RMS Grants – User Guide for Lead Investigators

This document outlines how Lead Investigators complete an Online Grant Registration Form and manage their existing grants using RMS Grants.

For assistance at any stage, please contact the UCD Research Office on 01 716 4040 or grantreg@ucd.ie.

1. RMS Grants

On receipt of confirmed funding from a sponsor or funding agency, an online Grant Registration Form is required to register the new funding and open an internal Research account (R account).

If the proposal for funding was submitted through UCD Research, a partially prefilled online form will be available. Please contact grantreg@ucd.ie to request this.

Please note: This form should not be used for Cost Extensions to existing research accounts (please contact grantreg@ucd.ie if you have received a cost extension).

1.1 Login to RMS Grants

Log in to https://rms.ucd.ie/ufrs_apex/f?p=1000:14 via UCD Connect

Enter your Connect Login details.

If it is your first time using the online form, you will be prompted to enter your UCD Personnel Number. An email will be sent to your UCD email account. Click on the link in the email to verify your details and you will then be registered to use RMS Grants.

When you enter RMS Grants you will be able to navigate into the 3 components:

- **Proposal Maintenance:** Access external funding applications submitted via UCD Research. Access any existing Seed Funding Proposals you may have here. When a Seed Funding Round is open, you can also create a new Proposal for Seed Funding here.
- **Register a New Grant:** If you wish to register a new grant, please contact grantreg@ucd.ie in the first instance. View historic approved Grant Registration Forms recorded at the time of registration. View incomplete online registrations under "Your Current Grant" tab.

- **Manage an Existing Grant:** View and manage existing grants. Easy access to information on grants such as team members, project details and budgets (including real-time financial expenditure).

2. Register a New Grant – Grant Registration

2.1 Completion of Grant Registration Form

Initiation of GRF

In order to register a new award, contact the Grant Registration Team at grantreg@ucd.ie. They will advise on documentation required and initiate the registration for you.

The Online Grant Registration Form is comprised of 6 Steps:

Step 1- Grant Summary

Grant Holder

- The Grant Holder is the Lead Investigator on the Research Account. If the Lead Investigator has logged in, the Grant Holder details are pre-populated from CoreHR. Only one Lead Investigator can be added but multiple Co-Lead Investigators or Collaborators can be added in either the Collaborations/Partners section in Step 1 if they have a separate budget or in the Team Members section in Step 5 if they do not have a budget.
- To change School affiliation or cost centre click on "Edit Grant Holder Details". Select the appropriate School (you must be affiliated to the School chosen). Select the corresponding Cost Centre from the dropdown list. There may be multiple cost centres to choose and if you are unsure please contact the Grant Registration Team for assistance. Select an affiliated academic Research Centre for this project if applicable. Select yes or no to the question asking if you have held an external research account before.
- Click "Save and Return" to return to Step 1. Click OK to associate the budget to this grant when prompted.

Please Note: If any of the pre-populated details are incorrect or if you are unable to choose the correct data, please contact grantreg@ucd.ie or call Ext 4040.

- Project dates may be edited In Step 1. Please ensure the dates match the award documentation.
- If you are completing the form on behalf of the Lead Investigator, click on "Edit Grant Holder Details". Complete the details of the Lead Investigator by clicking on the small blue icon   (Person Lookup). Insert the Lead Investigator's name or Personnel number and click "Search". Select the correct person by clicking "Select and Close". (Please note that TBC cannot be chosen.)

Funding Agency/ Sponsor

- To select the relevant funding agency or sponsor, click on "Add Funding Agency/Sponsor"
- Click on the small blue 🔍. (Sponsor Lookup) to select the relevant funding agency or sponsor. You must choose from the list available. Enter the name of the funding agency or sponsor and click "**Search**". Select the correct funding agency or sponsor by clicking "**Select and Close**". If you are unable to find the correct name, please contact grantreg@ucd.ie or call Ext 4040 and it will be added to the list.

- Enter Funding Agency/ Sponsor amount (Direct and Indirect Costs) in Euro and the Funding Agency Reference Number if applicable. Click "**Save and Close**"

Please note: More than one funding agency or sponsor can be added but each funding agency or sponsor selected requires a separate budget and creates a separate research account.

- Select the relevant **Programme for Funding** from the dropdown list. Select "Research Project" from the list if the programme is not specified by the funding agency otherwise please contact the UCD Research Office to request that the programme be added to the list.
- Select yes or no to the questions relating to Post-doctoral Fellowship award and Postgraduate Studentship award. Please only select yes if the award being registered is a designated Post-doctoral Fellowship or Postgraduate Studentship. This does not include generic project awards where post-doctoral fellows or students are merely team members to be paid from the research account.

Details of Collaborations/ Partnerships

- UCD Co-Lead Investigators/ Collaborators who will hold a separate budget/ separate research account can be added by clicking on "**Add a Collaborator/partner from UCD (if any)**".
- If funding is to be transferred to external collaborators/ partners (Transfer to Partners), click on "**Add other collaborators/ partners e.g. universities, companies, hospitals (if any)**". Choose the external partner from the list available by clicking on the blue icon. (External Lookup).

Please Note: If you are unable to find the correct name, please contact grantreg@ucd.ie or call Ext 4040 and it will be added to the list.

- Other collaborators/partners not holding separate budgets can be added into the free-text box "Other Collaborators/ Partners not holding separate budgets".

Contract Extensions

Please Note: You are not required to insert details here. If your grant receives further funding at a later date, a cost extension may be added to this existing grant and will be viewable here if applicable.

Supporting Documentation

- Before submitting the Grant Registration Form, please ensure that you have uploaded your Proposal, Confirmation of Award from the funding agency/ sponsor and any other supporting documentation.
- Click "**Next**" to save the details and continue to the next page. By selecting "**Save**" the information will be saved and you can log out and return to the GRF at a later stage.

Step 2: Research Details

- The Title that you inserted to initiate this Grant Registration Form will be viewable here. You may edit the title if necessary.
- Add a "Description of Project". You can paste content from a Word document.
- Select a relevant Research Theme.
- Answer the questions pertaining to ethical approval.
- Answer the questions pertaining to Hazardous Substances.
- Click "**Next**" to save the page and continue to next section.

Step 3: Financial Summary

Budget Allocations
- The UCD Budget (or Budgets if UCD Collaborators with separate budgets have been added in Step 1 Grant Summary) is listed here.
- To insert the budget details by category and year, click "Edit" in the budget table.
- If you have chosen more than one budget holder in Step 1, a "Budget Sub-Title" can be chosen. This optional field can differentiate budgets if more than one exists.
- Select the appropriate funding agency or sponsor from the dropdown list if you have chosen more than one in the Step 1.
- Insert the budget details. Please contact your College Finance Manager or delegate for assistance if required. When you insert the Employer's Gross Salary, the Employer's PRSI and Pension Contribution are automatically calculated. If the PRSI or Pension amounts are different to the automatic calculation, just click on Employer's PRSI (10.75%) Edit or Employer's Pension Contribution (15%) Edit and manually insert the correct amounts.
- To insert the Equipment and Other amounts in the budget, click on Equipment (edit) and Other (edit).
- To finish, click "**Save and Close**"

External Collaborators/ Partners Budgets (Transfer to Partners)

- If part of the award budget will be transferred to external partners and you have inserted the external partners in Step 1, an external budget table will be viewable. Click "Edit" to insert the budget details. Please note that only the totals for each year are necessary. This total should include Overheads if applicable. Click "Save and Return".

Please Note: The Grant Total (as entered in Step 1 -direct and indirect costs) is displayed at the top of Step 3.The budget details you allocate in Step 3 must equal the Grant Total.

Step 4 Funding Agency/ Sponsor Report/ Claim Dates

Please Note: Only the Research Finance Office complete this section

Step 5: Maintain Team

- UCD Staff Members and UCD Students may be added as Team Members. Their role in the project, dates working on the project and access rights can be added as appropriate. In order to add UCD Staff members and students, they must have an active Core HR staff record or be fully registered student on Banner, respectively.

Please Note: Administrators can also be added as Team Members so that they can view/edit the Grant Reporting record during and after the project dates.

Step 6: Submission

- Please tick the 2 boxes to indicate that you have read both the *Compliance of UCD Policies* and *Certification Statement*
- Click "**Save**" to save all your details.
- You can exit from the Grant Registration Form and return to the form at a later stage if you have not completed all the details or if you are awaiting documentation such as Confirmation of Award.

- Click "**Submit for Approval**" when you are satisfied that all of the relevant details and documentation have been included in the form.

2.2 Approval Process

When you **"Submit"** your **Grant Registration Form** (in Step 6 of the form), the form will be sent to UCD Research for initial review. You will be contacted if there are any changes/ additions required. The GRF will then be sent electronically and in sequence to the following approvers:

1. Research Finance Office
2. Head of School
3. UCD Research Finance Manager

Please Note: If any changes, comments or additions are required during the approval process, you will be contacted by the approver. If you would like the approver to also contact a member of your team, please email grantreg@ucd.ie with contact details.

*Please Note: Once you have submitted a GRF, you can log in at any stage to view and track its progress through the approval cycle. This is viewable in Step 6 – **Project Status** as the GRF is approved by the different units.*

2.3 Research Account Notification

When the Grant Registration Form has been approved by all approvers, the research account number will be sent to you by email (Rcode or Vcode if VATable account). Please note the in cases where the account is set up in advance of the start date of the project, the spending can not commence until the start date.

*Please Note: You can view a summary portfolio of your Grant Registration Forms in **Your Current Grants.** The status of the grant is viewable (i.e. Incomplete, Awaiting Approval or Financial Setup Complete) in the summary details.*

3. Manage an Existing Grant – Grant Reporting

3.1 How to use Grant Reporting

- When you access the **Manage an Existing Grant** component, your current registered grants will be viewable under *Search Your Grants*
- Click on MAINTAIN to view the grant details such as Project Summary, Team Members, Financial Details, External Partners, Grant Reports and Documentation (if applicable).

Please Note: The Research Account Number (Rcode or Vcode) is viewable in the "View Financials" section under the "View by Budget" heading

- The Lead Investigator and team members with edit access are able to edit the following fields: Description, Abstract, Add Project Update, Add UCD staff member to the project, Add UCD research student to the project.

Please Note: To change or query all other details, please contact the UCD Research Office on Ext 4040 or grantreg@ucd.ie

Change Log

- The Lead Investigator can update certain parts of the record (see above) and the UCD Research Office and the Research Finance Office can also update parts of the record (e.g. extensions, external partners, upload supporting documentation). If a change is made by the UCD Research Office or the Research Finance Office, an entry in the "**Change Log**" located in the "Project Summary" section is viewable. The date, type of change, reason for the change and any relevant documentation detailing the change are viewable.
- Changes such as No Cost Extensions, changes to the Lead Investigator and External Partners for example may be changed during the course of a grant, subject to institutional and funding agency approval. If you have any queries about Change Log entries, please contact the UCD Research Office on Ext 4040 or grantreg@ucd.ie for details.

Maintain Team Members

- The Lead Investigator or team member with edit access rights may add or remove Co-Lead Investigators, team members or students at any stage of the project in the "Maintain Team Members" section of Grant Reporting.

Add new Team Members:
- New **staff members** may be added by clicking on "Add a UCD staff member to the project"
- New **students** may be added by clicking on "Add a UCD research student to the project"
Remove Team Members:
- Click delete beside the team members' name to remove them from the record.

- Access Rights such as Edit All, View All or None can be given to the new Co-Lead Investigator, team member or student.
- The Lead Investigator or team member with edit access rights may add or edit the access rights of Co-Lead Investigators or team members at any stage of the project in the "Maintain Team Members" section of Grant Reporting. Click edit beside the team members' name to alter the role, access rights and duration of time the researcher is working on the project

Financial Details

- Up-to-date budget and expenditure details are fed from the eFinancials system and an overview of the expenditure and overall balance can be seen in the "View by Expense Type" section.
- For more detailed information, in the "View by Budget" section, the **Research Account Number** can be selected and by clicking on the live link, an Infoview financial report of the grant can be viewed directly. If prompted, log in to UCD Connect and you will be able to access the Infoview financial reports.

Please note: The Grant Reporting financials section only displays direct costs while both direct and Indirect costs are included in the corresponding Infoview report. Transfer to External Partner amounts are viewable in the _View Financials - External Partners_ section.

- Project dates and budget details in Grant Reporting are uploaded directly from the EFinancials system. If the EFinancials system has been updated by the Research Finance Office, (e.g. for a Cost or a No Cost Extension), the revised dates and budgets are viewable in your Grant Reporting record. A Change Log entry will also be added to the grant and is viewable in the "Project Summary" section.

Documents

- Please contact the UCD Research Office on Ext 4040 or grantreg@ucd.ie to request a supporting document to be uploaded. Documents such as research agreements, collaboration agreements or progress reports may be added during the course of the project.