



## HIGHLIGHTS

1. RMS Project Revitalization
2. RMS Pre-Award training is ongoing
3. Update to Workflow Engine: placed in pause for revitalization
4. Multi-Project: placed in pause for revitalization

Your place for system updates, changes, and next steps for the Research Management System (RMS) project.

## ANNOUNCEMENTS

The total number of records created to date:

- Pre-Award/LOI: 145
- Pre-Award/Applications: 1147
- Post-Award/Projects: 492

**RMS Project Revitalization** As part of our commitment to creating a functional, user-friendly and cost-effective system, the RMS has begun a project revitalization process. This entails evaluating priorities and realigning our work to ensure we're spending our time on the right things.

## TRAINING FOR RMS

Please encourage ALL members of your faculty to enroll in RMS training as it is an important piece of our Eyes High strategy. Please communicate with your respective faculties regarding the value in attending RMS training sessions. Those users who attended training after submitting applications through RMS have routinely stated they wished they had attended training prior to using the software.

- Trainees often state it is very user friendly with just a few potential confusing areas that could be problematic if attempting to submit applications very near to the RSO Internal Deadline and had not previously taken training.
- Sessions are booked for 90 minutes however most people finish in about an hour.

### Upcoming RMS Training Sessions

#### RMS Pre-Award/Application Training

For researchers and team members

##### Morning Session

(10:00 a.m. – 11:30 a.m.)

Apr 8

Apr 27

May 18

##### Afternoon Session

(2:00 p.m. – 3:30 p.m.)

Apr 13

Apr 22

May 6

May 12

#### RMS Approver Training

For Dept Heads, ADRs, etc.

Apr 21

10:00-11:00 a.m.

For any of these sessions, if these times don't work for you, or if you have an urgent need, or if you require training unrelated to topics in these sessions, please email [rms@ucalgary.ca](mailto:rms@ucalgary.ca) and we will work with you to find a solution.

## Training Videos

The RMS team has created a number of videos that walk users through processes which are known to be confusing or to cause users to call the help line. These videos can be found on the RMS website. The videos are:

- [How to create a Pre-Award/Application](#)
- [How to create a Pre-Award/Letter of Intent](#)
- [How to approve a record \(or not approve/return record to PI\)](#)


Please share and encourage your colleagues to use these videos, especially if they haven't attended a training session. If you have any other ideas or suggestions for helpful videos like this, let us know at [rms@ucalgary.ca](mailto:rms@ucalgary.ca).

## PowerBI Reports Training

The RMS team has developed a number of reports using PowerBI. Power BI collects data from RMS and presents data on competitions and awards so that faculty can monitor and adjust priorities based on the data. RSO was the first group to get trained and start using PowerBI RMS reports. These reports have also been rolled out to the Research Facilitators and Research Administrators as well. Based on feedback from the first users, we have made a number of enhancements to make the reports more useful. Note, report visibility is limited to the data you can see in RMS, this means that you will only see records from those in your faculty or department.

## CHANGES AND UPDATES

- **Letter of Intent Notifications** You may have noticed an email from the VPR office regarding LOI notifications sent on March 26<sup>th</sup>. The RMS will now deliver Letter of Intent (LOI) notifications to your email. These email notifications are similar to those that RMS users are already familiar with, such as:
  - Submitted for Approval
  - Invited for Full Application
  - Pending PI Information
  - Notice of Decision Alert
  - Approved for submission to agency.
- **New RMS Login Message** The Research Services Office (RSO) has seen a significant increase in the creation of new Funding Opportunities (FO) and Agencies over the past few months. These must be reviewed for accuracy and/or duplication. Any applications with a faulty FO must then be corrected. Since this validation is currently performed by RSO staff, the creation especially of duplicate FO entries may also result in delays to application submission or project setup.
  - Should you be unable to locate the Funding Opportunity or Agency, contact UService 403-210-9300 or [rms@ucalgary.ca](mailto:rms@ucalgary.ca) to seek assistance in finding the FO. RMS training may also be arranged through [rms@ucalgary.ca](mailto:rms@ucalgary.ca).
- **Agency and Funding Opportunity Status** A new feature has been added to help RMS users identify the correct agency and funding opportunity. When added to a record, the status of the agency is indicated in a new column as shown to the right. Agencies now have this feature with funding opportunities to follow shortly. FOs and Agencies which don't have an "Active" status means that it has not yet been vetted by RSO and/or Project Maintenance.
- **Multi-Project functionality** – The Salary component functionality has now been tested and is in production RMS.
- **Early Release of Funds (ERF) to Full Release of Funds (FRF) Amendments** – This amendment has been deployed to production. The ERF to FRF amendment represents the majority of amendments made for projects.

Funding Agency/Sponsor * 		
Click on + and start typing to search for an existing funding agency/sponsor, which will be reviewed and verified by Research Services. Research To determine the applicable overhead rate, please refer to the Funding		
When entering the Cash Requested, please do not use a \$ sign to prevent it then click save. This will allow the user to proceed with the application		
	Status	Currency
Canadian Institutes of Health Research (CIHR)	Active	CAD (Canadian Dollar) 

## CLARIFICATIONS

There has been some confusion about approval workflows in some faculties as well as some potential new notifications for some users. Hopefully the following will clarify these concerns:

- The **Workflow Engine** is a piece of software within RMS that ‘routes’ approval and review requests according to several characteristics with the applicant’s profile and requirements as mandated by university audit rules. In some faculties, the organization design is such that certain temporary modifications need to be built to enable the expected routing to occur. The new WFE will be better placed to support these current challenges as well as other atypical workflows, statuses and roles that have been recently requested for groups in Project Maintenance and Contracts, and to provide for future flexibility in yet to be determined university requirements.
- **Managing / Approving records** – Records that require action on your part such as completing an information request, or an approval will show up in your **Things to do** list on your RMS dashboard. Once the requested task is completed the record will no longer show on your **Things to do** list. It will be removed from that list and added to your **Recently Edited** items list. The record will also be available to view if you search for it.

## REMINDERS

- Please do not use production RMS for practice or training purposes. There is a risk that official records could be altered inadvertently. We offer frequent training sessions and can setup new sessions should you require specialized training.
- **If you work in a Departmentalized faculty, please forward your most recent list of Department Heads (including Associate/Deputy heads) to [rms@ucalgary.ca](mailto:rms@ucalgary.ca).** If you have already done so, thank you!
- RMS sends notifications when a pre-award/application or LOI record needs approval to all faculty approvers and their equivalents. If you do not provide approvals and do not want to receive these notifications, you can turn off all notifications from RMS. See [QRG Notifications](#). Further, if you continue to receive these notifications and are no longer an associate/deputy Department Head, you **MUST** submit a PSAR request to have your name removed from this role otherwise you will continue to receive these approval requests.
- For Associate/Deputy/Delegate Department Heads: should you be applying for a grant competition through your own department, please remember you **MUST** choose that department work affiliation which has “Researcher” appended to the end of the description. Should you not, the system will prompt that you have chosen an invalid investigator.
- **RMS Access** - Access to RMS is not granted by the RMS team. It is entirely determined and then assigned by the person's role in PeopleSoft. This means that if a person does not have access, or if they do have access but their role is incorrect, or if they require a new type of access, a [PeopleSoft Access Request \(PSAR\)](#) must be completed. Once the PSAR is approved (can take 72+ hours), RMS access will be automatically granted.
- **RMS Support** – UCalgary support teams have streamlined their processes and now have one central contact point by phone: [UService 403.210.9300](tel:403.210.9300). For RMS support you can email [rmshelp@ucalgary.ca](mailto:rmshelp@ucalgary.ca)

## NEXT RELEASE

- All new functionality development tasks are temporarily on hold while we complete a project revitalization.

## ON THE HORIZON

- Project Revitalization
- eRSO Data Migration

## NEED HELP?

You can always access help by checking the QRGs and user guides on the [RMS webpage](#). Or you can contact the RMS Project Team, via email: [rms@ucalgary.ca](mailto:rms@ucalgary.ca)