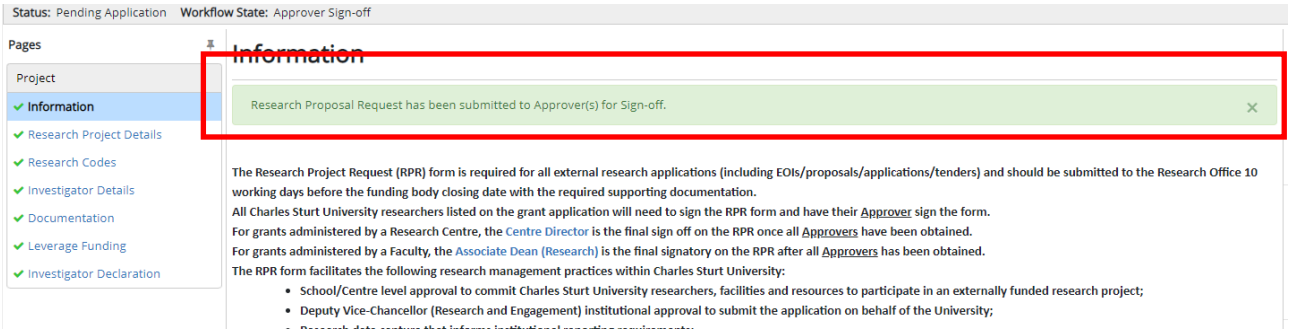


An onscreen Confirmation Box will appear – Research Proposal Request has been submitted to Approver(s) for Sign-off. **Select OK.**



IMPORTANT NOTE - Be aware of error messages which block the form moving to Initiate Approver Sign-Off. Any messages will appear as on screen status updates – error message usually appear with pink highlight.

This status update indicates the RPR has been submitted to Approver for Sign-Off.



The Chief Investigator can now logout.

NEXT ACTION - The RPR is now ready for Approver Sign-Off. All Approvers will receive an email requesting they sign the RPR form.

WORKFLOW STATUS - Project Request Status: **Pending Application** Workflow State: **Approver Sign-off.**

7. Information for Approvers

The role of 'Approver' in the RPR Form is allocated to the immediate line managers (supervisors) who have delegation to endorse their researcher's involvement in the proposed research project.

All allocated approvers for each Investigator listed on the RPR form will receive an email inviting them to access the RPR form, preview its content, and approve the involvement of their named Investigator.

An Approvers acceptance of the RPR form confirms approval of the following:

- the researcher's time commitment within the proposal;
- the researcher's capacity to undertake the project within their research workload allocation;
- any funding / or in-kind resources committed from the School's budget to support the project;
- for the administering organisation unit (School or Research Centre) to accept administration of this project, noting the project is viable within the administering unit's resources, personnel and funding requested to support the project is appropriate, as well as sufficient office space and infrastructure availability to support the project.

8. Completing the Approver Sign-Off

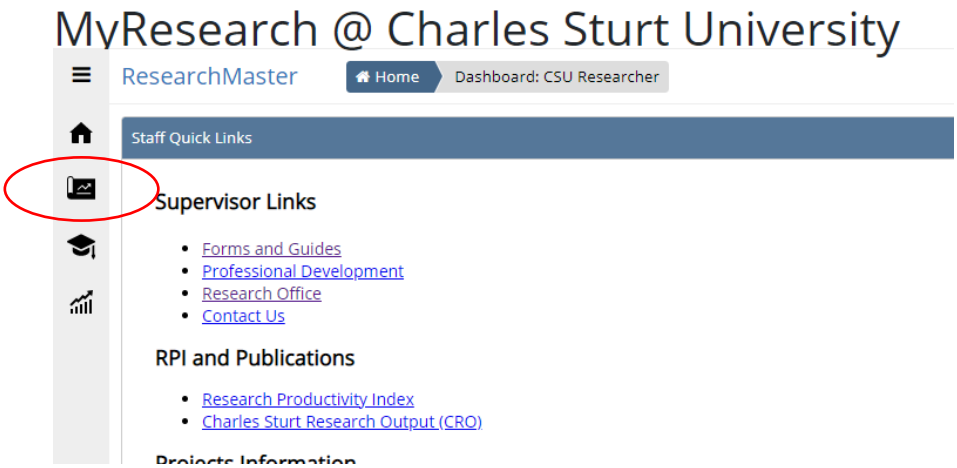
All Approvers listed on the RPR form will receive an email inviting them to access the RPR form, preview its content, and approve the involvement of their named Investigator.

To access the RPR form

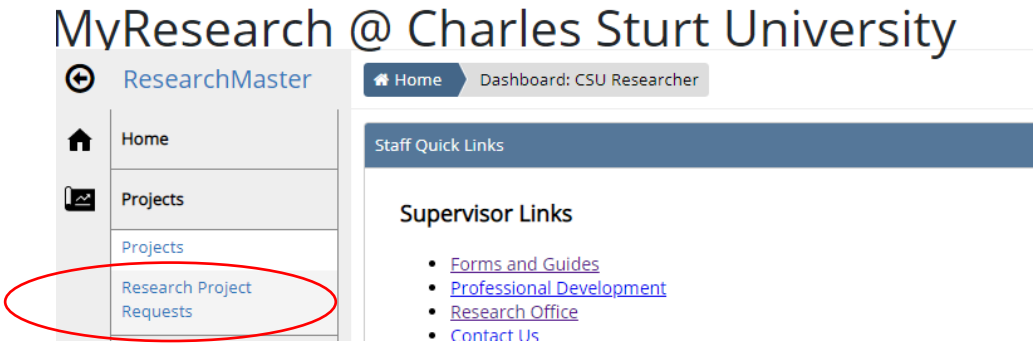
Login to Research Master https://myresearch.csu.edu.au/RME

Enter your Charles Sturt username and password.

Locate the **Projects Icon** on the left hand side menu and click the icon to open the menu

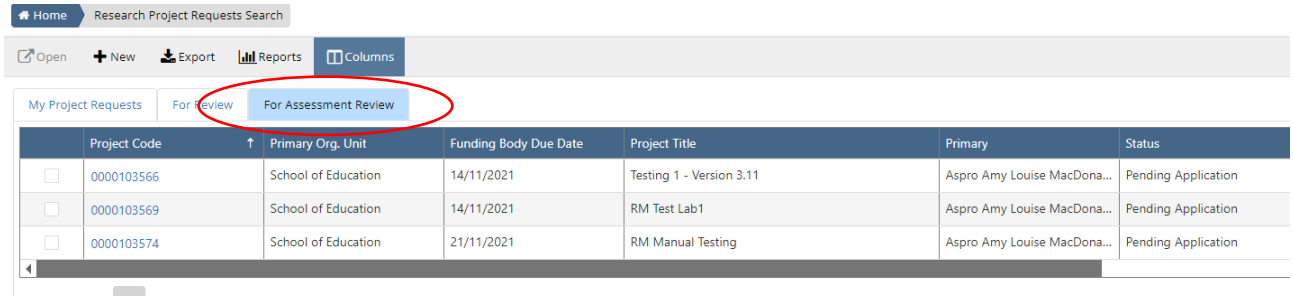


Select – **Research Project Requests** Form from the Projects Menu



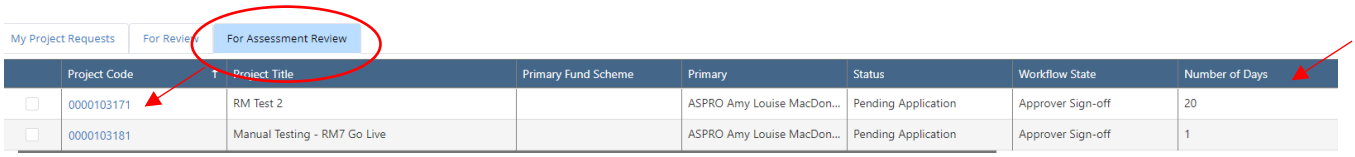
The screen will open to the RPR dashboard page – **Click on the For Assessment Review** tab to see a **list of Research Project Requests under your delegation that require Approver Sign off.**

See example below.

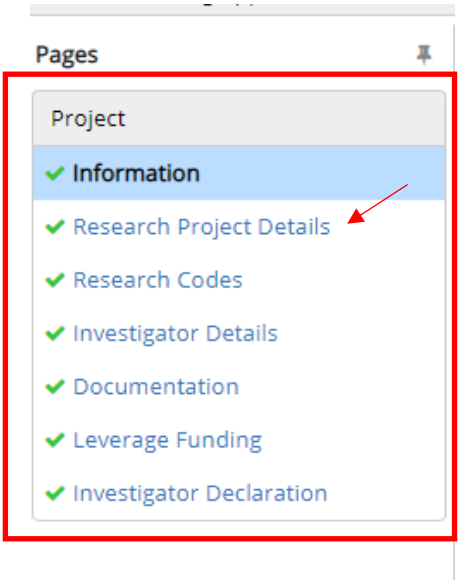


Review the Project Code and Project Title columns to ensure you are selecting the correct form. If you use the scroll bar to move the columns in the grid left to right, you will notice the Number of Days column – this indicates how long the RPR form has been awaiting your action.

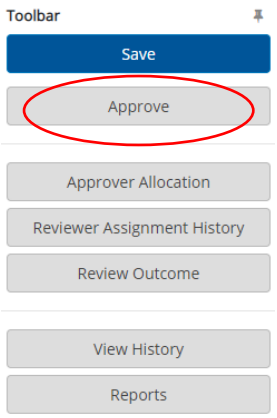
To select the correct RPR form click on the blue text in the **Project Code column**. The form will open in a new window.



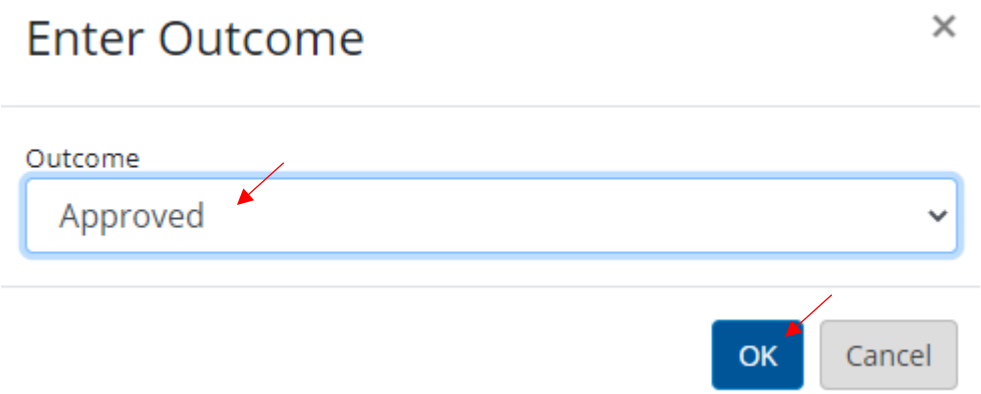
To review the project details use the Pages Menu on the left hand side. Move through the pages by clicking on each blue heading. The green ticks indicate the information on each page is complete.



To approve the RPR form click **Approve** tab in the right hand Toolbar menu

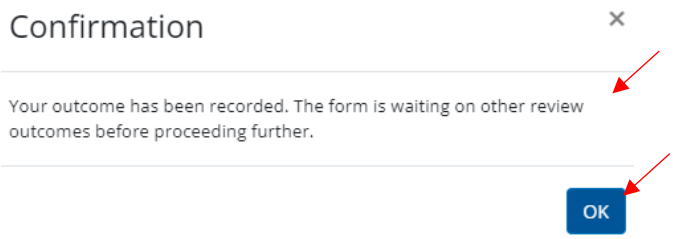


In the Enter Outcome box select **Approved from the drop-down menu, then OK**.

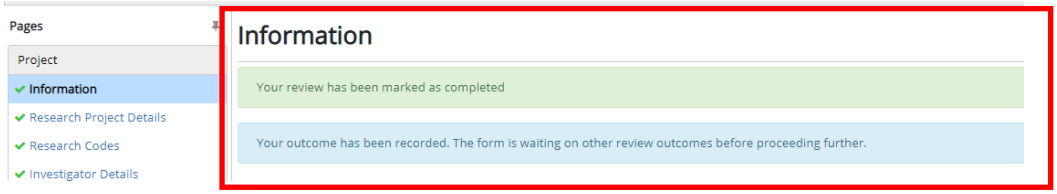


***** NOTE:** Approvers who have concerns with any of the content of the RPR form should contact the Investigator reporting directly to them, or the project Chief Investigator to seek clarification. This should be done via email or telephone outside the RPR form.

An onscreen confirmation box will appear – Your outcome has been recorded. The form is waiting on other review outcomes before proceeding further. **Select OK** to clear the confirmation box.

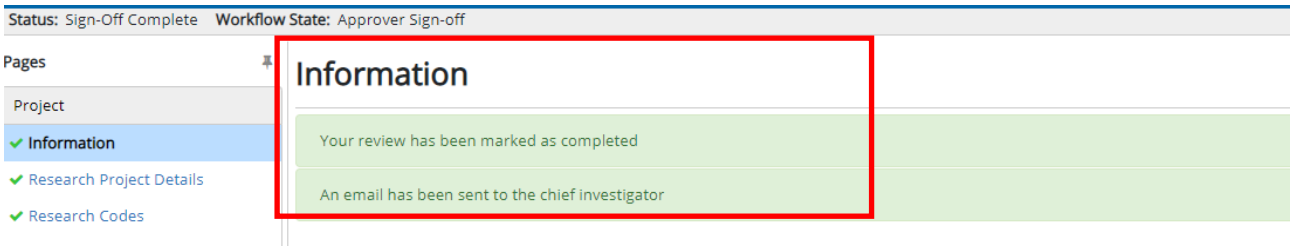


Completed approvals will be displayed in the message bar as per below.

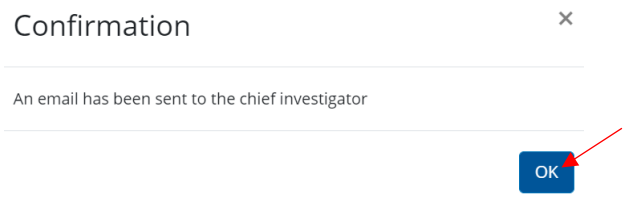


When all APPROVERS have signed the RPR form the following changes will appear on screen.

Message Bar – **email sent to the Chief Investigator to advise review has been completed**.



An on screen message box will appear **– click Ok.**



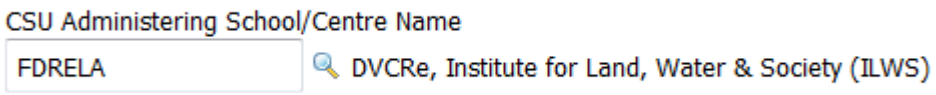
ACTION - The RPR is now ready for the Chief Investigator to initiate – ADR or RCD Sign-Off.

WORKFLOW STATUS - Project Request Status: **Sign-off Complete** Workflow State: **Approver Sign-off.**

9. Initiating ADR / RCD Review (action required by the Chief Investigator)

This section can only be undertaken once all Approvers have signed the form.

The **ADR or RCD allocated to approve this RPR** form is determined by the CSU Administering School or Research Centre allocated at Project Details. **For example in the image below** ILWS is allocated on the form as the Administering School / Center – this is a Research Centre, therefore the Research Centre Director will receive an email to approve the RPR form.



Note: only one ADR or RCD will receive an email inviting them to access the RPR form, preview its content, and add their approval to the form. Where a project is administered via a Research Centre the ADR is not required to sign the RPR form.

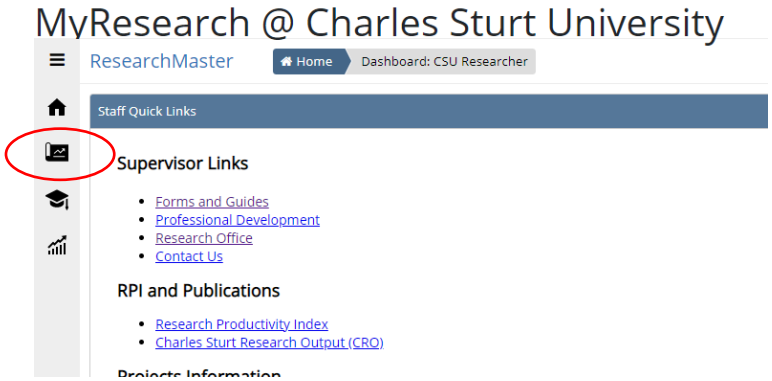
Complete the following steps to initiate the ADR / RCD Review

Access the RPR form

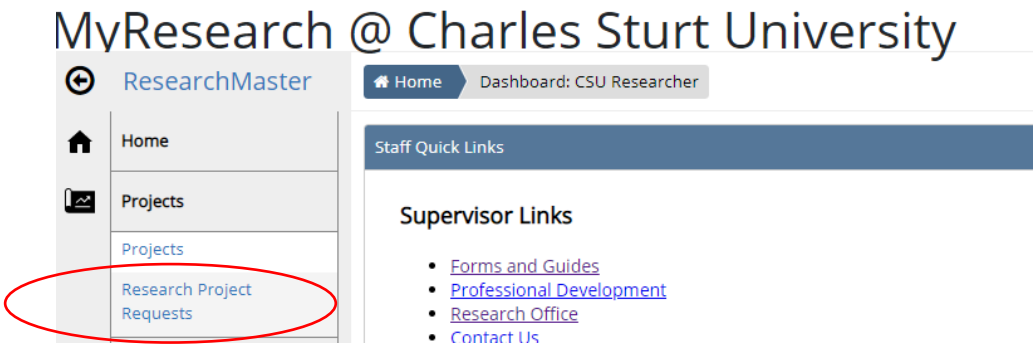
Log in to Research Master https://myresearch.csu.edu.au/RME

Enter your Charles Sturt username and password.

Locate the **Projects Icon** on the left hand side menu and click the icon to open the menu

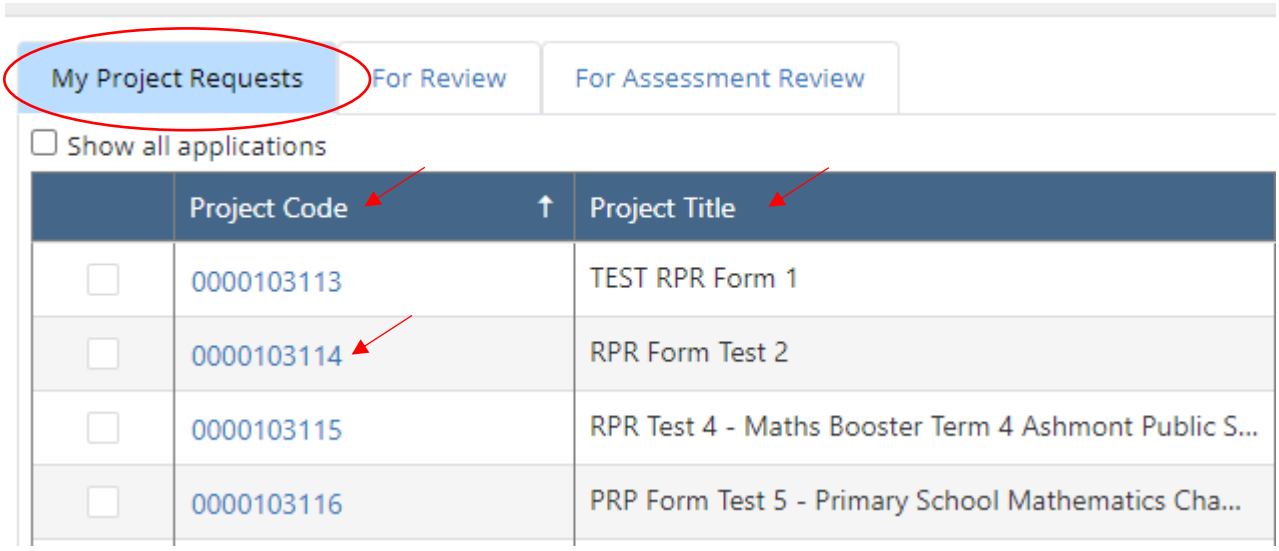


Select – **Research Project Requests** from the Projects Menu

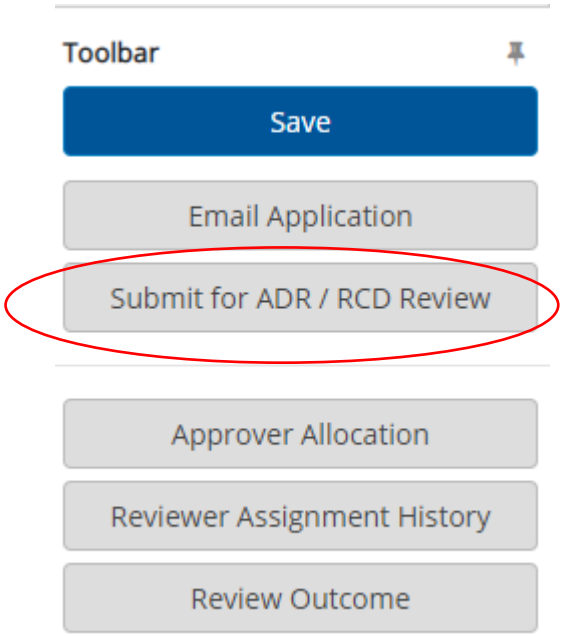


The screen will open and display **a list of Research Project Requests you are named on under the My Project Requests** tab. Review the Project Code and Project Title columns to ensure you are selecting the correct form.

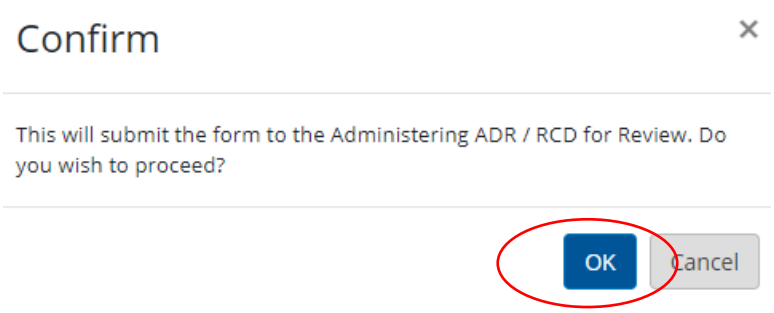
Select the correct RPR form by clicking on the blue text in the **Project Code column**. The form will open in a new window.



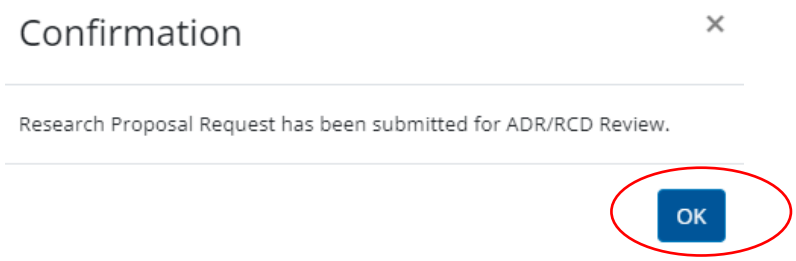
To submit the form for ADR / RCD review. Access the **right-hand** **<u>Tool bar menu and select Submit for ADR/RCD Review</u>**



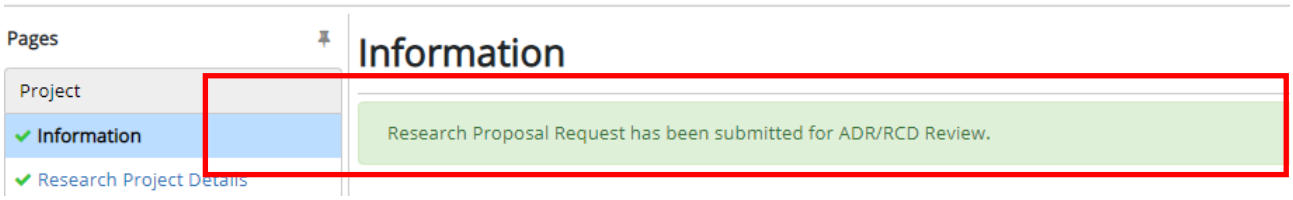
An onscreen prompt will appear – **select OK**



An onscreen Confirmation box will appear – Research Proposal Request has been submitted for ADR/RCD Review. **Click Ok to clear the message**.



The system will automatically **send an email to appropriate ADR or RCD**. NOTE on screen message RPR Submitted for ADR/RCD Review.



The Chief Investigator should press SAVE in the right hand menu and now logout.

*** Note: If the RPR form does not progress to ADR/RCD review it means there is some error in the person allocated to that role. Research Services will be notified to undertake corrective action via email if this occurs.

NEXT ACTION - The RPR form has been sent to the ADR or RCD for Review .

WORKFLOW STATUS - Project Request Status: **Pending Application** Workflow State: **ADR / RCD Review.**

10. Information for ADR or RCD

The **ADR or RCD allocated to approve this RPR** form is determined by the Administering School or Research Centre allocated at Project Details. For example, ILWS – is a Research Centre, therefore the Research Centre Director has final sign off on the RPR form.

The **RCD** or **ADR** will receive an email inviting them to access the RPR form, preview its content, and add their approval to the form.

An **RCD** or **ADR** acceptance of the RPR form confirms approval of the following:

- the quality review and completeness of the application has been undertaken;
- the application is complete, with supporting documentation as required;
- the Research Centre or Faculty resource commitments are appropriate and available;
- the proposed project fits within the research priority areas of the Research Centre or Faculty;
- all leverage commitments have been confirmed and evidence is attached in the RPR form;
- the ROI is appropriate for the staff involved and project; and
- any risks have been measured and considered.

N.B. The Research Centre Director approval also indicates approval for the administering organisation unit (Research Centre) to accept administration of this project, noting the project is viable within the administering Centre resources, personnel and funding requested to support the project, accepting also the financial management and mentoring associated with the project.

11. ADR /RCD Review – Submit to Research Services

The **ADR / RCD allocated to approve this RPR** form is determined by the CSU Administering School or Research Centre allocated at Project Details.

If a Research Centre is nominated as the CSU Administering Unit, the Research Centre Director will receive the email requesting they review and approve the RPR form.

If the nominated CSU Administering Unit is a School, the Faculty ADR will receive the email requesting they review and approve the RPR form.

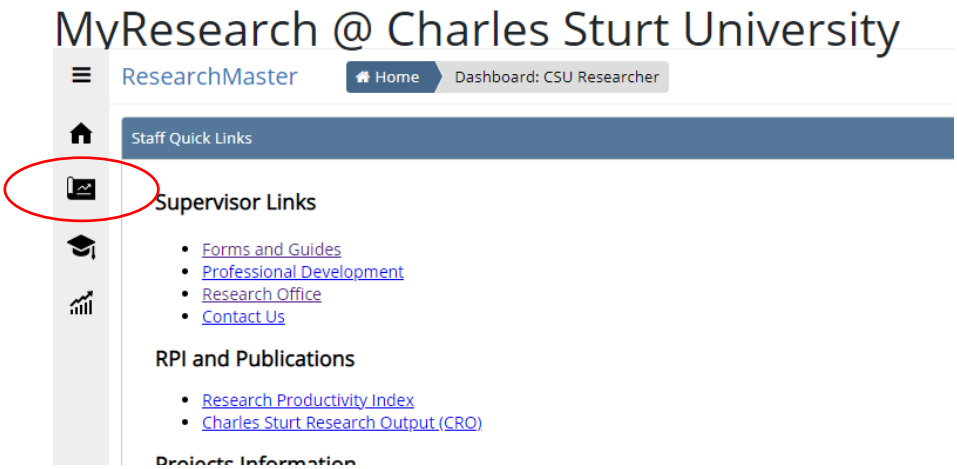
To complete the ADR / RCD Review and Submit the RPR form to Research Services complete the following steps.

Access the RPR form

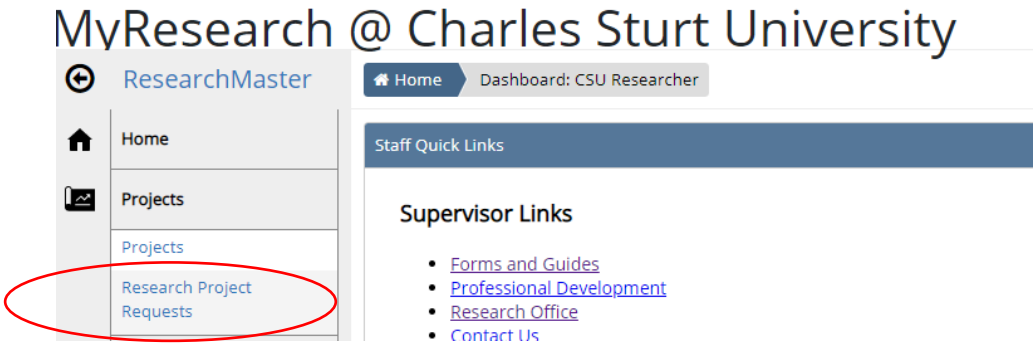
Login to Research Master https://myresearch.csu.edu.au/RME

Enter your Charles Sturt username and password.

Locate the **Projects Icon** on the left hand side menu and click the icon to open the menu



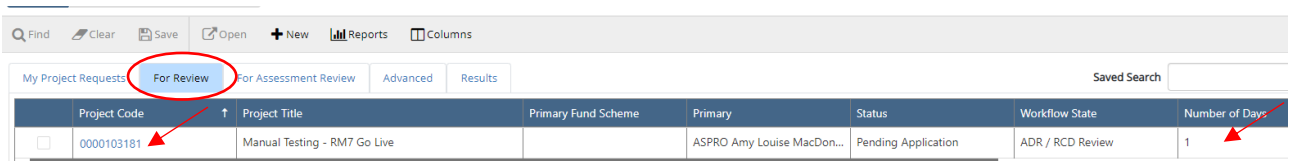
Select – **Research Project Requests** Form from the Projects Menu



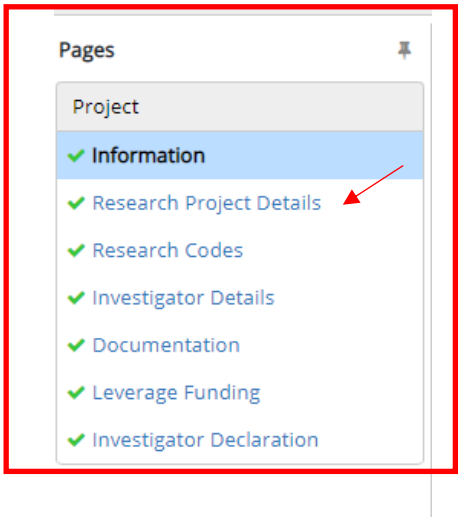
The screen will open – **Click on the <u>For Review</u>** tab. A **list of Research Project Requests under your delegation that require ADR / RCD Sign off will be displayed.**

Review the Project Code and Project Title columns to ensure you are selecting the correct form. You will notice in the Number of Days column how long the RPR form has been awaiting your action. The Workflow State column indicates the RPR form is currently with the ADR / RCD for review.

Select the correct RPR form by clicking on the blue text in the **Project Code column**. The form will open in a new window.



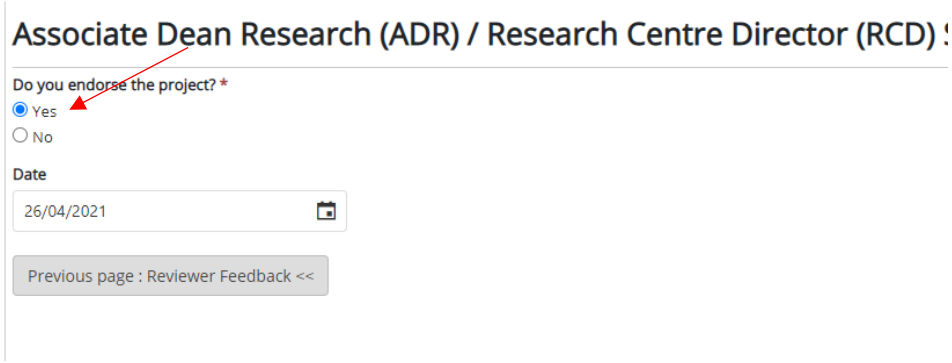
To review the project details use the Pages Menu on the left hand side. Move through the pages by clicking on each blue heading. The green ticks indicate the information on each page is complete.



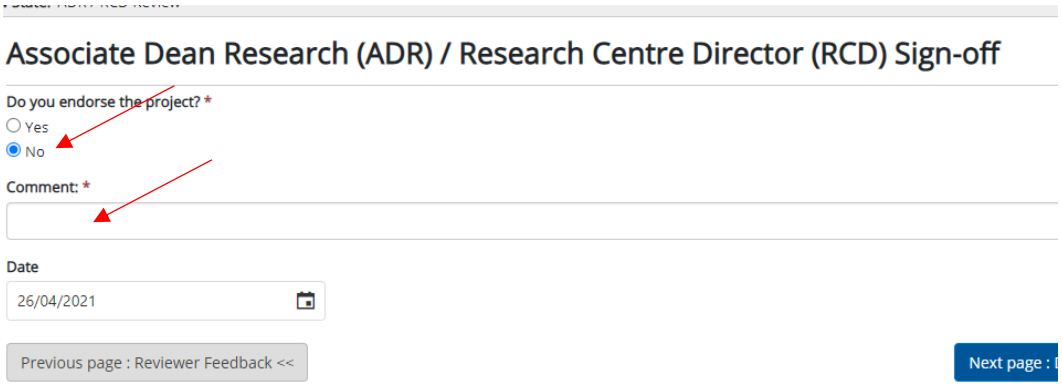
***** IMPORTANT NOTE:** Any ADR or RCD who has concerns with any of the content of the RPR form should contact the Investigator reporting directly to them, or the project Chief Investigator to seek clarification. This should be done via email or telephone outside the RPR form.

To approve the application – Click on the **Associate Dean Research (ADR) / Research Centre Director (RCD) Sign-Off** from the left hand pages menu as per below.

Answer the question – Do you endorse the project? Click Yes if you endorse – the date will appear.

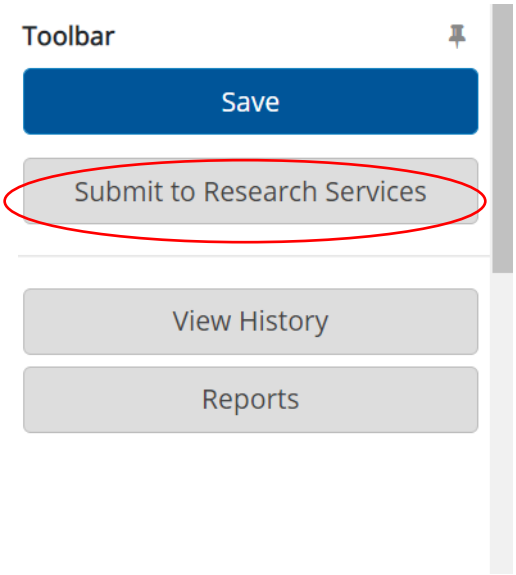


If you do not endorse this application you can select No – a comments box will appear. Enter your reasons why in the comments box. **This RPR form should still be submitted to Research Services with your non-approval and comments.**

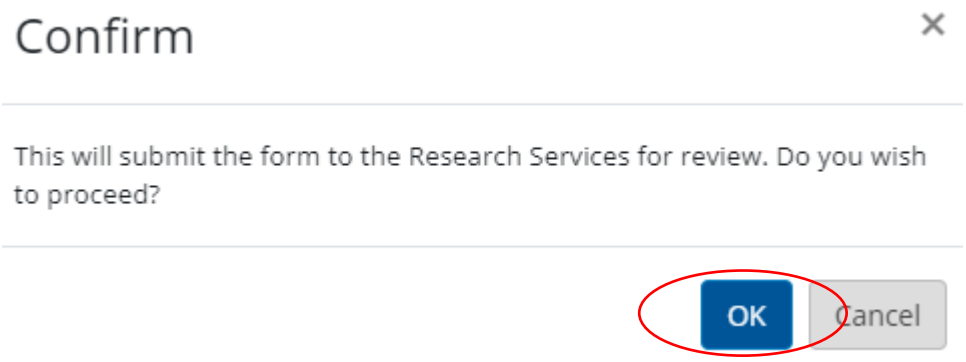


To submit the application to Research Services

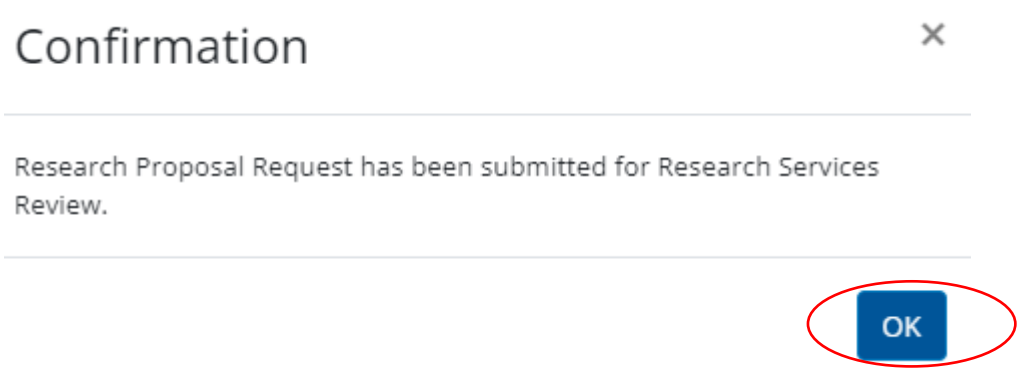
Click the **Submit to Research Services** tab on the right hand toolbar menu



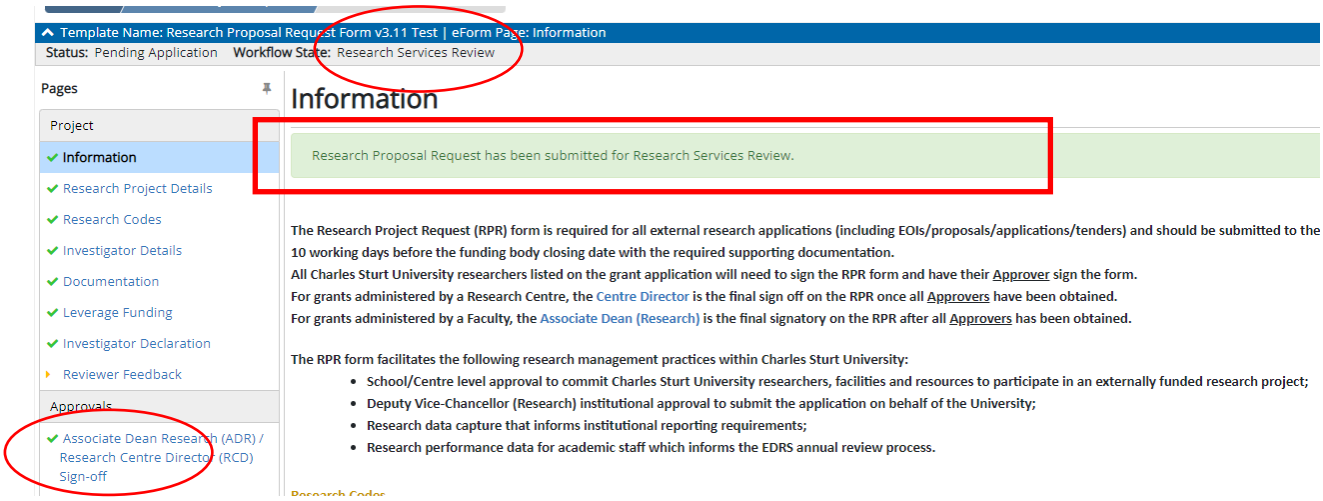
An onscreen message will appear, **select OK**



A secondary onscreen message appears confirming the action



Research Services will be notified the RPR form **is ready for review.** Note status messages on screen, Workflow update is now Research Services Review, Approvals has validated with a green tick.



The ADR / RCD should now log out.

NEXT ACTION - The RPR form has been sent to Research Services for Review.

WORKFLOW STATUS - Project Request Status: **Pending Application** Workflow State: **Research Office Review.**