CREATE AND SUBMIT A TENDER APPLICATION

OVERVIEW
This guide explains how to create and submit a tender application as a Researcher within the Pure Research Management System (Pure RMS).

PROCESS

1. Login to Pure
2. Create a tender proposal
3. Fill in fields
4. Save changes
5. Send for pre-approval

STEPS

1. Go to https://goto.mq.edu.au/myresearch and log in with your OneID and Password.
2. Click **Add new** to create a new application.

3. Follow the steps below to select the *Proposal* template.
   A. Click **Application**.
   B. Click **Application**.
   C. Click **Tender**.
   D. Click **Proposal**.

4. Provide a title and a description for the application in the *Identification* section.

   **Title**

   **Description**

   **NOTE**
   The description should be a proposal summary of no more than 750 characters (approximately 100 words).
5. Your details are automatically populated. To add additional applicants, click **Add person**.

![Add person](image)

**NOTE**
Refer to the Quick Reference Guide, “Add a co-applicant to an application” for more details.

6. If you have internal or external collaborative partners, select **Yes** under Collaborative application.

![Collaborative application](image)

To add collaborators:

A. Click **Add collaborator**.

B. A pop-up will be enabled. Search for the institution.

C. A list of suggestions will appear. Select the record that is **Research Services Verified**.

D. Check that the appropriate institution is marked as **Lead**.
7. To add the funding opportunity:
   A. Click the **Add funding opportunity** icon under Funding Opportunity.
   B. A search bar will appear. Enter the funding opportunity.
   C. Click on the title to select and link the Funding Opportunity to your application.

**NOTE**
If the Funding Opportunity is not listed in the drop-down menu, please contact the Research Services (RS) Pre Award Team to have it added.

8. To add funding:
   A. Click **Add funding**.
   B. In the search bar, type the funding organisation.
   C. A list of suggestions will appear. Select the record that is **Research Services Verified**.
   D. Scroll down to Financial summary and select **Financial**.
   E. Enter the Applied amount.
   F. Click **Create**.
NOTE

The funding organisations that are valid and correct are records that are “Research Services Verified.” If your nominated funding organisation is not “Research Services Verified”, please contact the RS Pre Award Team.

9. For a collaborative application, enter the institutional part to show the split of the applied amount between the collaborators.

![Split between the collaborative partners](image)

NOTE

- The institutional parts in total must equal the applied amount.

- When you enter the applied amount, do not use the dollar ($) sign or spaces. In the example above, the applied amount can be entered as any of the following, 20000, 20,000 or 20000.00.

- If applicable, multiple funding organisations may be added to the application by repeating Steps 9-12.

- To edit or delete a funding organisation, click Edit or the minus sign.

- When there are multiple funding organisations, they should be listed according to the applied amount from highest to lowest.

To change the order of the funding organisations, use the arrows on the right side.
10. To add the expected start and end dates of the project, use the calendar to find the dates or enter the dates directly for **Expected Start Date** and **Expected end date**.

![Calendar with selected dates](image)

11. To add a document:
   
   A. Click **Add document**.

   B. Drag the file or click **browse** to search for the file on your computer.

   C. Provide a title for the file.

   D. Choose the file type.

   E. Click **Create**.

### NOTE
- Make sure to always click **Create**. This will ensure a successful attachment every time.

- In addition to your detailed application, you are required to include a budget document in your submission, which shows the breakdown of costs. This document may be separate from your application or included within as one document.
12. If the proposed application is related to other previous or current projects, use the Related project section to link them. Click the Add project icon, search for the project and select from the list of suggestions.

13. To add keywords:
   A. Click the relevant button.
   B. A pop-up will be enabled. Search for the keyword using the search bar or use the expanding list and click on the small arrows on the left.
NOTE

- To delete a keyword, click on the minus sign.

You may enter information into the Free keywords field relevant to the keyword.

The IP and Contracts Information section will be completed by the RS Contracts Team.

14. Once you have completed the application and uploaded your documents, you are ready to submit your draft application for pre-approval.

**Send to pre-approval**

A. Hover over the grey area at the footer of the window to expand the application approval route.

B. Click **Send to pre-approval**.

C. Click **Send to pre-approval**.
DECLARE CONFLICT OF INTEREST

When a person who is involved in a funding application (either as an applicant and/or an approver) has a conflict of interest of any type (e.g., including but not limited to being both an applicant and approver, having a familial relationship with an applicant, having a financial interest in an organisation associated with the application or outcome, etc), the individual must declare that conflict of interest in the application.

- Using the text “I have a conflict of interest with this application because…” and adding an explanation of the conflict of interest.
- For an applicant, this is declared in the History and Comments field before sending the application for approval.
- For an approver (HoD and ADR), the conflict of interest is recorded in the comment field appearing in the approving/returning pop-up window of the application (See step 8 in this QRG). This comment will later be automatically saved and logged in the History and Comment section. (Note that the HoDs and ADRs can only add this when the application is currently with them in the approval workflow. If the application is approved/returned to the applicant, the comment field will disappear and the HoD/ADR will need to wait until it is resent to them for approval before they can add more comments).
- The HoD/ADR then approves or returns the application for further editing and the application progresses through the workflow process as usual.

HANDY HINTS & TIPS

- You can continue to work on your application after it has been submitted for pre-approval.
- Once an application has progressed to the next stage in the workflow and is sent for internal approval, you will no longer be able to edit your application.
- If you click “Save” at any stage, it will save the changes you made and close the window. You will need to open the record again to complete other tasks.
- Always save your entered data. There is no automatic saving in the system.
- Enable pop-ups within your preferred internet browser.
- Close all pop-ups and your web browser when your session is finished.

For additional help:

+61 2 9850-HELP (4357)  rms.support@mq.edu.au  Log a OneHelp ticket