

Research Master Projects Module

Quick Reference User Guide for Researchers

Office of Research Services and Graduate Studies **Charles Sturt University** 

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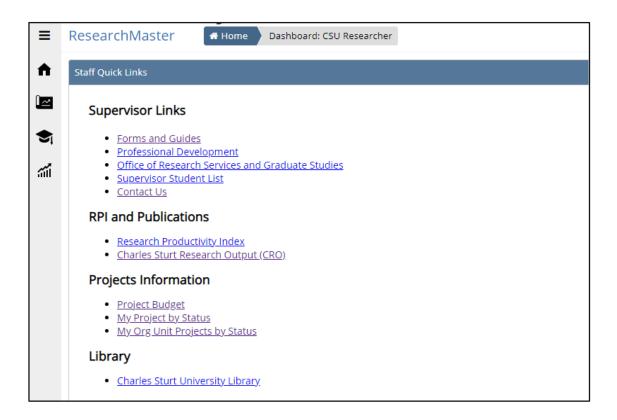
# 1. Access to the MyResearch Database

Use your CSU User Name and password to log into the MyResearch site.

https://myresearch.csu.edu.au/

#### Please note:

Approved Charles Sturt staff have access to the researcher and student profiles in MyResearch. MyResearch will open on the user dashboard page.

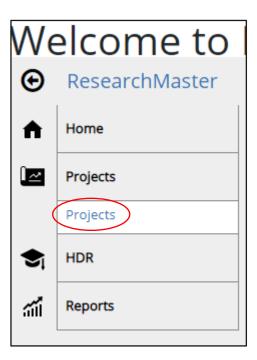


# To access your Projects

From the left hand menu bar on your dashboard, click on the icon

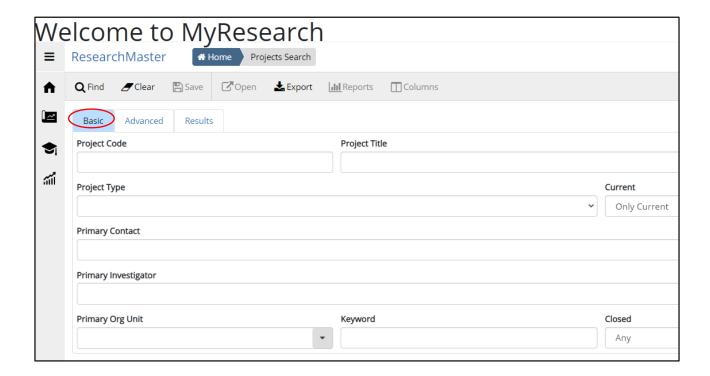


This will open the menu – select  ${f Projects}$  from the menu.

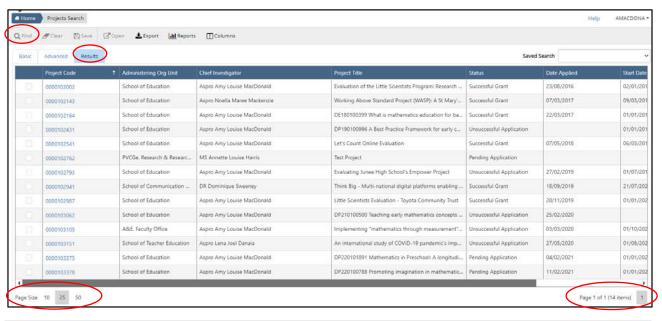


# 2. View Project List

The screen will default to the Basic tab with no information in the fields. This is where you can start a search or move to full project listing.



To show all projects where you are listed as either a Chief investigator or a Co-investigator, click on the **results button**. Alternatively, you can use the **find button**.



The list shows all of your pending, successful and unsuccessful projects.

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 forth through the listing by clicking on the next page number.

You can also select page size to expand the listed projects view using

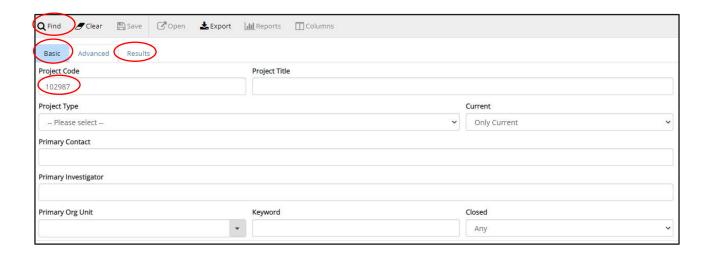


#### **Search Function**

• If you want to sort by **Successful** project or by **End Date** or **Administering Org Unit** you can do this by clicking on the blue table headings on the column you wish to sort.



- You can use the slide bar at the bottom of the table listing to move backwards and forwards eg. to see the start date and end date of each project (according to the agreement).
- If you wish to search for a particular project, click on the **Basic button** where you can enter the project code or the project title to find your project. Click on **Results** or **Find** for the result.



# 3. Navigating the Projects Module

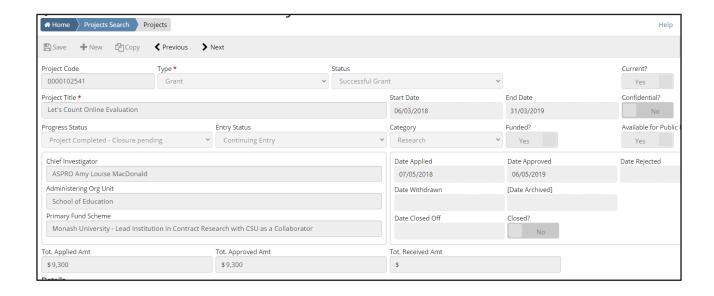
Each project listed in the Projects Module has its own unique identifier known as a project code. This number is generated when the record is created.

Each project code listed in the column below is an active hyperlink which will take you into the project record. Click on the record to select.

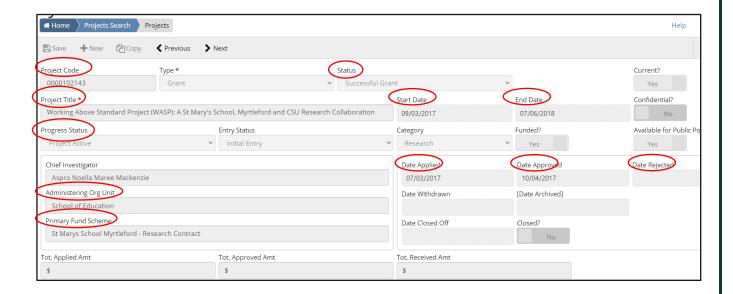


The project record will open up in one long page and to access all the information you will need to scroll down the screen.

Core project details are located on this screen.



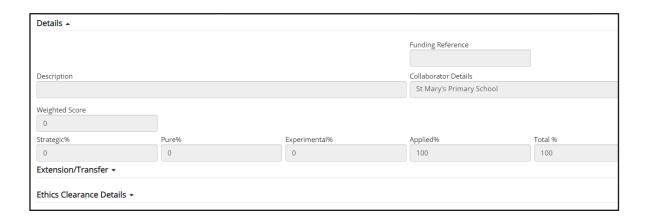
# **Core Project Details**



Project Code	RM generated unique project identifier	
Status	This will change from pending to either successful or unsuccessful	
Project Title	As per executed agreement	
Progress Status	This will change depending on the process moving from pending to successful eg. request for BAF	
Start Date	The start date of the project as per executed agreement	
End Date	The end date of the project as per executed agreement	
Date Applied	Date the NTS form was approved by the DVC-R	
Date Approved	Date fully executed agreement was signed	
Date Rejected	Unsuccessful notification date	
Primary Fund Scheme	Primary funding body invoiced for project income	
Administering Org Unit	Charles Sturt Org Unit administering the project funding	

Scroll down the page, the headings below contain further project details and can be accessed by clicking the down arrow to open the detail. You can condense the details again by clicking the up arrow.

Details ▼
Extension/Transfer •
Ethics Clearance Details ▼
Timeline -



The blue tabs at the bottom of the page are called **Related Items** and within each tab you can access detailed information.



## **Related Items Categories**

The blue headings at the bottom of the page are called Related Items. These fields come from what was entered on the NTS form.

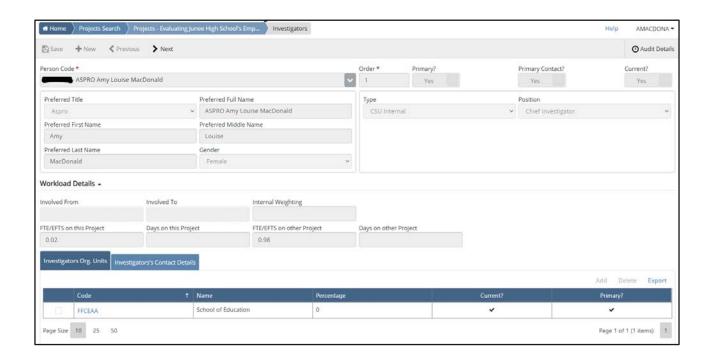
To access the information in each field click on the heading to expand each section.

### Investigators

This section displays the list of current and non-current Charles Sturt researchers on each project.

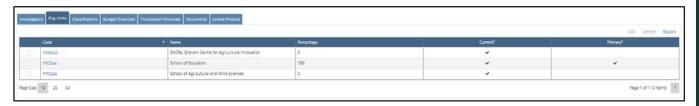


Each line is an active record, you can access further information regarding position, FTE (which is drawn from the NTS form) and Org Unit (drawn from HR) by clicking on the blue number in the Order column.



### **Org Unit**

This will show the administering org unit location of each researcher. The data is a direct feed from the HR system. The administering org unit for a project is nominated on the NTS form. Where multiple admin org's are listed, the lead administering org unit will be allocated 100% and marked as Current and Primary.



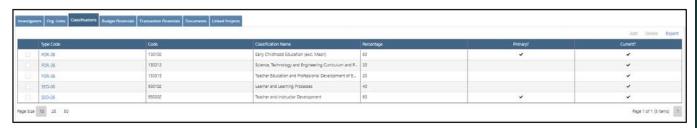
#### **Fund schemes**

A fund scheme is created for each Project to manage internal University reporting and to identify the source of income for the project. Where a fund scheme appears as Primary and current you will see the boxes ticked. This is the organisation primarily being invoiced for project funding.



#### **Classifications**

Displays the FOR and SEO codes that have been nominated in the NTS form. The codes are collected at a 6 digits level. You will note one FOR and SEO code is ticked primary and will display the highest %.



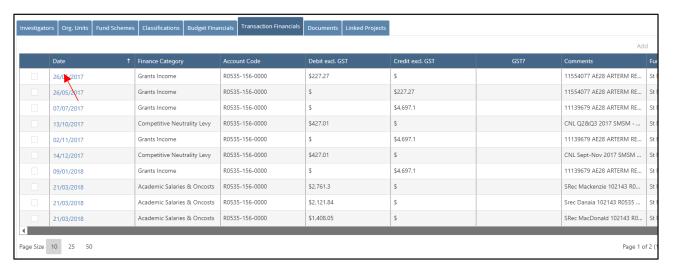
### **Budget Financials**

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 in the Account Code column.

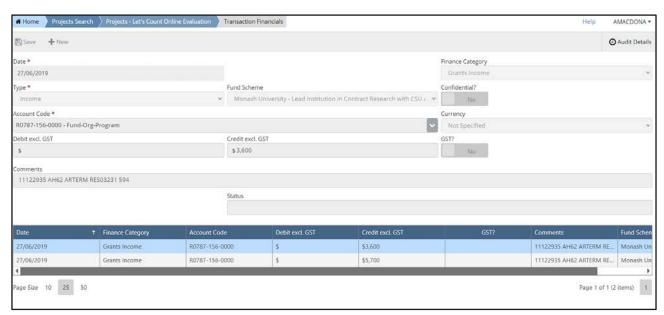


#### **Transaction Financials**

- Visible for a funded project
- The income or expense category will be listed under the Finance Category column
- Income will be shown as credit figures and excludes GST
- Expenses will be shown in the debit column
- Comments feed from transaction information from Unimarket and Banner Finance



Select one of the transaction lines by clicking on the blue date link. This screen has the transaction information as seen below.



The transactions screen has an export function. Click export to extract transaction data into an excel spreadsheet. This is useful for you to keep track of income and expenditure transactions on your project.



#### **Documents**

This section shows core project documents: BAF, Application, Research Agreements etc. Document access is restricted to the Chief Investigator.



Click on a document to access the hyperlink screen. Click on blue hyperlink to open and view the document.



If the link is not working contact Research Services extension 32578 for assistance.

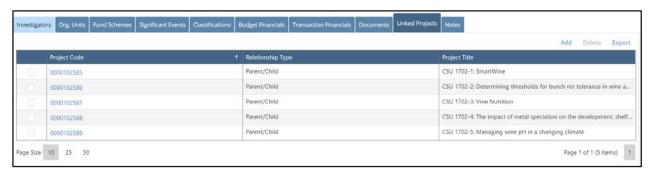
## **Linked Projects**

Where there is a parent/child project under a Head Agreement and/or a funding link or the project has been split into phases or parts, project records may be linked. You will see if a project is linked to another utilising 'Linked Projects' in the example below.

Select a project that is the head agreement or one you know should be linked to another project.



Go to **Related Items** and choose **Linked Projects**. This is where you will see the projects linked to the head agreement.



# 4. Generating Project Reports

## **Crystal Reports**

Basic reports that can help the researcher managed a project or query records in Research Master are located on the dashboard under Projects Information. The main two reports utilised are called **Project Budget** and **My Project by Status**.

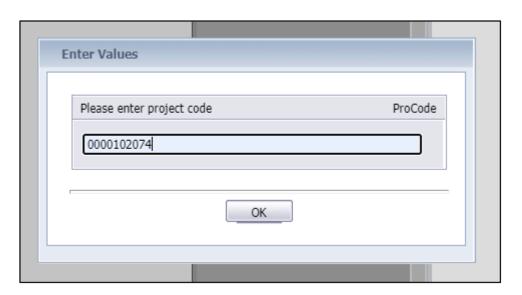
**Note:** The report – My Org Unit Projects by Status – is available for RM users with a designated role only, for example Head of School, or Executive Dean and will display all records at a School or Faculty level. Advice on how to access this report is not contained in this general guide for researchers.

# Projects Information

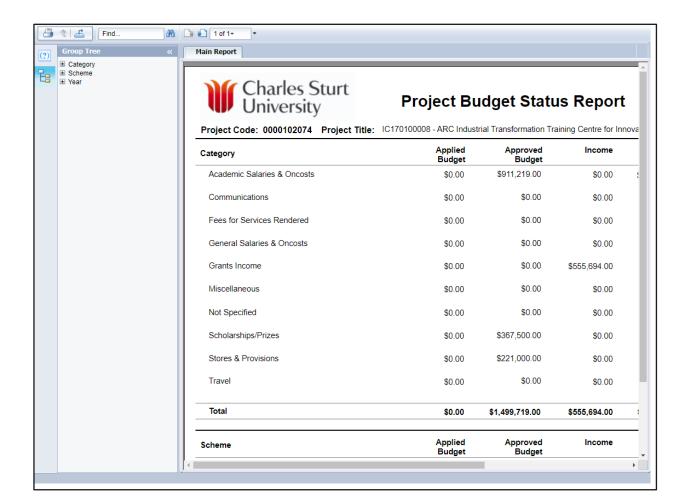
- Project Budget
- My Project by Status
- My Org Unit Projects by Status

### **Project Budget Report**

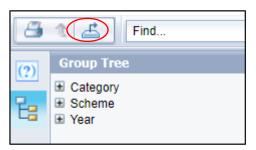
- Access the Project Budget hyperlink on your dashboard. This will open a new browser tab.
- Enter the project reference number into the Enter Values dialogue box (after the zeros) and select OK



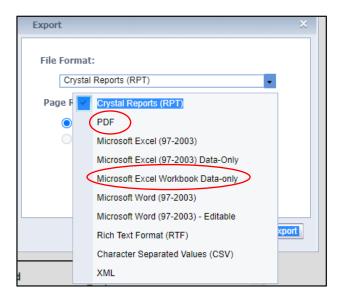
The Project Budget Report will be generated onscreen. The report is viewable in this format using the slide bars to access all the information (size of the report screen is restricted).



To generate a pdf or xls format report select the export button



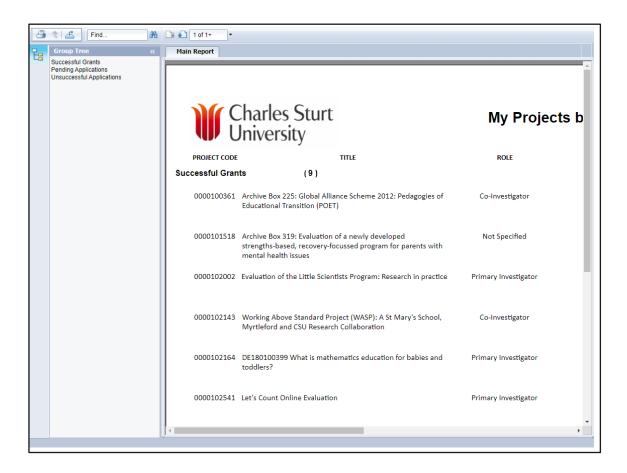
Select either pdf or Microsoft Excel Workbook Data-only and click on Export



## **Project by Status Report**

Access the Project by Status hyperlink from the dashboard. It will open up in a new browser tab.

Project by Status report will be generated on-screen. The report is viewable in this format using the slide bars to access all the information (size of the report screen is restricted).



To generate a pdf or xls format report, select export button.



Select either pdf or Microsoft Excel Workbook Data-only and click on Export

