AWARDS WORKFLOW

OVERVIEW

This guide explains the workflow of an award within Pure Research Management System (RMS).

PROCESS

1. RO Post-Award Team creates an award record.

2. Researcher edits the award.

3. RO Post-Award Team reviews and approves the changes.

4. RO Contracts Team prepares the contract (if required).

5. OFS creates finance budget and project codes.

6. RO Post-Award Team reviews and validates record.

STEPS

1. RO Post-Award Team receives the funding outcome notification.
   - For a successful application:
     - Creates an award record for the application.
     - Saves the status as “Entry in Progress”.
   - For an unsuccessful application
     - Record is closed.

2. Researcher receives an email notification of the newly created award and is required to check and verify the information in the record.
   - Accepts the award.
   - Attaches updated budget information.
   - Enters Field of Research (FoR) and Socio Economic Objective (SEO) codes.
   - Saves record status as “For Approval”.

3. RO Post-Award Team receives email notification of the researcher’s updates and performs the following actions:
   - Reviews the changes made by the researcher.
   - Updates the budget lines in the award record.
   - Creates milestones.
   - If a contract is required, RO Post-Award Team adds the tag “Contracts required”.
   - Changes the status to “Approved”.


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4. If a contract is required, the RO Contracts Team performs the following actions:
   • Contracts Team checks for awards assigned to them.
   • Upon completing the contract, the Team uploads the contract and adds the new tag “Contracts complete”, and removes the tag “Contracts required.”
   • Finally, the Contracts Team also assigns the tag “Financial Services required”.

5. OFS receives the notification via an e-Feed and performs the following actions:
   • Adds the “Finance Projects Code” and the “Finance Budget Code” within the IDs section of the Awards record.
   • Adds a new tag “Financial Services complete”.
   • Removes the tag “Financial Services required.”

6. RO Post-Award Team receives email notification of OFS’s action.
   • Reviews the changes and saves the record status to “Validated”.

For additional help:

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