

JROC Quick Guide

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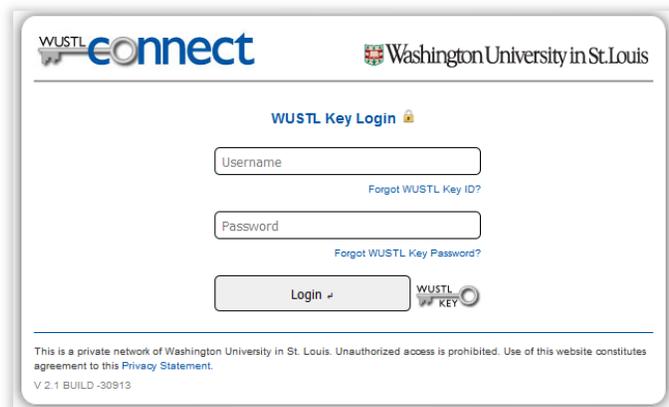
What is RMS?

There are three system modules associated with proposal submission, tracking and award activities in the RMS system:

1. Proposal Development (PD): This module provides a user the ability to create and submit proposals. A copy of the PD record is automatically created in the PT module for use of tracking all activities associated with that record after submission to the agency.
2. Proposal Tracking (PT): This module supports all activities (i.e. JIT, decline, award) which occur after a proposal has been submitted to a sponsoring agency. PT houses a copy of the PD record submitted to the sponsor. PT is also separately used by the Joint Research Office for Contracts (JROC) for managing contracts. If awarded, the PT module will also house pertinent information about your award, including the award budget.
3. Award Tracking (AT): This module is used to capture award increment statuses. An award increment is any document received at award, and includes Project Activation, Award Notices (original and revised), No Cost Extension, etc.

How to Access the RMS system

To access the system go to <https://rms.wustl.edu/>. Enter your WUSTL key user name and password.

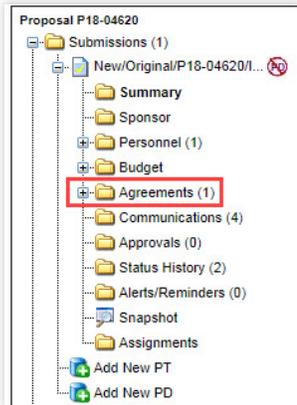


Once you have logged in, you will see your Home page. The set-up of your Home page will reflect your role in the system and how you have configured your portal.

How to Find and Open an Agreement

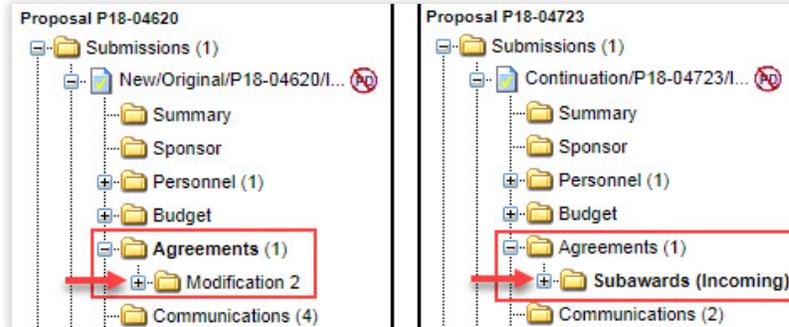
Using the Quick Find field on your Home page is the quickest way to search for an agreement. Enter the Last Name, Project Number, Project Title, or Sponsor Name in the field and click the magnifying glass.

In “Records Found,” move your cursor over the red record number to show the hover menu. Move your cursor down to “**Proposal Tracking**,” then click “**Edit**.” This will open the record in the Proposal Tracking module.



In the left-side navigation, click the “**Agreements**” folder. JROC will use this folder to track all agreements under negotiation by JROC whether or not a PD Record is associated with the agreement. Unfunded agreements are entered here as well.

Depending on the Agreement Type (Subawards, Modification, etc.) there will be a sub-folder listed. Click the sub-folder to open the agreement.



Agreement Status History

The Agreement Status History section includes the current status of the agreement (e.g., pending intake, in signature process, etc.). The agreement status of “Fully Executed” is the final status.

Edit Agreements/Contracts

Agreement Type: Modification 2 | Agreement From: | Agreement To: | Date Signed: | Current Status: Fully Executed

Institution Name: | Second Party ID: 08420416169

Agreement Conditions:

Agreement Status History

Agreement Status: Fully Executed | Agreement Status History Date: 25-Jun-2018

Agreement Status History Comments:

You have 1000 characters left.

Date	Status	Recorded Date	Recorded By	Comments	Delete
24-May-2018	Fully Executed	05-Jun-2018 10:13:02 AM	Meryl Alison Kossmeyer		<input type="button" value="⋮"/>
24-May-2018	Signed/Approved by JROC Pending Full Execution	05-Jun-2018 10:12:49 AM	Meryl Alison Kossmeyer		<input type="button" value="⋮"/>
24-May-2018	In Signature Process	05-Jun-2018 10:12:33 AM	Meryl Alison Kossmeyer		<input type="button" value="⋮"/>
23-May-2018	Assigned to Negotiator for Initial Review	04-Jun-2018 11:23:05 AM	Courtney Maue		<input type="button" value="⋮"/>
22-May-2018	Initial Contact/Pending Intake	04-Jun-2018 11:22:07 AM	Courtney Maue	PI notification	<input type="button" value="⋮"/>

Document Summary
No Documents Found

Assignments

Click the “Assignments” folder to view who is the contract negotiator that is responsible for the agreement.

Assigned Date	Assigned To	Duration	Instructions	Completed Date	Completed By
24-May-2018 10:13:00 AM	Meryl Kossmeyer Alison	0 days	N/A	24-May-2018 10:13:00 AM	Meryl Kossmeyer Alison
24-May-2018 10:12:00 AM	Meryl Kossmeyer Alison	0 days	N/A	24-May-2018 10:12:00 AM	Meryl Kossmeyer Alison
24-May-2018 10:12:00 AM	Meryl Kossmeyer Alison	0 days	N/A	24-May-2018 10:12:00 AM	Meryl Kossmeyer Alison
23-May-2018 11:23:00 AM	Courtney Maue	0 days	N/A	23-May-2018 11:23:00 AM	Courtney Maue

Fully Executed Agreement

Upon full execution of a subaward or sponsored research agreement, the agreement will be uploaded to the Executed Agreements subfolder under the Attachments folder.

Click the PDF icon to view, download, or print the agreement.

Name	Category	View Latest	History	Upload	Versions	Last Updated	Delete
FE Bucholz Uillinois 084204-16169.mod2	Other				1	05-Jun-2018 10:13:34 AM	

Name	Category	View Latest	History	Upload	Versions	Last Updated	Delete
FE Bucholz Uillinois 084204-16169.mod2	Other				1	05-Jun-2018 10:13:34 AM	