

University of the Philippines

HRIS

Human Resources Information System



HRIS User Manual UP Research Information Module

Author:Cherie Anne R. PascoCreation Date:12 September 2021Last Updated:19 November 2021Document Ref:HRIS User Manual – UP Research Information ModuleVersion:2.0



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial
12 October 2021	Cherie Anne R. Pasco	1.1	 Added descriptions to Project Status options (p.31) Added a note on the submission of research record for approval (p. 40) Added a note on the updating of research record (p.92)
22 November 2021	Cherie Anne R. Pasco	2.0	Added section on Viewing Action History

INTRODUCTION

The UP Research Information Module (UP RIM) is designed for the recording and maintenance of information related to research projects of various academic and research units of the University of the Philippines (UP). This is a response to the need of UP to monitor the status of all of its research projects, which are funded externally or by UP.

The UP Research Information Module (UP RIM) responsibility in the University Information System (UIS) will be provided to research project leaders of UP.

This manual includes the following topics:

- Process Flowchart
- <u>Setting Accessibility Preferences</u>
- Granting Responsibility and Worklist Access to an Authorized Staff
- Saving and Submitting a New Research Record
- Worklist Notification Actions
 - o Research Office Approver: Approve
 - o Accounting Office Approver: Update Accounting Details
 - o Return for Correction
 - o Responding to Return for Correction
 - o <u>Reassign</u>
 - o <u>Reject</u>
- Updating an Approved Research Record
- Closing an Approved Research Record
- Other Worklist Notification Actions in the Closing Workflow
 - Done Finalizing Financial Reports
 - Closeout Report Validated
 - Closed
 - o Completed
- <u>Viewing Action History</u>



PROCESS FLOWCHART







SETTING ACCESSIBILITY PREFERENCES



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Setting Accessibility Preferences (Optional)
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	To allow searching of list-of-values (LOVs) by page instead of by
	scrolling
Data Requirement	Active UIS User Account
Dependencies	None
Scenario	The end user would like to view all the options in an LOV before
	selecting one of multiple values.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

University of the Philippines		Favo	k rites ∨	Settir Pe	₿ Igs ♥ Irsonaliz	 e Page	Logge	ed In As CRP4	sco	? Help	U Logout
University Information System Home Pa	age			Dia	ignostic nage Pr	s roxies					
				Ac	cess Re	quests	6				
Navigator	Worklist										
Personalize			Fu	II List							
LIP Research Information Module	🔟 😂 🕞 🍄 🔻 💷										
	From	Туре	Subject	Sent							
Administrator	There are no notifications in this view.	-respon	d to notific	cations.							

Step 3. On the **UIS Home Page** proceed to the **Settings** icon,

then click the Preferences.

University of the Philippines	î Home	⊗ Navigator v	★ Favorites ♥	Ç Settings ⊌	Logged In As CRPASCO 🕜 U Help Logout
General Preferences					Cancel Reset to Default Apply
Languages					
Current Session Language American English • 1 Default Application Language American English • 1					
Accessibility					
Accessibility Features Screen Reader Optimized Standard Accessibility					
Home Page Style Framework Tree	D				
Page Header Display Style Both Links and Icons Top-level Menu Display Style Icons and Links	<u> </u>				
Forms Launch					

Step 4. On the General Preferences Page, go to the Accessibility Features.

Select Screen Reader Optimized.

Then, click *Apply*.

Expected Result:

A confirmation message will appear that your Accessibility Features was updated successfully.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

Confirmation

Updated successfully.

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Granting Responsibility and Worklist Access to an Authorized Staff



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Granting Responsibility and Worklist Access to An Authorized Staff
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	To provide a project staff access to the project leader's worklist and responsibility
Data Requirement	Active UIS accounts (Project Leader and Project Staff)
Dependencies	None
Scenario	The project leader or an authorized representative will enter and save initial research information to be updated and submitted later.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)



Step 3. From UIS Home Page proceed to Settings,

then click Manage Proxies.

University of the R	Philippines	î Home	⊘ Navigator ♥	★ Favorites ♥	ÇÇ Settings ♥	Logged In As CRPAS	co ? _{Help}	U Logout	Step 4. Proxy Configuration page will appear. Then, click Add Proxy.
Proxy Configuration Manage the people that can access your	account and act on your behal	f.							
Add Proxy Run Proxy Report	2254								
Details Last Name	First Name	User	Name	Start D	ate	End Date	Update		
no rosurs roups.									

University of the Philippines	n S Home Navigator	r v Favorites v Settings v	Logged In As CRPASCO 7 Help	U Cogout Step 5. On the Add Proxy Region, enter the required information.
Information The current responsibility context has been switched to: Alert Manager				Fill out the User Name and Active From fields.
Add People	Switch Re	Alert Manager	- Submit Can	Then click Submit .
Add Proxy				
* User Name JRDELACRUZ Q Notes to Proxy * Active From 11-Sep-2021		li.		
Grant Responsibility Access				
Responsibilities None Selected All				
Grant Worklist Access				
Workflow Item Types None Selected All				

Responsibilities				
O No	one			
Se	lected			
ilable Responsibilities			Selected Responsibilities	
		>		
		Move	UP Research Information Module	
		>>>		
		Move All		
		a		
		Remove		

Step 6. On the Grant Responsibility Access Region, click Selected.

Then, move **UP Research Information Module** from the list of **Available Responsibilities** to the **Selected Responsibilities**.

Note: This feature is not limited to the *UP Research Information responsibility*.

None Selected All			
vailable Item Types AP Invoice Approval Concurrent Manager Message Expenses HR HR Save For Later Requisition UMX Proxy Notification	Move Move All Remove Remove All	Selected Item Types UP Research Information Module Workflow	

Step 7. On the Grant Worklist Access Region, click Selected.

Then, move **UP Research Information Module** from the list of **Available Item Types** to the **Selected Item Types**.

Note: This feature is not limited to the *UP Research Information worklist item type*.

Expected Result:

A confirmation message will appear that changes have been saved successfully.

🔒 Cor	🔓 Confirmation								
Your	Your changes have been saved successfully.								
Proxy	Proxy Configuration								
Manage	Manage the people that can access your account and act on your behalf.								
Add Proxy Run Proxy Report 💢 🌫 🖙 🌞 🗸									
Details	Last Name 🛆	First Name 🛆	User Name 🛆	Start Date	End Date	Update			
•	Dela Cruz	Juan	JRDELACRUZ	11-Sep-2021 00:00:00		1			

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

On the *Home Page header*, the authorized staff the *Switch User icon* will appear.



Switch User Select a user and act as their proxy									
								ser and act as their proxy	witch U
								☆ ▼ 💷	a 2 🕞
Switch Last Name First Name User Name Job Title Phone Email		Email 🛆	Phone	itle	Job Tit	User Name 🛆	First Name 🛆	Last Name 🛆	Switch
Pasco Cherie Anne CRPASCO .						CRPASCO	Cherie Anne	Pasco	0+0

.....

Return to Self

To access the account of the project leader, the authorized staff should click on *Switch User*.

Then, click the **Switch icon** beside the name of the project leader.

This will redirect the staff to the *Navigator* and *Worklist* of the project leader with selected items shown to be accessible.

ሪ

Logout

?

Help

Proxy For &PROXY_USER_NAME CRPASCO

Logged In As JRDELACRUZ

University Information System Home Page

University of the Philippines

Navigator	Worklist	
Personalize		Full List
UP Research Information Module	📜 2 🕞 🔅 🔻 🖩]
	From	Type Subject Sent
UP Research Information Module	There are no notification	ns in this view.
Administrator		

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Saving and Submitting a New Research Record



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Saving and Submitting a New Research Record
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	To register a new research record in the system and saving initial
	information for submission later
Data Requirement	Basic Research Information
Dependencies	Approved research project with funding information
Scenario	The project leader or an authorized representative will enter and
	save initial research information. Then proceed with updating and
	submitting a saved research record.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

University of the Philippines	Page	★ ₿ Favorites ↓ Settings ↓	Logged In As CRPASCO 7 Help	Logout	Step 3. From UIS Home Page proceed to Navigator and choose the UP Research Information Module responsibility.
Navigator	Worklist				Then, click <i>Entry</i> .
Personalize	Image: Second system From There are no notifications in this via Image: Second system Image: Second system </th <th>Type Subject Sent aw. auto-respond to notifications.</th> <th></th> <th></th> <th></th>	Type Subject Sent aw. auto-respond to notifications.			

Advanced Search									
Specify parameters and values to	filter th	e data that is dis	olayed	d in your results set.					
Match O All O Any									
Research Sequence No.	is		•1						
Research Title	is		-1						
Type of Research	is		•						
Project Status	is		•						
	Go	Clear	A	dd Another Project Status	- Add				
Add 🐹 🎜 🖙 🍄 🗸									
Add 💢 ぞ 🖻 🌣 ▼		Research Titl	е	Type of Research	Project Status	Approval Status	View	Update	Close

Step 4. On the *Summary Page*, click *Add.*

Research	n Information Module - Red	quest	Page	Si	ave for Later <u>N</u> ext Cancel	Step 5. The <i>Request Page</i> will open.
Basic Info	Fiscal Info					Fill out research information
	Research Sequence No	000000	00067			The out research mormation.
	* Assignment Position		Q,			Then aligh Save for Later
	* Type of Research		٩,			Then, click Save for Later.
	Type of Research (Specifics)					Note: Only a part of the screen is
	* Title of Research					shown here. The complete list of
	Title of Research (Line 2)					field names is shown on the
	Title of Research (Line 3)					following pages.
	* Brief Description					
					lu lu	
	* Main Area of Interest	1 2	🗜 📑 🍄 🔻 🖣 Previous 1-10 of 62 🔄 Next 10 🕨			
		Select	Main Area of Interest			
			Agricultural Sciences			
			Architecture			
			Art Studies			
			Biological Sciences			
			Business Administration			
			Chemistry			
			Clothing and Textile Technology			
			Commerce, Management, Tourism and Services			
			Earth Sciences			
			Economics			
			Previous 1-10 of 62 Vext 10			

Basic Info Tab Field Name	Description	Remarks
Research Sequence No.	Research record identifier	Automatic upon creation of
Assignment Position	Select the applicable HR Assignment / Position	Required List of Values (LOV)
Type of Research	Select the appropriate research type	Required List of Values (LOV)
Type of Research (Specifics)	Additional information on the type of research	Optional Free text
Title of Research Title of Research (Line 2) Title of Research (Line 3)	Research Title as indicated in the MOA / Contract	Required Free text
Brief Description	A short description of the research	Required Free text
Main Area of Interest	If the "Others" option is selected, a field to specify a different main area of interest may be entered.	Required List of Values (LOV) Allows multiple responses
Project Impact		Required List of Values (LOV) Allows multiple responses
Project Impact	Additional information on the project impact	Required Free text
Project Leader	Name of the project leader as indicated in the MOA / Contract	Default value: Name of UIS Account Owner

Basic Info Tab Field Name	Description	Remarks
Team Members (UP) - Full Name - Position - End Date - Organization - Project Role	Names and details of team members who are UP employees or UP contractuals	Optional
Team Members (Non-UP) - Full Name - Position - End Date - Unit - Project Role	Names and details of team members who are not considered as UP employees	Required Free text
MOA / Contract Start date	Start date of the research as indicated in the MOA / Contract	Required Date
MOA / Contract End date	End date of the research as indicated in the MOA / Contract	Required Date
Actual End date	To be determined by the Research Office	To be filled-out by Research Office

Basic Info Tab Field Name	Description	Remarks
Project Status	Indicator of the progress of the project	Required Options: 1. Execution and Control (for ongoing projects) 2. Incomplete (project implementation ended, pending submission of terminal report) 3. For Closeout 4. Final Financial Reports Provided 5. Closeout Report Validated 6. Closed 7. Completed 8. Terminated
Date Updated	Last record update date	Automatic
Updated by	Name of the account owner	Automatic
Project Remarks	To be used as reference by approvers	Optional Free text
Sustainable Development		Required
Goal/s Addressed		Allows multiple responses
Number of Mentored Students - BS / MS / PhD		Optional

Fiscal Info Tab Field Name	Description	Remarks
Organization	UP Constituent Unit or Level 1 Unit assigned to monitor / control research project funds	Required List of Values (LOV) Determines the workflow (approval path)
Responsibility Center	Name of the cost center / unit / office hosting the research project	Required List of Values (LOV)
Collaborating Agency	Name of the collaborating agency as indicated in the MOA / Contract	Optional Free Text
Funding - Funding Source - Funding Description - Start Date - End Date - Currency - Amount - Total Amount Funding Agency SP Code	Research funding information - GF / RF / TF - To be determined by accounting - Period covered by the fund - Period covered by the fund - Currency - Amount - Total Amount Internal or external source of funds UIS code assigned to the project / trust fund / account	Optional - List of Values (LOV) - Free Text - Date - Date - List of Values (LOV) - Numeric - Numeric; Automatic Required Free text To be updated by Accounting
Fund Controller	Name of personnel assigned to monitor research project funds	To be updated by Accounting
FAR Excluded	Indicator of inclusion or exclusion from Financial Accountability Reports	To be updated by Accounting
Project Milestones - Milestone - % Completion - Budget Released (date) - Remarks	Research project milestones as indicated in the MOA / Contrat and progress indicator	Required

Research Information	n Module - Summa	ary Page						
Advanced Search								
Specify parameters and values to	filter the data that is display	red in your results set.						
Match O All O Any								
Research Sequence No	is 🔹							
Research Title	is 🗾							
Type of Research	is 🗾							
Project Status	is 🗾							
	Go Clear	Add Another Project Status	- Add					
Add 💢 🎜 🖻 🍄 🔻								
Research Sequence No	Research Title	Type of Research	Project Status	Approval Status	View	Update	Close	
00000021				Saved For Later		1		
00000028	Research CP 1	Quantitative Research	Execution and Control	Saved For Later		A		
						-		

Step 6. On the *Summary Page,* the *Approval Status* of the research record will indicate *Saved for Later.*

Click **Update** to proceed with entering research details.

Research Information Module - Re	quest	Page	Save for Later Next Cancel	Step 7. Continue filling-out the Request Page.	
Basic Info Fiscal Info				Once dans click Nortto	
Research Sequence No	00000	00067		Droceed to the Paview Pag	
* Assignment Position		٩,		proceed to the Neview I ag	
* Type of Research		٩			
Type of Research (Specifics)					
			li.		
* Title of Research					
Title of Research (Line 2)					
Title of Research (Line 3)					
* Brief Description			1.		
* Main Area of Interest	12	🗜 🔄 🔅 👻 🖣 Previous 1-10 of 62 🔄 Next 10 🕨			
	Select	Main Area of Interest			
		Agricultural Sciences			
		Architecture			
		Art Studies			
		Biological Sciences			
		Business Administration			
		Chemistry			
		Clothing and Textile Technology			
		Commerce, Management, Tourism and Services			
		Earth Sciences			
		Economics			

Research Information Module - Review	Step 8. Check the saved					
				Cance <u>i</u> Bac <u>k</u>	Submit	
Details						Page.
Basic Info						
Research Sequence No	00000028					
Assignment Position	Junior ICT Manager					
Type of Research	Quantitative Research					
Type of Research (Specifics)	research specifics CP 1					
Title of Research	Research CP 1					
Title of Research (Line 2)	Line 2 CP 1					
Title of Research (Line 3)	Line 3 CP 1					
Brief Description	description CP 1					
Main Area of Interest	🏛 🎜 🖻 🌞 🗸					
			•			
	Fisheries					
	Environmental Sciences					
Project Impact	🕱 🔁 🖻 🥸 🗸					
	Economic Impact					
	Environmental Impact					



Step 9. Go to the *Attachments Region* and click *Add*.
Add Attachmen	t	×
Attachment Type Title Description	File I	
Category File	Miscellaneous Browse No file selected.	
	Cancel Add Another App	ly

Add Attachmen	t		×
Attachment Type	File •		
Title	Test Attach CP 1 -1		
Description			
0	Mineelleneeue		111
Category	Miscellaneous		
File	Browse No fi	le selected.	
	Ca	ncel Add Another (Apply

Step 10. On the Add Attachment Window, click on Browse and select the file to be attached.

Then, click Apply.

The file has been successfully attached once the status beside the *Browse* button becomes *No file selected.*

Attachment/s

Attachments View Attachments Add...

Attachments						X
🔓 Confirmat	tion					w.
Test Attach CP 1 -1	attachment has	been added	l successfully.			
				۲	Previous	Next 📀
Title	Description	Туре	Details	Category	Update	Delete
Test Attach CP 1 -1		File	TEST Document.pdf	Miscellaneous	1	đ
				0	Previous	Next 🔊

To verify, click *View Attachments*.

The confirmation message along with the attachment table will be visible.

Action History

1	; 🖻 🥸 🗕				
Line No	Name	Position	Organization	Action	Date Note
1	Pasco, Ms. Cherie Anne Rivera	Junior ICT Manager	UPS UP Information Technology Development Center	Submit	
2	Dimalanta, Prof. Carla Besa	Research Office Approver	UP Research Office	Pending	
3	Sanchez, Ms. Susan Cruzat	Accounting Office Approver	UP Accounting Office	For Accounting Info Update	

Step 10. On the *Review Page*, review the *Action History*, the table will show the workflow.

Then, click Submit.

Cancel Back Submit

Expected Result:

A message will appear stating that the research has been submitted for approval.

Assignment Desition Lunior ICT Manager	
(i) Information	
Your Research CP 1 has been submitted for approval. Thank you.	
	Ok

Note: Once a research record has been submitted for approval, the **Update** and **Close** options will not be available.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Worklist Notification Action: APPROVE



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Worklist Notification Action: Approve
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For approving newly submitted or updated research records
Data Requirement	Supporting documents / attachments
Dependencies	Submitted research record in the UP RIM
Scenario	Approver receives a notification from UIS for a newly submitted or updated research record



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
		-	Full List (1)
From △	5 🕸 ▼ 🖩 Type △	Subject 🔺	
	UP		
, (Research Information Module Workflow	Research Information Module - Research CP 1 submitted by Pasco, Ms. Cherie Anne your Approval	needs

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

Ms. Ch	ierie Anne	and requires your	approval	Approve	Reject	Return for Correction	Reassign
From							
То							
Sent	11-Sep-2021 09:19:35						
ID	6365078						
Details							
		Research Sequence No	00000028				
		Assignment Position	Junior ICT Manager				
		Type of Research	Quantitative Research		7		
		Type of Research (Specifics)	research specifics CP 1				
		Title of Research	Research CP 1				
		Title of Research (Line 2)	Line 2 CP 1				
		Title of Research (Line 3)	Line 3 CP 1				
		Brief Description	description CP 1				
		Main Area of Interest	🗎 🎜 🕞 🍄 🗕 💷				
			Fisheries				
			Environmental Sciences				

Step 4. On the *Notification Page*, review the submitted research details and attachments.

If the entries are acceptable, proceed by clicking *Approve*.

Expected Result:

The notification on the approver's worklist will be closed and notification will be sent to the next approver.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

WORNIGL			
		Fu	ll List
🗟 😂 🖻 🌞 🔻 💷			
From	Туре	Subject	Sent
There are no notifications in this view.			

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Accounting Office Approver Worklist Notification Action: UPDATE ACCOUNTING DETAILS



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Accounting Office Approver Worklist Notification Action: Update Accounting Details
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For approving newly submitted research records
Data Requirement	Supporting documents / attachments SP Code generated from LIIS
Dependencies	Research Office approved research record in the UP RIM SP Code requested from ITDC UIS Team
Scenario	Accounting Office Approver receives a notification from UIS for a newly submitted research record



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
		-	Full List (1)
From △	5 🕸 ▼ 🖩 Type △	Subject 🔺	
	UP		
, (Research Information Module Workflow	Research Information Module - Research CP 1 submitted by Pasco, Ms. Cherie Anne your Approval	needs

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

attachments,

13. 01		una requires your	abbiotai	Approve	neject	neturn for Correction	Heassign
From							
То							
Sent ID	11-Sep-2021 09:19:35 6365078						
Details							
A Basic	: Info						
		Research Sequence No	00000028				
		Assignment Position	Junior ICT Manager				
		Type of Research	Quantitative Research		7		
	Ту	pe of Research (Specifics)	research specifics CP 1				
		Title of Research	Research CP 1				
		Title of Research (Line 2)	Line 2 CP 1				
		Title of Research (Line 3)	Line 3 CP 1				
		Brief Description	description CP 1				
		Main Area of Interest	夏254				
			Fisheries				
			Environmental Sciences				

Step 4. On the **Notification Page**, review the submitted research details and

UP Research Information Module File Ref: ITDC – HRIS – UM – UP Research Information Module – 20211122 – v2.0



Step 5. Go to the Related Applications Region.

Then, click on the *Click to update Accounting Details* link.

esearch Information Mode	ule - Request	Page	Switch Res	sponsibility	General Ledger Ac	countant, UPS	-
asic Info Fiscal Info							
	🗐 😂 🕞 🧔 🗸						
	* Constituent Uni	iversity * Responsibil	ity Center				
* Organization	UP System	Service Servic	nation Teg Q				
Collaborating Agency	DOST						
	H H 2 6 4	* - III					
	Funding Source	Funding Description	Start Date E	End Date	Currency	Amount	
Funding	Trust Fund	Tranche 1	01-Sep-2021 👘	31-Dec-2021	🛍 PHP 🛨	4500000	
Total Amount	4,500,000.00						
* Funding Agency	DENR						
SP Code	L						
Fund Controller		⇒ Q					
FAR Excluded	─ Yes						
	 No 	_					
		Ş 🔻 💷					
	* Milestone	* % Completion	Budget Release	d Remark	s		
	Milestone 2	0		Not yet	started		
* Project Milestones	Milestone 1	0		Not yet	started		

Step 6. On the *Request Page*, go to the *Fiscal Info Tab* and update the fields making sure that the following required fields are filled-in:

- Funding Information
- SP Code
- Fund Controller
- FAR Excluded

Once done, click Next.

Research Information Module - Review P	age	Back Update	Step 7. On the <i>Review Page,</i> check if changes have been
Details			captured.
▲ Basic Info			After reviewing and confirming
Research Sequence No Assignment Position Type of Research Type of Research (Specifics) Title of Research Title of Research (Line 2) Title of Research (Line 3) Brief Description Main Area of Interest	00000028 Junior ICT Manager Quantitative Research research Specifics CP 1 Research CP 1 Line 2 CP 1 Line 3 CP 1 description CP 1 2		that all the details are accurate, proceed by clicking Update .
Project Impact	Fisheries Environmental Sciences		



Step 8. A message will appear stating that the Fiscal Info for the research has been updated.

Click **Ok** to proceed.

Expected Result:

The notification on the Accounting Office approver's worklist will be closed.

		Fu	II List
📓 😂 🖻 🌞 🔻 🏢			
From	Туре	Subject	Sent
There are no notifications in this view.			

Also, a notification will be sent to the **project leader** that the research has been approved.

W	or	kl	is	t
---	----	----	----	---

			Full List (1)
🔟 😂	🖻 🔅 🔻		
From 🛆	Туре 🛆	Subject 🛆	Sent 🔻
	UP Research Information Module Workflow	Research Information Module - Research CP 1 has been approved by Accounting Office and has been completed	11-Sep-2021

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.



Worklist Notification Action: RETURN FOR CORRECTION



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Worklist Notification Action: Return for Correction
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For returning submitted research records to the project leader for additional information or corrections
Data Requirement	Supporting documents / attachments
Dependencies	Submitted research record in UP RIM
Scenario	Approver receives a notification from UIS for a submitted research record



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
		_	Full List (1)
X 2 🗆	5 🍄 🔻 💷		
From $ riangleq$	Туре 🛆	Subject 🔺	
	UP		
, (Research Information Module	Research Information Module - Research CP 1 submitted by Pasco, Ms. Cherie Anne your Approval	needs
	Workflow		

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

Ms. Cherie Anne	and requires your	approval	Approve	Reject	Return for Correction	Reassign
From						
То						
Sent 11-Sep-2021 09:19:35						
ID 6365078						
Details						
Basic Info	Research Sequence No	00000028				
	Assignment Position	Junior ICT Manager		*		
-	Type of Research	Quantitative Research				
Тур	e of Research (Specifics)	research specifics GP 1				
	Title of Research (Line 2)	Line 2 CP 1				
	Title of Research (Line 3)	Line 3 CP 1				
	Brief Description	description CP 1				
	Main Area of Interest	🔟 🎜 🕞 🌣 🗕 🏢				
		Fisheries				
		Environmental Sciences				

Step 4. On the **Notification Page**, review the submitted research details and attachments.

If there are necessary changes to be made, go to the **Response Region** and enter a **Note** to indicate the items for correction / update.

Response



ioi onene Anne	and requires your	аррготаг	Approve	Reject	Return for Correction	Reassign
From						
То						
Sent 11-Sep-2021 09	9:19:35					
ID 6365078						
Details						
	Assignment Position	Junior ICT Manager		*		
	Assignment Position	Junior ICT Manager				
	Type of Research	Quantitative Research				
	Type of Research (Specifics)	research specifics CP 1				
	Title of Research	Research CP 1				
	Title of Research (Line 2)	Line 2 CP 1				
	Title of Research (Line 3)	Line 3 CP 1				
	Brief Description	description CP 1				

Step 5. Click *Return for Correction* to proceed.

Expected Result:

The notification on the approver's worklist will be closed.

		Fu	ll List
🕱 😂 🖬 🌣 🔻 💷			
From	Туре	Subject	Sent
There are no notifications in this view.			

Also, a notification will be sent to the **project leader** that the research has been returned for correction.

Worklist

			Full List (1)
🕱 😂 🖻	☆ -		
From 🛆	Туре 🛆	Subject 🛆	Sent 🔻
	UP Research Information Module Workflow	Research Information Module - Research CP 1 has been returned for correction by	11-Sep-2021

<u>STIP Vacation Rules</u> - Redirect or auto-respond to notifications.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Worklist Notification Action: RESPONDING TO RETURN FOR CORRECTION



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Worklist Notification Action: Responding to Return for Correction
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For updating and resubmitting research records to the approver
Data Requirement	Supporting documents / attachments
	Items for updating
Dependencies	Return for Correction notification from an approver
Scenario	Project leader receives a notification from UIS for a research record
	returned for correction by an approver. Project will update the
	research record and proceed with resubmission for approval.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
			Full List (1)
X 2 🖻	🔅 🗸		
From 🛆	Туре 🛆	Subject	Sent 🔻
	UP Research Information Module Workflow	Research Information Module - Research CP 1 has been returned for correction by	11-Sep-2021

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

As. Cherie Anne	and requires your	approval	Approve	Reject	Return for Correction	Reassign
From						
То						
Sent 11-Sep-2021 09:19:35						
ID 6365078						
Details						
Basic Info						
	Research Sequence No	00000028				
	Assignment Position	Junior ICT Manager		•		
	Type of Research	Quantitative Research		á.		
	Type of Research (Specifics)	research specifics CP 1				
	Title of Research	Research CP 1				
	Title of Research (Line 2)	Line 2 CP 1				
	Title of Research (Line 3)	Line 3 CP 1				
	Brief Description	description CP 1				
	Main Area of Interest	ii 2 ⊡ ‡ - III				
		Fisheries				
		Environmental Sciences				

Step 4. On the *Notification Page*, review the submitted research details and attachments.

Action History

k

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Line No	Name	Position	Organization	Action	Date	Note
1	Pasco, Ms. Cherie Anne	Junior ICT Manager	UPS UP Information Technology Development Center	Submit	11-Sep-2021 09:03:38	
2		Research Office Approver	UP Research Office	Return for correction	11-Sep-2021 09:16:14	
3	Pasco, Ms. Cherie Anne	Junior ICT Manager	UPS UP Information Technology Development Center	Resubmit	11-Sep-2021 09:19:35	
4		Research Office Approver	UP Research Office	Return for correction	11-Sep-2021 09:20:17	add attachment 2
5	Pasco, Ms. Cherie Anne	Junior ICT Manager	UPS UP Information Technology Development Center	Pending		
6		Accounting Office Approver	UP Accounting Office	For Accounting Info Update		

Step 5. Go to the *Action History Region* and check the *Note* for the items to be updated indicated by the approver.



Step 6. Go to the **Related Applications Region** and click on the **Click to update details** <u>link</u>.

Research Information Mod	ule - Request	Page	Switch I	Responsibility Aler	t Manager	1	Next
Basic Info							
	🗐 2 🖻 🕸 🗸						
* Organization	* Constituent Univ	ersity * Responsibil	ity Center				
Organization	UP System	Q UPS UP Inform	mation Tec Q				
Collaborating Agency	DOST		*				
	H H 2 5 0						
	Funding Source	Funding Description	Start Date	End Date	Currency	Amount	
Funding	Trust Fund	Tranche 1	01-Sep-2021	31-Dec-2021	🐞 PHP 🚽	4500000	

Step 7. Make the necessary changes on the <u>*Request Page*</u>, then click *Next*.

Research Information Module - Review Page				
Details				
J Basic Info				
Research Sequence No	00000028			
Assignment Position	Junior ICT Manager			
Type of Research	Quantitative Research			
Type of Research (Specifics)	research specifics CP 1			
Title of Research	Research CP 1			
Title of Research (Line 2)	Line 2 CP 1			
Title of Research (Line 3)	Line 3 CP 1			
Brief Description	description CP 1			
Main Area of Interest	🗐 😂 🖻 🕸 🗸	4		
	Fisheries			
	Environmental Sciences			

Step 8. On the *Review Page,* go to the *Attachment/s Region* if it is necessary to add attachments.



Research Information Module - Review Page Back Upda				Step 9. Proceed by clicking Update.
Details				•
✓ Basic Info				
Research Sequence No	00000028			
Assignment Position	Junior ICT Manager			
Type of Research	Quantitative Research			
Type of Research (Specifics)	research specifics CP 1			
Title of Research	Research CP 1			
Title of Research (Line 2)	Line 2 CP 1			
Title of Research (Line 3)	Line 3 CP 1			
Brief Description	description CP 1	•		
Main Area of Interest	🕱 😂 🖻 🕸 🗸	r		
	Fisheries			
	Environmental Sciences			
Information

Your Research Information Module - Research CP 1 has been resubmitted for approval. Thank you.



Step 10. A message will appear stating that the research has been resubmitted for approval.

Click Ok to proceed.

Expected Result:

Worklist

The notification on the project leader's worklist will be closed.

		Fu	ll List
🗎 😂 🖻 🌣 🔻 🏢			
From	Туре	Subject	Sent
There are no notifications in this view.			

Also, a notification will be sent to the **approver** that the research has been corrected.

 Image: Constraint of the second of the se

STIP Vacation Rules - Redirect or auto-respond to notifications.

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Worklist Notification Action: REASSIGN



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Worklist Notification Action: Reassign
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For delegating a response to a worklist notification
Data Requirement	None
Dependencies	Submitted research in UP RIM
Scenario	Approver receives a notification from UIS for a research record submission. Approver decides to delegate his/her response to another personnel.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
			Full List (1)
X 2 🛛	5 🌣 🔻		
From 🛆	Туре 🛆	Subject 🛆	
(UP Research Inform Module Workflow	Research Information Module - Research CP 3 submitted by Pasco, Ms. Cherie Anne	needs yo

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

University Information System Home Page > Research Information Module - Research CP 3 needs your Approval	3 submitted by Pasco, Ms. Cherie Anne	Updated Fiscal Info Reassign	Step 4. On the <i>Notification</i> <i>Page</i> , review the submitted research details and
From To Sent 12-Sep-2021 15:30:30 ID 6365176			attachments . Click Reassign to delegate your response.
Details			
Basic Info			
Research Sequence No	00000034		
Assignment Position	Junior ICT Manager		
Type of Research Type of Research (Specifics)	Creative Works		
Title of Research	Research CP 3		
Title of Research (Line 2)	*		
Title of Research (Line 3)			
Brief Description	description CP 3		
Main Area of Interest	夏2500		
	Art Studies		

University Inform	mation System Home Page > Notification Details > Notification: Research Information Module - Research CP 3 submitted by Pasco, Ms. Cherie		
Anne	needs your Approval	Cancel	Sub <u>m</u> it
Use 'Delegate' to * Indicates requ	to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete or quired fieldfor that notification.	wnership of and res	ponsibility
* Assignee	All Employees and Users		
	O Delegate your response		
	Transfer notification ownership		
Comments	5		

Step 5. On the *Reassign Notification Page*, select the *Assignee* and enter your *Comments*.

Then, click on Submit.

Expected Result:

The notification on the **approver's** worklist will be closed.

		Fu	ll List
🗎 😂 🖻 🌞 🔻 💷			
From	Туре	Subject	Sent
There are no notifications in this view.			

Also, a notification will be sent to the **new approver**.

Worklist

			Full List (1)
🗮 😂 🕞	🔅 🔻 💷		
From 🛆	Туре 🛆	Subject 🛆	Sent 🔻
	UP Research Information Module Workflow	Research Information Module - Research CP 3 submitted by Pasco, Ms. Cherie Anne needs your Approval	12-Sep-2021

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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Worklist Notification Action: REJECT



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Worklist Notification Action: Reject
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For rejecting a new research submission or an update to a research record
Data Requirement	None
Dependencies	Submitted research in UP RIM
Scenario	Approver receives a notification from UIS for a research record submission / update. Approver decides to reject the new research record or reject the update made to a previously approved research record.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
			Full List (1)
X 2 🖻	☆ -		
From 🛆	Туре 🛆	Subject 🛆	Sent 🔻
	UP Research Information Module Workflow	Research Information Module - Research CP 1 has been returned for correction by	11-Sep-2021

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.

vis. Ch	erie Anne	and requires your	approval	Approve	Reject	Return for Correction	Reassign
From							
То							
Sent	11-Sep-2021 09:19:35						
ID	6365078						
Details							
		Research Sequence No Assignment Position	000000028 Junior ICT Manager				
		Assignment Position	Junior ICT Manager		•		
		Type of Research	Quantitative Research				
	1	ype of Research (Specifics)	Research Specifics CP 1				
		Title of Research (Line 2)	Line 2 CP 1				
		Title of Research (Line 2)	Line 3 CP 1				
		Brief Description	description CP 1				
		Main Area of Interest	1 2 5 0 · m				
			Fasiles and all Oslasses				

Step 4. On the *Notification Page*, review the submitted research details and attachments.

If the newly submitted research record or the changes made to an existing research record are unacceptable, click *Reject*.

Expected Result:

The notification on the approver's worklist will be closed.

		Fu	ll List
🛒 😂 🖻 🌞 🔻 🏢			
From	Туре	Subject	Sent
There are no notifications in this view.			

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

Also, a notification will be sent to the **project leader** that the research has been rejected.

NOTE:

- **New submissions:** When the notification is rejected, the research record will no longer be updatable.
- **Update submissions:** When the notification is rejected, the research record will appear as it was previously approved and may still be updated.

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UPDATING AN APPROVED RESEARCH RECORD



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Updating an Approved Research Record
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For updating an existing research record
Data Requirement	None
Dependencies	Submitted and approved research in UP RIM
Scenario	Project leader adds new research information and submits the changes for approval.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

University of the Philippines	Page	★ Favorites ♥ Settings ♥	Logged In As CRPASCO ? Help	U Logout	Step 3. From UIS Home Page proceed to Navigator and choose the UP Research Information Module responsibility.
Navigator	Worklist				Then, click <i>Entry</i> .
Personalize	Image: Constraint of the second se	Type Subject Sent view. Image: sent sent sent sent sent sent sent sent			

Research Information	n Module - Sum	mary Page					
Advanced Search							
Specify parameters and values to	filter the data that is disp	layed in your results set.					
Match							
Research Sequence No	is	•					
Research Title	is	•					
Type of Research	is	•					
Project Status	is	•					
	Go Clear	Add Another Project Status	Add				
Add 💢 🎜 🖻 🔅 🔻							
Research Sequence No	Research Title	Type of Research	Project Status	Approval Status	View	Update	Close
00000021				Saved For Later		1	
00000028	Research CP 1	Quantitative Research	Execution and Control	Approved		1	
000000001	Bacaarah CB 2	Creative Works	Execution and Control	Approved		1	1000

Step 4. On the *Summary Page* make sure that the research record to be updated is already *Approved*.

You may click the *View* icon to review the current research record.

To proceed with updating research information, click the **Update** icon.

Note: Research records with approval status of *For Approval* may not be updated.

esearch	Information Module - Red	quest Page	Next Cano
Basic Info	Fiscal Info		
	Research Sequence No	000000028	
	* Assignment Position	Junior ICT Manager Q	
	* Type of Research	Quantitative Research Q	
	Type of Research (Specifics)	research specifics CP 1	
	* Title of Research	Research CP 1	
	Title of Research (Line 2)	Line 2 CP 1	
	Title of Research (Line 3)	Line 3 CP 1	
	* Brief Description	description CP 1	
	* Main Area of Interest	III 2 III 20 4 10 0 62 III Next 10	
		Select Main Area of Interest	
		 Environmental Sciences 	
		✓ Fisheries	
		Veterinary Medicine/Veterinary Science	
		Urban and Regional Planning	
		Tourism	
		Theater and Performing Arts	
		Technology	

Project Remarks	Updated: Team Members (added 2 names)	

Step 5. On the *Request Page*, make the necessary changes.

Note: The following fields may no longer be updated

- Type of Research
- Type of Research Specifics
- Title of Research
- Brief Description
- Main Area of Interest
- Project Impact
- Project Impact Description

On the *Project Remarks* field, make sure to indicate the changes made to the research record.

search Information Module	- Request	Page		<u>N</u> ext Cance
asic Info Fiscal Info				
Research Sequen	ce No 000000	0028		
* Assignment Po	sition Junior I	CT Manager Q		
* Type of Res	earch Quantita	ative Research Q		
Type of Research (Spe	cifics) researc	h specifics CP 1		
* Title of Res	earch Research	ch CP 1	h	
Title of Research (L	ine 2) Line 2 (CP 1		
Title of Research (L	ine 3) Line 3 (CP 1		
* Brief Descr	iption descrip	tion CP 1		
* Main Area of In	terest 💢 😂	Image: Image		
	Select	Main Area of Interest		
	\checkmark	Environmental Sciences		
	\checkmark	Fisheries		
		Veterinary Medicine/Veterinary Science	•	
		Urban and Regional Planning		
		Tourism		
		Theater and Performing Arts		
		Technology		

Step 6. Once done, click Next.

Research Information Module - I	Review Page		Cance <u>I</u>	Bac <u>k</u> Subm	Step 8. The <i>Review Page</i> will open.
Details					Add Attachment/s, if
A Basic Info					necessary.
Research Sequence No	00000028				
Assignment Position	Junior ICT Manager				Then click Submit
Type of Research	Quantitative Research				Then, click Sublin t.
Type of Research (Specifics)	research specifics CP 1				
Title of Research	Research CP 1				
Title of Research (Line 2)	Line 2 CP 1				
Title of Research (Line 3)	Line 3 CP 1	N			
Brief Description	description CP 1				
Main Area of Interest					
	Fisheries				
	Environmental Sciences				
Project Impact	夏25日春 -				
	Economic Impact				
	Environmental Impact				

Information

Your Research CP 1 has been submitted for approval. Thank you.



Step 9. A message will open stating that the research has been submitted for approval.

Click Ok to proceed.

Expected Result:

A notification will be sent to the next approver in the Update Workflow.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.

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CLOSING AN APPROVED RESEARCH RECORD



1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

1.2 Description

Process ID	
Process Name	Closing an Approved Research Record
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	For closing an approved update to a research record
Data Requirement	None
Dependencies	Submitted and approved research in UP RIM
Scenario	Project leader has completed all research activities and would like to proceed to closing the research record.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

University of the Philippines	Page	ravorites ↓ Settings ↓	Logged In As CRPASCO 7 Help	Logout	Step 3. From UIS Home Page proceed to Navigator and choose the UP Research Information Module responsibility.
Navigator	Worklist				Then, click <i>Entry</i> .
Personalize	Image: Second state of the second	Type Subject Sent iew. Image: sent sent sent sent sent sent sent sent			

Research Information	n Module - Summ	ary Page					
Advanced Search							
Specify parameters and values to	filter the data that is display	yed in your results set.					
Match O All O Any							
Research Sequence No	is 🗾						
Research Title	is 🛃						
Type of Research	is 🔹						
Project Status	is 🔹						
	Go Clear	Add Another Project Status	- Add	*			
Add 💢 🎜 🖻 🍄 🔻							
Research Sequence No	Research Title	Type of Research	Project Status	Approval Status	View	Update	Close
00000021				Saved For Later		1	
00000028	Research CP 1	Quantitative Research	Execution and Control	Approved		1	
00000031	Besearch CP 2	Creative Works	Execution and Control	Approved		1	

Step 4. On the *Summary Page* make sure that the research record to be closed is already *Approved*.

You may click the *View* icon to review the current research record.

To proceed with the closing process, click the *Close* icon.

	Electric de la fe					
sasic Info	riscai into					
	Research Sequence N	000000	0028			
	* Assignment Positio	n Junior I	CT Manager Q			
	* Type of Researc	h Quantita	ative Research Q			
	Type of Research (Specific	s) researc	h specifics CP 1			
	* Title of Researc	h Researc	ch CP 1		h	
	Title of Research (Line	2) Line 2 (CP 1			
	Title of Research (Line	B) Line 3 (CP 1			
	* Brief Descriptio	n descrip	tion CP 1			
	* Main Area of Interes	at 📜 😂	🖪 🔅 🗸 🕈 Previous 🛽 1	-10 of 62 🗾 Next 10 🕨	li.	
		Select	Main Area of Interest	:		
		\checkmark	Environmental Sciences			
		\checkmark	Fisheries			
			Veterinary Medicine/Vete	erinary Science	b	
			Urban and Regional Pla	nning		
			Tourism			
			Theater and Performing	Arts		
			Technology			
	*	Proje	ect Status	For Closed	out Q	
	_					

Step 5. On the *Request Page,* make the necessary changes.

Change the **Project Status** to **For Closeout.**

On the *Project Remarks* field, make sure to indicate the changes made to the research record.

search Informa	ation Module - Red	quest l	Page				<u>N</u> ext Cance
asic Info Fiscal Info							
	Research Sequence No	0000000	0028				
	* Assignment Position	Junior IC	CT Manager	Q			
	* Type of Research	Quantita	ative Research	Q			
Ту	pe of Research (Specifics)	research	h specifics CP	1			
	* Title of Research	Researc	ch CP 1			11	
	Title of Research (Line 2)	Line 2 C	CP 1				
	Title of Research (Line 3)	Line 3 C	CP 1				
	* Brief Description	descript	tion CP 1				
	* Main Area of Interest	I 2	📧 🥸 🗸 🕯 P	Previous 1-10 of 62 Vext 10	•		
		Select	Main Area o	of Interest			
		\checkmark	Environmenta	al Sciences			
		\checkmark	Fisheries				
			Veterinary Me	edicine/Veterinary Science		b	
			Urban and Re	egional Planning			
			Tourism				
			Theater and F	Performing Arts			
			Technology				

Step 6. Once done, click Next.

Research Information Module - Review Page Cancel Back Submit					Step 8. The <i>Review Page</i> will open.
Details					Add Attachment/s, if
A Basic Info					necessary.
Research Sequence No	00000028				
Assignment Position	Junior ICT Manager				
Type of Research	Quantitative Research				
Type of Research (Specifics)	research specifics CP 1				
Title of Research	Research CP 1				
Title of Research (Line 2)	Line 2 CP 1				
Title of Research (Line 3)	Line 3 CP 1	h			
Brief Description	description CP 1				
Main Area of Interest	🗐 🈂 🖻 🔅 🗸				
	Fisheries				
	Environmental Sciences				
Project Impact	🗒 😂 🕞 🥸 🗸				
	Economic Impact				
	Environmental Impact				



Action History

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Line No	Name	Position	Organization	Action	Date Note
1	Pasco, Ms. Cherie Anne	Junior ICT Manager	UPS UP Information Technology Development Center	Submit	
2		Research Office Approver	UP Research Office	Pending	
3	t 6	Accounting Office Approver	UP Accounting Office	Pending	
4	4	Accounting Office Approver	UP Accounting Office	Prepare Financial Reports	
5		Accounting Office Approver	UP Accounting Office	Validate Closeout Reports	
6	1	Accounting Office Approver	UP Accounting Office	For Closing	
7		Research Office Approver	UP Research Office	For Completion	

Step 9. Check the Action History Region for the Closing Workflow.

Then, click Submit.

Cancel Back Submit

.

Information

Your Research CP 1 has been submitted for approval. Thank you.



Step 9. A message will open stating that the research has been submitted for approval.

Click Ok to proceed.
Expected Result:

A notification will be sent to the next approver in the Closing Workflow.

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OTHER WORKLIST NOTIFICATION ACTIONS



1. DOCUMENT CONTROL

1.1 Change Record

Date12 September 2021	Author	Version	Change Reference:			
12 September 2021	Cherie Anne R. Pasco	1.0	Initial			

1.2 Description

Process ID	
Process Name	Other Worklist Notification Action
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	Responding to worklist notifications in the Closing Workflow
Data Requirement	None
Dependencies	Submitted research in UP RIM
Scenario	Approver receives a worklist notification during the closing process



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)

Worklist			
			Full List (1)
X 2 🗖	5 🛱 🔻		
From 🛆	Туре 🛆	Subject 🛆	
	UP Research Inform Module Workflow	Research Information Module - Research CP 1 submitted by Pasco, Ms. Cherie Anne	needs you

Step 3. From **UIS Home Page** proceed to **Worklist Region** and click on the notification **Subject**.



Step 4. On the *Notification Page*, review the submitted research details and attachments.

These are the other notification actions that may appear on the *Notification Page*:

- 1. Done Finalizing Financial Report
- 2. Closeout Report Validated
- 3. Closed
- 4. Completed

Note: Clicking Done Finalizing Financial Report and Closeout Report Validated only sends another notification to the Accounting Office Approver. All the indicated tasks should be completed before taking these actions.

Attachment/s Attachments <u>None</u> Add				Step 5. On the Notification Page with the Closed option, Accounting Office Approvers are allowed to Add Attachment/s
University Information System Home Page > Research Information Module - I Approval	Research CP 1 submitted by Pas	sco, Ms. Cherie Anne	needs your Closed Reassig	before clicking on the Closed button.
From To Sent 11-Sep-2021 10:57:49 ID 6365113 Details				
A Basic Info				
Research Sequence No Assignment Position Type of Research Type of Research (Specifics) Title of Research Title of Research (Line 2) Title of Research (Line 3) Brief Description Main Area of Interest	00000028 Junior ICT Manager Quantitative Research research specifics CP 1 Research CP 1 Line 2 CP 1 Line 3 CP 1 description CP 1	ħ		

				Completed	Reassign
From					
То					
Sent	11-Sep-2021 10:58:44				
ID	6365114				
etails					
Basic	c Info		k		
	Research Sequence No	00000028			
	Assignment Position	Junior ICT Manager			
	Type of Research	Quantitative Research			
	Type of Research (Specifics)	research specifics CP 1			
	Title of Research	Research CP 1			
	Title of Research (Line 2)	Line 2 CP 1			
	Title of Research (Line 3)	Line 3 CP 1			
	Brief Description	description CP 1			
	Main Area of Interest	🗒 😂 🕞 🌞 🔻 🎟			
		Fisheries			
		Environmental Sciences			

Step 6. On the Notification Page with the Completed option, **Research Office Approvers** should click the Click to update Project Status link.

neialeu Applications

Click to update Project Status

Actual End date	23-Jun-2022	Ē			
* Project Status	Completed		5	Q,	

University Information System Home Page > Research Information Module - I your Approval	Research CP 1 submitted by Pasco, Ms. Cherie Anne	e needs	Completed Reassign
From To Sent 11-Sep-2021 10:58:44 ID 6365114 Details			
Basic Info		•	
Research Sequence No Assignment Position Type of Research Type of Research (Specifics) Title of Research Title of Research (Line 2) Title of Research (Line 3) Brief Description Main Area of Interest	00000028 Junior ICT Manager Quantitative Research research specifics CP 1 Research CP 1 Line 2 CP 1 Line 3 CP 1 description CP 1 Fisheries		

Step 7. Then, update the Actual End Date as well as the Project Status to Completed.

Other details available for updates are the following:

- Number of Mentored Students
- Project Milestones

Once done, click Completed.

Expected Result:

The notification on the approver's worklist will be closed.

		Fu	ll List
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From	Туре	Subject	Sent
There are no notifications in this view.			

Also, a notification will be sent to the **project leader** stating that the research has been completed and the status of the research will also be updated..

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VIEWING ACTION HISTORY



1. DOCUMENT CONTROL

1.3 Change Record

Date	Author	Version	Change Reference:
22 November 2021	Cherie Anne R. Pasco	1.0	Initial

1.4 Description

Process ID	
Process Name	Viewing Action History
Functional Domain	UP Research Information Module
Responsibility	UP Research Information Module
Purpose	To view the approval status and notification actions taken on
	research records.
Data Requirement	None
Dependencies	Research record in UP RIM submitted for approval.
Scenario	Project leader or UP RIM administrator would like to review the
	actions users have performed on the notification.



Step 1. Go to uis.up.edu.ph

Step 2. Log-in your UP Mail credentials (e.g. *username* and *password*)



Step 3. From *UIS Home Page* proceed to *Navigator Region* and select any of the following:

- UP Research Information
 Module
- UP Research Information Module Administrator
- UPS Research Information Module Administrator

Then, click Inquiry.

Research Information	on M	odule - Sur	mma	ary Page								
Advanced Search												
Specify parameters and values	to filter	the data that is d	lisplay	red in your result	s set.							
Match 🧿 All 🔘 Any												
Research Sequence No	o is		~									
Research Title	e is		~									
Type of Research	h is		~									
Project Status	s is		~									
	Go	Clear		Add Another	Constitue	nt Unit	Add					
🖾 😂 🕞 🌞 🛛											_	
Research Sequence No	Resear	ch Title						Type of Research	Project Status	Approval Status	Constituent Unit	View
00000001	Marine a	and onshore geor	physic	al investigations	of the Mar	nila Subduction 2	Zone	Scientific Research	Execution and Control	For Approval	UP Diliman	P
00000021	1st							Descriptive Research	Incomplete	Approved	JP System	
00000022	Researc	:h CP 01						Creative Works	Execution and Control	Approved	JP System	e
00000023	Researc	h CP 02						Cross-sectional Survey	Execution and Control	Approved	JP Manila	
00000024	Researc	h ACC 01						Curriculum Review	Execution and Control	Approved	JP Manila	
00000025	Researc	h CBD 1						Creative Works	Execution and Control	For Approval	JP Diliman	
00000026	Researc	h CBD 2						Creative Works	Execution and Control	Approved	JP System	
00000027	Researc	h CBD 3						Curriculum Review	Execution and Control	Approved	JP System	

Step 4. On the **Summary Page**, search for the research record you would like to view.

The *Approval Status* will show if the research record has been approved or in the process of approval.

Advanced Search												
Specify parameters and values	s to fill	ter the data that	t is display	ed in your result	ts set.							
Match 🧿 All 🔘 Any												
Research Sequence N	ois	5	~									
Research Tit	le is	5	~									
Type of Researc	it it	5	~									
Project Statu	IS IS	5	~									
	(Go Clear		Add Another	Constituer	t Unit v	Add					
🗮 🗲 🖻 🌞 🔻 🎟												
Research Sequence No	Rese	earch Title						Type of Research	Project Status	Approval Status	Constituent Unit	Viev
00000001	Marin	ne and onshore	geophysic	al investigations	of the Man	ila Subduction Zo	ne	Scientific Research	Execution and Control	For Approval	UP Diliman	
00000021	1st							Descriptive Research	Incomplete	Approved	UP System	Ē
00000022	Rese	arch CP 01						Creative Works	Execution and Control	Approved	UP System	
00000023	Rese	arch CP 02						Cross-sectional Survey	Execution and Control	Approved	UP Manila	
00000024	Rese	arch ACC 01						Curriculum Review	Execution and Control	Approved	UP Manila	
00000025	Rese	arch CBD 1						Creative Works	Execution and Control	For Approval	UP Diliman	
00000026	Rese	arch CBD 2						Creative Works	Execution and Control	Approved	UP System	e
												-
00000027	Rese	arch CBD 3						Curriculum Review	Execution and Control	Approved	UP System	

Step 5. To view the action history for a research record in the process of approval, click its approval status – *For Approval*.

Research Information Module - Review Page	Back	Expected Result:
Details		You will be redirected to the Review Page where the new or
▲ Basic Info		updated research record for
Research Sequence No	00000025	approvar will be shown.
Assignment Position	Professor 10	
Type of Research	Creative Works	
Type of Research (Specifics)		
Title of Research	Research CBD 1	
Title of Research (Line 2)		
Title of Research (Line 3)		
Brief Description	description Research CBD 1	
Main Area of Interest	💢 😂 📧 🔅 🔻 🎟	
	Agricultural Sciences	

n History					
; 🖻 🔅 🗕 🏢					
Name	Position	Organization	Action	Date	Note
	l		Submit	08-Nov-2021 10:	
	Research Office Approver	UP Research Office	Approved	08-Nov-2021 11:	
	Accounting Office Approver	UP Accounting Office	Updated Fiscal Info	08-Nov-2021 11:	
	n History ♥ I III Name	Name Position Research Office Approver Accounting Office Approver	History Image: Name Position Organization Image: Image	History Image:	History Image: Sympletic symple

Scroll down the page to view the *Action History*.

Research Information Module - Summary Page

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Match 💿 All 🔘 Any								
Research Sequence No	is		~					
Research Title	is		~					
Type of Research	is		~					
Project Status	is		~					
	Go	Clear		Add Another	Constituent	t Unit	×	Add

Step 6. Go Back to the Summary Page.

To view the action history for an approved research record, click the *View Icon.*

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Research Sequence No	Research Title	Type of Research	Project Status	Approval Status	Constituent Unit	View
00000001	Marine and onshore geophysical investigations of the Manila Subduction Zone	Scientific Research	Execution and Control	For Approval	UP Diliman	
00000021	1st	Descriptive Research	Incomplete	Approved	UP System	
00000022	Research CP 01	Creative Works	Execution and Control	Approved	UP System	
00000023	Research CP 02	Cross-sectional Survey	Execution and Control	Approved	UP Manila	Ę.
00000024	Research ACC 01	Curriculum Review	Execution and Control	Approved	UP Manila	E.
00000025	Research CBD 1	Creative Works	Execution and Control	For Approval	UP Diliman	Ę.
00000026	Research CBD 2	Creative Works	Execution and Control	Approved	UP System	E.
00000027	Research CBD 3	Curriculum Review	Execution and Control	Approved	UP System	E
00000029	test	Descriptive Research	Incomplete	Approved	UP Baguio	E

Research Information Module - Review Page	Bac	Expected Result:
Details		You will also be redirected to a Review Page where the details
A Basic Info		of the approved research record
Research Sequence No	00000025	will be shown.
Assignment Position	Professor 10	
Type of Research	Creative Works	
Type of Research (Specifics)		
Title of Research	Research CBD 1	
Title of Research (Line 2)		
Title of Research (Line 3)		
Brief Description	description Research CBD 1	
Main Area of Interest	📜 😂 📧 🔅 🔻 🎟	
	Agricultural Sciences	
]

Actio	n History					
X (; 🖻 🏟 🗕 🏢					
Line No	Name	Position	Organization	Action	Date	Note
1			,	Submit	08-Nov-2021 10:	
2		Research Office Approver	UP Research Office	Approved	08-Nov-2021 11:	
3		Accounting Office Approver	UP Accounting Office	Updated Fiscal Info	08-Nov-2021 11:	

Scroll down the page to view the Action History.

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