Financial Module @ Procurement, Misc Advancement & Misc Claim User Manual

RESEARCH MANAGEMENT SYSTEM VERSION 2 (RMS V2)

This document contains the Researcher User Manual for the IIUM Research Management System.

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Introduction

Purpose

This document covers how to use the Research Management System Version 2 (RMSV2) - Researcher User Manual for Procurement Module

Target Audience

The target audiences for this User Manual include:-
1. Researchers
2. Research Management Center Officers
3. Head of Research

Login

In a web browser, enter the following address:-

https://rmsv2.iium.edu.my

In the screen, enter your valid HURIS username
and password, Then click the LOGIN icon as depicted on screen.
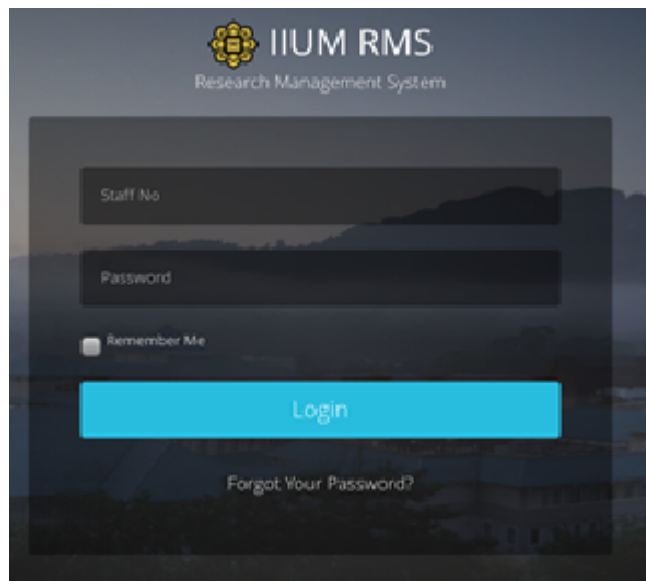
Researcher - Request Submission

Procurement

To make a procurement for the project, follow the steps below:-

Step 1. Click on <u>Request Submission</u> on the side menu and select <u>Procurement</u> from the finance drop down.
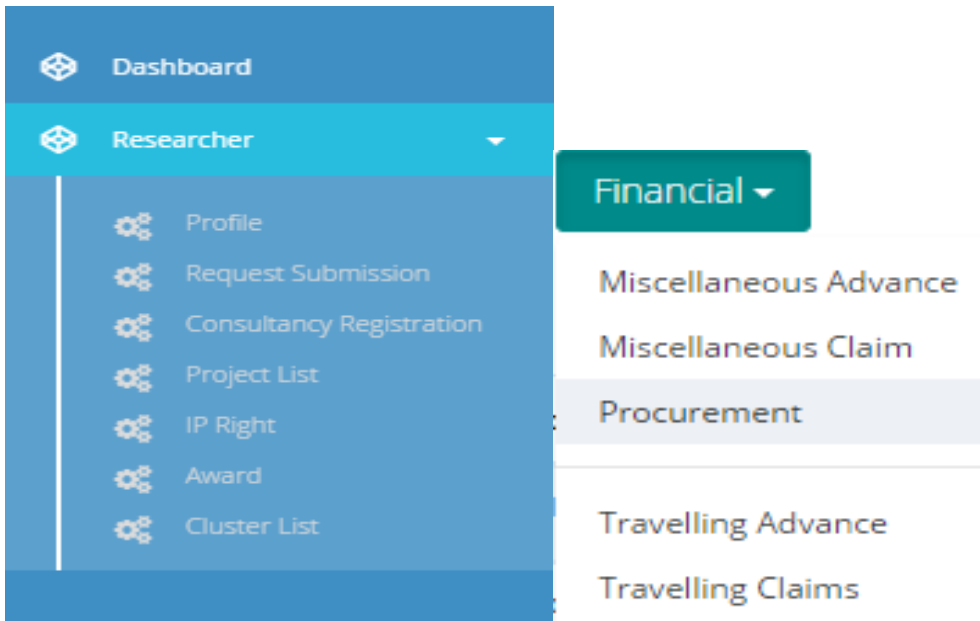
Step 2. Select the research project and search for vendor.

Procurement Form

Procurement Form

Identification

Name Of Applicant

Staff No

Kulliyah

Phone No

Salary Grade

Project Selection

Research Project No

Please select Project Code ▼

Project Title

Kulliyyah

Vendor

Minimum 2 characters   ✕   🔍   Please enter search key ▼

* Note:Please refer to **Finance Division** if the vendor name did not appear in Vendor field, to be reactivate or register new vendor.

- Click **Create** to proceed.
- Your application will be saved as draft
- You can *edit* or *delete* your draft application from *Request Submission.*

Step 3. Click Next **button or** previous **at the bottom of the page button to navigate through the application form.**

Procurement Form

Success! Your Purchase Request has been saved as draft ✕

Procurement Form

1	Identification	2	Detail of Procurement	3	List of Quotations	4	Declaration
	Information about the applicant		Detail entry for each vote		Quotation Uploading		Applicant Declaration

Identification

Name Of Applicant

Staff No

Kulliyah

Phone No

Salary Grade

previous   Next

- Click next to proceed.

Step 4. Add item for Procurement Detail

- Click ![Add Item] button to add more item.
- *No need to click GST checkbox.*

- Select item code, KPT vote and IIUM code.
- Click ![Add] button to add item.

- Fill in item description, quantity and unit price.
- Click ![trash] button to remove items.
- Click next to proceed.

Step 5. Upload document(s)

- Browse and upload all required document(s)
  - *Notes:*
    - The researcher needs to upload **1 quotation** if the amount of Procurement is **less than RM20,000.00**

    - The researcher needs to upload the following documents if the amount of Procurement is **more than RM20,000.00**
      - *An approved proposal*
      - *At least 3 quotations*
      - *Letter of invitation for quotation (if quotations received are less than 3)*
      - *A technical evaluation form*
      - *A copy of the appointment of the technical evaluation committee members*
      - *The integrity pact - Appendix A, B, C, F and G*

    - The researcher needs to upload the following documents if the amount of Procurement is **more than RM50,000.00**
      - *An approved proposal*
      - *At least 5 quotations*
      - *A copy of the letter(s) of calling for quotations*
      - *An opening quotation form*
      - *A technical evaluation form*
      - *Letter of appointment as members of Opening Quotation and Technical Evaluation committees.*
      - *The integrity pact - Appendix A, B, C, F and G*

    - **Please refer to your KCDIO finance representative for the preparation of the proposal.**

- Click **[+ Add File]** button to add more fields and browse file to be uploaded.
- Click **[🗑]** button to remove any files.
- Click next to proceed.

Procurement Form

Procurement Form		

1 Identification	2 Detail of Procurement	3 List of Quotations	4 Declaration
Information about the applicant	Detail entry for each vote	Quotation Uploading	Applicant Declaration

List of Attachment

+ Add File * Note: Minimum 1 file, 1MB/file and file type of image, words and pdf is allowed

* Notes:

1. The researcher needs to upload **1 quotation** if the amount of Procurement is **less than RM20,000**

2. The researcher needs to upload the following documents if the amount of Procurement is **more than RM20,000**.

    i. An approved proposal.
    ii. At least 3 quotations.
    iii. Letter of invitation *(if quotation are less than 3)*.
    iv. A technical evaluation form.
    v. A copy of the appointment of the technical evaluation committee members.
    vi. The integrity pact.

3. The researcher needs to upload the following documents if the amount of Procurement is **more than RM50,000**

    i. An approved proposal.
    ii. At least 5 quotations.
    iii. A copy of the letter(s) of calling for quotations.
    iv. An opening quotation form.
    v. A technical evaluation form.
    vi. Letter of appointment as members of Opening Quotation and Technical Evaluation committees.
    vii. The integrity pact.

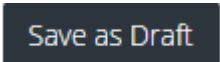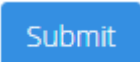4. Please refer to your KCDIO finance representative for the preparation of the proposal.

Description of File	Attachment Upload (Kindly attach each document separately)
Proposal	Choose File No file chosen

Step 6. Save as Draft or Submit Application

- Click **Save as Draft** button to save application and edit later.
- Check on checklist like shown below.
- Click **Submit** button to submit application for approval process.

Procurement Form

Success! Your Purchase Request has been saved as draft ✕

Procurement Form

① Identification	② Detail of Procurement	③ List of Quotations	④ Declaration
Information about the applicant	Detail entry for each vote	Quotation Uploading	Applicant Declaration

Declaration

☐ I hereby declare that all information stated here are accurate. RMC has the right to reject or to cancel the offer without prior notice if there is any inaccurate information given.
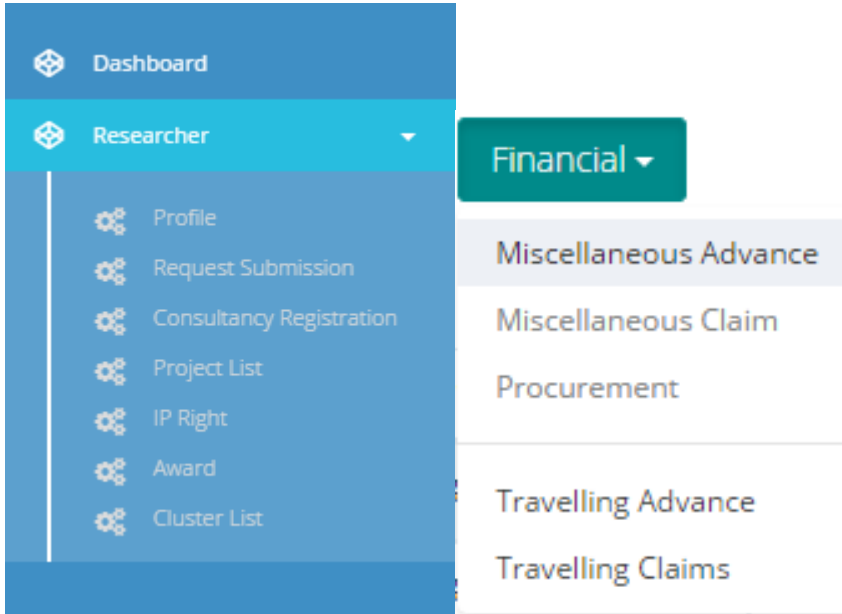
previous   Next

Save as Draft   Submit

Miscellaneous Advance

To apply for miscellaneous advance follow the steps below.

Step 1. Click on <u>Request Submission</u> on the side menu and select <u>Miscellaneous Advance</u> from the finance drop down.

Step 2. Fill in Phone No field and select the research project.
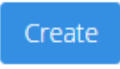
- Please fill in Phone No Field.
- Select project id.
- Click [Create] to proceed.
- Your application will be saved as draft
- You can *edit* or *delete* your draft application from ***Request Submission.***

Step 3. Click [Next] button or [previous] at the bottom of the page button to navigate through the application form.

Research Miscellaneous Advance

Success! Your advance application has been saved as draft ✕

Research Miscellaneous Advance

① Identification	② Detail of Advancement	③ List of Attachments/Details	④ Declaration
Information about the applicant	Detail entry for each vote	Attachment Uploading	Applicant Declaration

Identification

Name Of Applicant

Staff No

Kulliyyah

Phone No

Salary Grade

previous   Next

- Click next to proceed.

Step 4. Add item for Advance Detail

- Click [⊕ Add Item] button to add more item.
- Select kpt vote.
- Fill in description and amount.
- Click [🗑] button to remove items.
- Click next to proceed.

Advance Detail

⊕ Add Item

#	Vote Code	Description	Amount	
1	Please select kpt vote ▾	Description	0	🗑
		Total Amount	**RM 0.00**	

Step 5. Upload document(s)

Research Miscellaneous Advance

Success! Your advance application has been saved as draft ✕

Research Miscellaneous Advance

1 Identification Information about the applicant	2 Detail of Advancement Detail entry for each vote	3 List of Attachments/Details Attachment Uploading	4 Declaration Applicant Declaration

List of Attachment

+ Add File   * Note: Minimum 1 file, 1MB/file and file type of image, words and pdf is allowed

Description of File   **Attachment Upload (Kindly attach each document separately)**

previous   Next

- Browse and upload all required document(s)
- Click [+ Add File] button to add more fields and browse file to be uploaded.
- Click [🗑] button to remove any files.
- Click next to proceed.

Step 6. Save as Draft or Submit Application
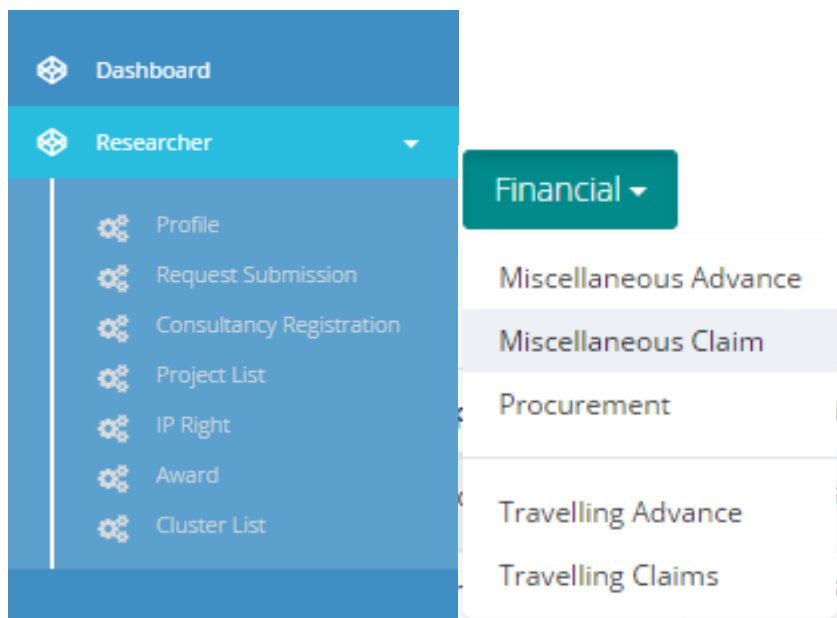

- Click [Save as Draft] button to save application and edit later.
- Check on checklist like shown below.

- Click [Submit] button to submit application for approval process.

Miscellaneous Claim

To apply for miscellaneous claim, follow the steps below:-

Step 1. Click on <u>Request Submission</u> on the side menu and select <u>Miscellaneous Claim</u> from the finance drop down.

Step 2. Select the research project and Outstanding Advances for the project (if any).

- Fill in or update phone no at phone no field.

Research Miscellaneous Claim

Research Miscellaneous Claim

Identification

Name Of Applicant

Staff No

Kulliyyah

Phone No

Salary Grade

Project Selection

Research Project No

Please select Project Code

Project Title

Kulliyyah

Advances Outstanding for the project

Please select advance to contra

Total Advances : RM 0.00 and Total Claims = RM 0.00

Create

- Click [Create] to proceed.
- Your application will be saved as draft
- You can *edit* or *delete* your draft application from *Request Submission.*

Step 3. Click Next **button or** previous **at the bottom of the page button to navigate through the application form.**

- Click next to proceed.

Research Miscellaneous Claim

Success! Your claim form has been saved as draft ✕

Research Miscellaneous Claim

1 Identification	2 Detail of Claims	3 List of Attachments/Details	4 Declaration
Information about the applicant	Detail entry for each vote	Attachment Uploading	Applicant Declaration

Identification

Name Of Applicant
████████████

Staff No
████████████

Kulliyyah
████████████

Phone No
████████████

Salary Grade
████████████

previous   Next

Step 4. Add item for Claim Detail

Claim Detail

➕ Add Item

#	Vote Code	Account Code	Description	Amount
1	Please select kpt vote ▾	▾	Description	0 🗑
			Total Claims	**RM 0.00**

- Click ➕ Add Item button to add more item.
- Select kpt vote.
- Fill in description and amount.

- Click 🗑 button to remove items.
- Click next to proceed.

Step 5. Upload document(s)

Research Miscellaneous Claim

Success! Your claim form has been saved as draft   ✕

Research Miscellaneous Claim   ✎ ↻ ⊝

1 Identification	2 Detail of Claims	3 List of Attachments/Details	4 Declaration
Information about the applicant	Detail entry for each vote	Attachment Uploading	Applicant Declaration

List of Attachment

+ Add File   * Note: Minimum 1 file, 1MB/file and file type of image, words and pdf is allowed

Description of File   **Attachment Upload (Kindly attach each document separately)**

previous   Next

- Browse and upload all required document(s)
- Click **+ Add File** button to add more fields and browse file to be uploaded.
- Click 🗑 button to remove any files.
- Click next to proceed.

Step 6. Save as Draft or Submit Application

- Click ![Save as Draft] button to save application and edit later.
- Check on checklist like shown below.
- Click ![Submit] button to submit application for approval process.