Executive Summary

The Notice to Submit PDF form used to obtain internal Charles Sturt University approvals for all research funding applications submitted to an external funding organisation is replaced by the Research Project Request (RPR) form within Research Master, as of October 2019.

The RPR form replaces the need to direct and track individual emails throughout the approval process, improving visibility of approval workflows and approval efficiency within one location. The RPR also enables improved data recall.

This guide enables Investigators, Approvers, Research Centre Directors and Associate Deans Research to complete and approve the RPR, prior to being lodged with the Research Office for review and recommendation to the Deputy Vice-Chancellor (Research and Engagement).
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1. Information for Investigators

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

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

For grants administered by a Research Centre, the Centre Director is the final sign off 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 Charles Sturt 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 and Engagement) 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.

FOR AND SEO CODES

Charles Sturt University uses FOR and SEO Codes in various institutional reporting to demonstrate the University's research capacity. For research grants data collection, FOR and SEO codes are collected via the RPR form at the time an application is submitted to the Research Office. 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 the Research Office on 02 6933 2578.

2. Accessing the Research Project Request Form

Login to Research Master
https://myresearchqa.csu.edu.au/RME6

Select – Research Project Requests Form from the Online Forms listing

To initiate a new Research Project Request – select Create Project Form

Select – RPR Form from the eForm Templates by clicking on the blue text in the Abbreviation Column
The Page will appear like this – **Your Research Project Request will be allocated a reference number.**

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

**NEXT ACTION** – Complete the RPR – Project Details
3. Completing the Research Project Request Form

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

**Research Project Details**

**NOTE** fields marked with an * are mandatory

- *Funding Body Name* = name of the external funding organisation providing funds
- *Funding Body Scheme Name* = name of the scheme to which you are applying from the funding body
- *Start Date*
- *End Date*
- Funding Body Contact name = list the contact name at the funding organisation if known
- Funding Body Contact Number or email address = list the telephone number or email address relevant to your funding body contact
- *Funding Body Due Date* = external funding body closing date
Research Project Details

- Project Title
- Lead Institution submitting the application to the funding Body
- Total Funding Requested = total amount of funds requested in the project budget (enter numeric value only e.g $50,000 should be entered as 50000).
- 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

**Project Title**
RPR User Manual Test Project

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

**Total Funding Requested**
50000

**Funding administered by CSU (GST exclusive)**
45000
• * CSU Administering School or Centre – this will default to the Administering Unit of the Chief Investigator.

CSU Administering School/Centre Name
FFCEAA

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

Click in text box and delete existing text

CSU Administering School/Centre Name

Type the name of the Administering School/Centre

CSU Administering School/Centre Name

Select magnifying glass to search – the search function will return your search

CSU Administering School/Centre Name

• * Defence Trade Controls – Does this proposal fall within the Defence Trade Controls Act 2012? - select Yes or No

• * Type of Research – enter 100 in the box against the correct research category. Tab to move to next question.

• * Ethics Approval – Do you require Ethics Approval to conduct this research project? – select Yes or No
Does this proposal fall within the Defence Trade Controls Act 2012?
- Yes
- No

<table>
<thead>
<tr>
<th>Type of Research</th>
<th>Strategic Basic</th>
<th>Pure Basic</th>
<th>0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experimental Dev.</td>
<td>0.00</td>
<td>Applied</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total %</strong></td>
<td><strong>100.00</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you require Ethics approval to conduct this research project?
- Yes
- No

To move to Research Codes – use the in the bottom right hand corner of the page.
**Research Codes**

A maximum of 3 FOR and 3 SEO codes should be entered. The total FOR and SEO codes must equal 100%. **Codes must be 6 digits and not end in 00.** The RO will return the RPR form to the Chief Investigator for correction if incorrect FOR and SEO codes are entered in the RPR form.

**To add FOR Codes**

Select the dropdown arrow in the Classification Name/Code field and scroll down to select FOR code and name

- Select the applicable FOR code
- Select Primary - Yes or No
- Enter % out of 100
- Select ok
NOTE Screen Notification advising FOR % will appear if total % entered does not equal 100

To add additional FOR codes repeat the above steps.

The FOR Codes will appear like this once added in full.

Research Codes

Field of Research Codes - (Codes must be 6 digits and not end in 0. The RPR form will be returned to the Chief Investigator for correction if incorrect FOR codes are entered in the RPR form)
To add SEO Codes

Select the dropdown arrow in the Classification Name/Code field and scroll down to select SEO code and name.

- Select the applicable SEO code
- Select Primary - Yes or No
- Enter % out of 100
- Select ok
To add additional SEO codes repeat the above steps.

The SEO Codes will appear like this once added in full.

Socioeconomic Codes - (Codes must be 5 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)

To move to Investigator Details – use the in the bottom right hand corner of the page
Investigator Details

Chief Investigator

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

Click on preferred full name to open the Chief Investigator record

Default ‘Position’ for lead CI will always be Chief Investigator

- Enter workload details for this project % week
- Enter workload for all other current research project % week
- Primary? This field should always appear as YES by default. If it doesn’t, select YES.
- Select Ok
Add Co Investigators (CSU researchers only)

- Type surname of Co-investigator into Name/ID search box and select magnifying glass to search

  ![Name/ID search box]

- A text box will open listing found personnel – under the following headings

  ![Found 4 Matching Personnel]

- Select the correct researcher by clicking on the blue text in the Preferred name field (ensure you check their Org Unit column and Admin Unit column to double check the correct person).

The Co-Investigator Screen will then open like this

- Enter workload details for this project % week
- Enter workload for all other current research project % week
- Select OK

![Co-Investigator Screen]

To add additional Co-Investigators repeat the steps above.
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.

To move to Documentation – use the in the bottom right hand corner of the page
**Documentation**

The Documentation page will appear like this

```
*Proposals:* *Budget:* *Support Letters:* *Scheme Guidelines:*
```

**Other Supporting Documentation:**
```
<table>
<thead>
<tr>
<th>Add</th>
<th>Document type</th>
<th>Name</th>
</tr>
</thead>
</table>
```

Supporting Documentation marked with an * is mandatory to enable the application to proceed.

To **add a document** under the relevant headings (Proposal, Budget, Support Letters, Scheme Guidelines) select the **Browse button** to access your document location.

Select **Document and Open.**

Select **Upload** to add the document to the form. The document will then appear like this.

To **delete the attachment** – select Remove.

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

- **Name** – Enter name of document
- **Document Type** – select soft copy

Select the browse button to access your document location. Select the document and Open.

Select Upload to add the document to the form. The document will then appear like this.

Select OK to finalise or OK and Add another to confirm and add another record.

To move to Leverage Funding – use the in the bottom right hand corner of the page
Leverage Funding

The Leverage Funding page will open like this - there are two questions to complete.

- Leverage Funding
  - Have you requested and obtained any Faculty, School or Research Centre strategic leverage funding for this proposal? *
    - Yes
    - No
  - Have you obtained any DVC RE strategic leverage funding for this proposal? *
    - Yes
    - No

If you have NOT obtained leverage funding from the relevant source select NO.

If leverage funding has been obtained – select Yes – the screen will add a section for you to upload evidence of leverage commitments.

Each source of leverage funding should be added individually.

- Leverage Funding
  - Have you requested and obtained any Faculty, School or Research Centre strategic leverage funding for this proposal? *
    - Yes
    - No

Please attach evidence

<table>
<thead>
<tr>
<th>Document type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To add evidence of leverage funding - select **add** – to open up the next screen.

**Enter Name** – enter Source of Leverage - for example ‘BJBS Leverage’

**Document Type** – Soft Copy

**Browse** – to select the location of your document

---

**Upload** – to upload the document to the form

Select **OK** to finalise or **OK and Add another** to confirm and add another record.

---

The page will appear like this with evidence of leverage commitments attached.

**Leverage Funding**

Have you requested and obtained any Faculty, School or Research Centre strategic leverage funding for this proposal? *

- Yes
- No

Please attach evidence

---
Evidence of leverage is required for both questions if you have selected YES.

To move backward through the form to review previous sections – use the arrows in the bottom right hand corner of the page.

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

**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 (Chief Investigator)

To initiate Investigator Sign Off hover over the Action Tab and select “Initiate Investigator Signoff” from the options list.

Onscreen prompts will appear - Select Ok.

This will move the form to the investigator Sign-off state. Do you wish to proceed?

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 – see error message example below.
When the form is sent for Investigator Sign-Off - you will note the onscreen updates to the forms status and message bar indicating the form has been sent for Investigator Sign Off.

An email will be sent to each Co Investigator requesting they sign the Declaration and add their Approver. You can now exit the RPR form.

**NEXT ACTION** - The RPR is now ready for all Investigator Sign-Off.

**WORKFLOW STATUS** -  Project Request Status: Pending Application  Workflow State: Investigator Sign-off
5. Completing the Investigator Declaration and Adding your Approver

All Investigators listed on the RPR form will receive an email inviting them to access the RPR form, preview its content, sign their Investigator Declaration and add their Approver to the form. An ‘Approver’ is the immediate Supervisor who can sign-off on the Co-Investigator’s involvement in the research project.

The Chief Investigator will also need to sign the Investigator Declaration and add their Approver to the form.

To access the RPR form

Log in to Research Master
https://myresearchqa.csu.edu.au/RME6

Select – Research Project Requests Form from the Online Forms listing

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, and Primary Investigator 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 complete your Investigator Sign-Off

Select ‘Investigator Declaration’
Select your name from the available list

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Position</th>
<th>Declaration signed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR Amy Louise MacDonald</td>
<td>Chief Investigator</td>
<td></td>
</tr>
<tr>
<td>Dr Tamara Cumming</td>
<td>Co-Investigator</td>
<td></td>
</tr>
<tr>
<td>Prof Wendy Lyn Bowles</td>
<td>Co-Investigator</td>
<td></td>
</tr>
</tbody>
</table>

Tick the Declaration signed? box. A date field will then appear. Select Ok to finalise.

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

Investigator Declaration

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Position</th>
<th>Declaration signed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR Amy Louise MacDonald</td>
<td>Chief Investigator</td>
<td>✓</td>
</tr>
<tr>
<td>Dr Tamara Cumming</td>
<td>Co-Investigator</td>
<td></td>
</tr>
<tr>
<td>Prof Wendy Lyn Bowles</td>
<td>Co-Investigator</td>
<td></td>
</tr>
</tbody>
</table>
**To add your approver**

Select the **Review Button** and select **Approver Allocation**

Select the drop down list – **Add Panel**. A list will display. Select the Approver role from the drop down list who can sign off on your involvement in this project.

If your approver can be found within the drop down list the Approver will then automatically be added to the Reviewer Group. At this point you can log out.

**If your Approver does not appear in the list type the name of your Approver** in the ‘Select Reviewer Box’ and use the magnifying glass to search.

Once all Investigators have signed their Declaration and added their Approver, the Chief Investigator can initiate form to Approver Sign-Off.

**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 (Chief Investigator)

The **Chief Investigator is required to initiate Approver Sign Off** – this can only occur once all investigators have accepted their declaration and allocated Approvers. The Declaration page will show all investigators have completed their declaration.

**To access the RPR form**

Log in to Research Master

https://myresearchqa.csu.edu.au/RME6

Select – **Research Project Requests** Form from the Online Forms listing

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, and Primary Investigator 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 initiate Approver Sign-Off**

Select the Action Tab

Select Initiate Approver Sign-Off

Email Application

Initiate Approver Sign-off

Note on Screen Message – Select OK

This will submit the form to the Approver(s) for Sign-off. Do you wish to proceed?

[OK] [Cancel]
IMPORTANT NOTE - Be aware of error messages which block the form moving to Initiate Approver Sign-Off – this error indicates all Investigator signatories have not been completed.

The message bar will appear indicating the Report 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 researchers 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 application;
- the researcher’s capacity to undertake the project within their research workload allocation;
- any funding 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

Log in to Research Master
https://myresearchqa.csu.edu.au/RME6

Select – Research Project Requests Form from the Online Forms listing

The screen will open and display like this. Select the Approver Review Tab.
A list of Research Project Requests will appear under the Approver Review Tab. Review the Project Code and Project Title, and Primary Investigator columns to ensure you are selecting the correct form.

Select the correct project form by clicking on the blue text in the Project Code column. The form will open in a new screen.

To review the project details use the menu on the left hand side.

To approve the RPR form select the Action tab, and Approve
From the onscreen prompt, 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.

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

![Welcome to MyResearch](image)

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.**

![Welcome to MyResearch](image)

**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 RCD or ADR Sign-Off (Chief Investigator)

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

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

*CSU Administering School/Centre Name*

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

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

**To access the RPR form**

Log in to Research Master

https://myresearchqa.csu.edu.au/RME6

Select – Research Project Requests Form from the Online Forms listing
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, and Primary Investigator 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 form for ADR or RCD review. Access the Action Tab, and select Submit for ADR/RCD Review

An onscreen prompt will appear – select OK

This will submit the form to the Administering ADR / RCD for Review. Do you wish to proceed?
*** The system will automatically send an email to appropriate ADR or RCD. NOTE on screen message bar ‘Application Submitted for ADR/RCD Review.

The Chief Investigator should now logout.

*** Note: If the form does not move, the RO will be notified to undertake corrective action.

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

WORKFLOW STATUS - Project Request Status: Pending Application Workflow State: ADR / RCD Review.
10. Information for RCD or ADR

The **RCD or ADR allocated to approve this RPR** form is determined by the CSU 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;
- the proposed project fits within the CSU Research Narrative;
- 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. Complete the RCD or ADR Sign-Off – Submit to the RO

The RCD or ADR 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 for Sign-Off. If the nominated CSU Administering Unit is a School, the Faculty ADR will receive the email for Sign-Off.

To access the RPR form

Log in to Research Master
https://myresearchqa.csu.edu.au/RME6

Select – Research Project Requests Form from the Online Forms listing
Select **General Review Tab** - the screen will open and display a list of Research Project Requests awaiting your approval. Note the Workflow State and Number of Days columns to determine how long it has been awaiting approval. **Review the Project Code and Project Title, and Primary Investigator columns to ensure you are selecting the correct form.**

Select the correct project form by clicking on the blue text in the Project Code column.

The page will open like this.

To review the project details use the menu on the left hand side.

*** IMPORTANT NOTE: *** Any ADR or RCD 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.
To approve the application – select Associate Dean Research OR Research Centre Director Sign-Off from the left hand menu as per below.

To endorse the project – Select Yes – 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 the RO with your non-approval and comments.

To submit the application to the Research Office

Select the Action Tab, and Submit to Research Office
An onscreen message will appear, select OK

This will move the application to the Research Office Review. Do you wish to proceed?

The application will be moved to the Research Office Review – an email will be sent to research@csu.edu.au advising the application is ready for review. Note alert message on message banner.

The ADR / RCD should now log out.

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

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