CONVERIS PROCEDURE

The aim of this procedure is through a software tool - Converis - to be able to provide statistics and reports in order to assess the competitiveness and the publication excellence of the Institute in a standardized and streamlined fashion.

Converis is a Research management software. It has been implemented with 2 objectives in mind:

1. Manage the validation workflow for research applications and publications

2. Provide a reporting and management tool regarding publication and research project data within the Institute

1.1 Research validation workflow:

Each new application (submission to a project, conference etc…) needs to be entered in Converis as per user guide.
The deadline to enter a new application and to have it ready for validation by the Research Committee is **at least 7 days before the application's (submission) deadline**.

The Process:
1. The Research office checks and validates the application and sends the application to the Accounting department for a financial validation. After validation, the Accounting department sends the application back to the researcher for submission. The researcher confirms the submission.

The application is not successful: the researcher changes the status of the application to "Unsuccessful".
The application is successful: the researcher changes the status of the application to "Awarded"
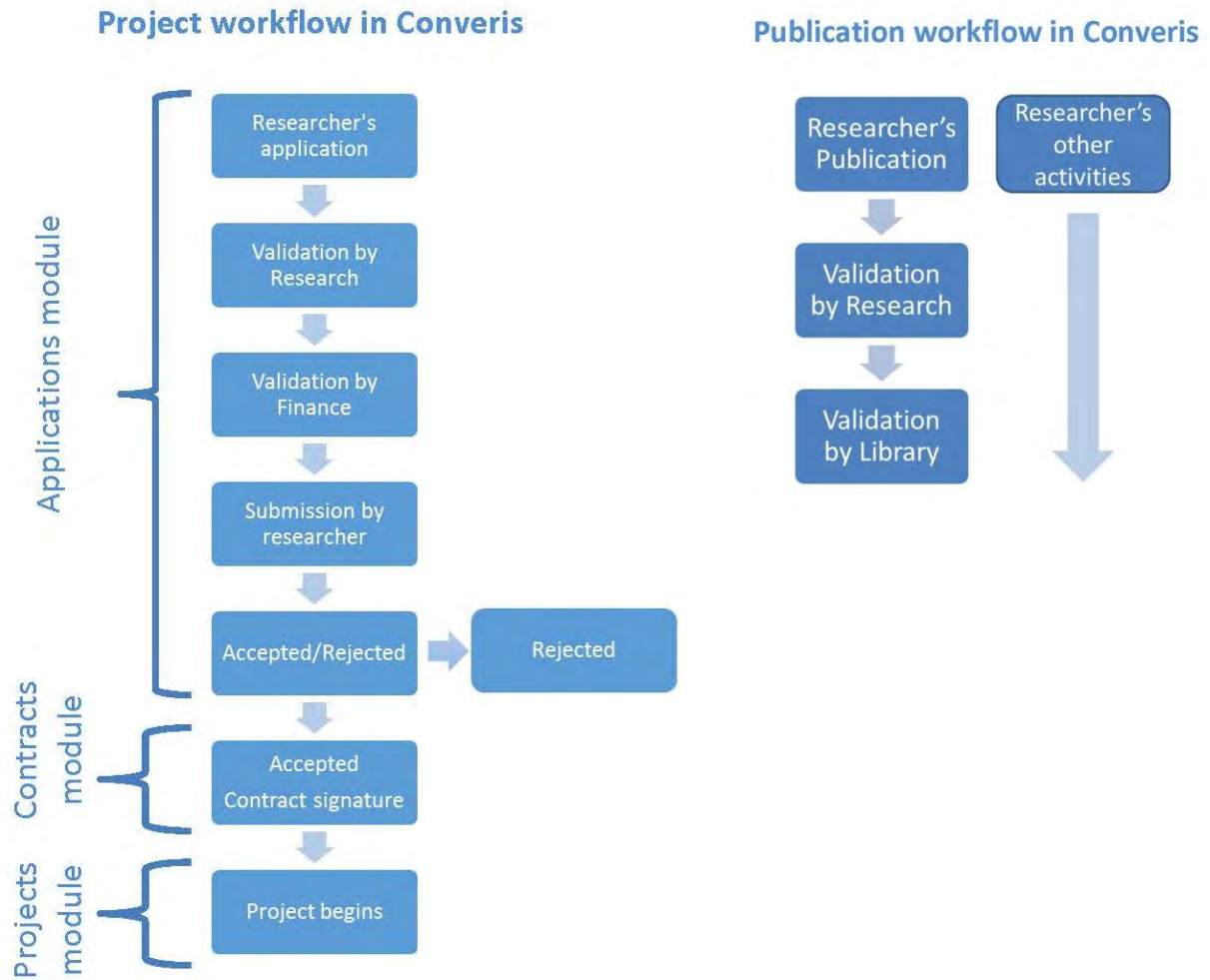
2. Automatically the application is transferred into the Contract module where the Accounting department proceeds with the financial and legal steps of the project such as finalizing the contract and setting up the project account.

3. Once the contract is signed, and the project starts, the record is automatically transferred into the Project module where it is updated by the researcher as the project matures.

1.2 Publications workflow:

As soon as you have a paper, book, award, conference etc… published or accomplished, enter the details into Converis as per user guideline. **All data need to be complete by the end of the year for the generation of annual activity reports.**
The entries are checked and validated by the Research office and submitted to Library for check and validation.

Workflows:

Project workflow in Converis

Applications module

- Researcher's application
- Validation by Research
- Validation by Finance
- Submission by researcher
- Accepted/Rejected → Rejected

Contracts module

- Accepted Contract signature

Projects module

- Project begins

Publication workflow in Converis

- Researcher's Publication
  - Validation by Research
  - Validation by Library
- Researcher's other activities

Versions

Version	Modification	Publication date
1	Procedure creation – G. Wharton revised by E. Prügl	04.11.2013

Annexes and links :

Image

Process in picture : Research workflow Process in picture : Publication workflow

Files