



HIGHLIGHTS

1. RMS Pre-Award training is ongoing
2. Update to Workflow Engine
3. Power BI Reports
4. Multi-Project

This is a combined February / March Newsletter

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: 124
- Pre-Award/Applications: 925
- Post-Award/Projects: 291

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. The training team may not be able to accommodate all last-minute requests for training before a competition deadline for research teams who leave it to the last minute. 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.
- Many attendees state they can see the benefits of using the software over the previous paper submission process and understand the training sessions would be helpful in mitigating any potential frustrations incurred during tight timelines.
- Even if you have an assistant to enter the application for you, there may be circumstances where the Principal Investigator will need to login and execute tasks within RMS which the assistant may not have authority to complete.
- RMS users may also visit our website at any time to gain access to learning materials such as Quick Reference Guides (QRGs). The RMS webpage can be found [here](#).
- Refresher training sessions for Approvers (typically DH and ADR) are being offered. These are specifically aimed at people who need to provide approvals for pre-award applications.
- Anyone else who wants a refresher on RMS (non-approver role) or there is not a date that works for them, should contact rms@ucalgary.ca.

Upcoming RMS Training Sessions

RMS Pre-Award/Application Training

For researchers and team members

Morning Session (10:00 a.m. – 11:30 a.m.)	Afternoon Session (2:00 p.m. – 3:30 p.m.)
Mar 2	Mar 18
Mar 11	

RMS Approver Training

For Dept Heads, ADRs, etc.

Mar 3	2:00-3:00 p.m.
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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 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.

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. Following that, we will soon be offering training to other faculty including Department Heads, ADRs and Deans. We will advise when these sessions become available. 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.

A second release of these reports is scheduled for March.

Train the Trainer

The RMS team is planning to offer Train the Trainer sessions for Staff who may be providing training sessions in the future. Among other things, these sessions will show you how to setup and conduct an RMS training session, provide you with some commonly asked questions and a list of important information that you'll need to know to increase your RMS expertise. If you're interested in this, please email rms@ucalgary.ca.

CHANGES AND UPDATES

- Based on user feedback, instructions on how to submit an application or LOI have been added to the bottom of the page for each respective application. Users will see these instructions when they reach the bottom of the Application or LOI.

To Submit for Approvals:

1. Click **Save & Progress**
2. Select **Submitted for approvals**
3. Click **Save & set status**

1.

Cancel Save **Save & Progress**

Set status

In preparation 2.

Submitted for approvals
You acknowledge responsibility for the application's content and for carrying out the research in accordance with both university and funding agency regulations.

Cancel **Save & set status** 3.

- **Letter of Intent Notifications** – These will be enabled once work on the revised Workflow Engine is completed. Until this is done, it is not possible for Approvers to be notified by RMS that an LOI is awaiting approval. Please continue to work with research teams in your faculty to identify RMS records that require approval/approver attention. A system 'banner' message has been added in RMS for this purpose. Please mention this banner to your colleagues.

- **Multi-Project functionality** – The Salary component functionality has now been tested and is in Production! Other Multi-Project functionality is in various stages of development.
- **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. Others including Change of PI, funds awarded, project start / stop dates, etc., are in various stages of completion.
- **Status Changes** - These will be deployed in conjunction with the Workflow Engine update, described below. For additional context, the RMS system has limits on the number of statuses possible across the entire system: Pre-Award, Post-Award, Contracts, etc. In order to manage this constraint, the project team, along with end user consultations, needed to streamline statuses for easier understanding and to conserve statuses for new undeveloped functionality.
- **Workflow Engine (WFE)** - It is currently undergoing internal testing. Once user acceptance testing is completed, the new WFE will support the addition of new statuses, new roles and improved academic approval workflows. This update is complex due to the wide variety of possible approval chains and exceptions that the system must be able to handle.
- **Funding Deadline Calendar** - The Funding Deadline Calendar is hosted by Drupal-7, which is nearing end of life. To mitigate this risk, modifications are being made to the Research Management System (RMS) so it will host the Funding Deadline Calendar. This information will also be exported from RMS to a new location on UCalgary's Research webpage. Exact location will be communicated at a later date. Search capability will be maintained on this new website as well as in RMS. All the information that is currently hosted in Drupal-7 will be available in RMS along with two additional strategic research themes; Child Health & Wellness and One Health. Requirements investigations continue to determine a new hosting site as well as finalization of requirements for RMS.

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.
- We anticipate the revised WFE will be deployed in April. It will more effectively manage academic approval situations when Associate Department Heads apply for grants. Currently the record advances directly to the ADR for approval, bypassing the Department Head, requiring RSO to seek a manual signature from the Department Head. This routing occurs because the associate Department Head has been provided the RMS Dept Head role. It is anticipated the revised WFE will be able to distinguish between the associate Dept Head and the Dept Head, properly routing the application for Department Head approval.
- Regarding Notifications in RMS: These are launched by RMS according to status changes and depend on the role of the individual who selected the status. In order to provide the option for adding more Notifications, work must first be completed on the new WFE and status changes.
- **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. If you have already done so, thank you!
- RMS sends notifications that a pre-award/application 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** – UofC support teams have streamlined their processes and now have one central contact point by phone: [UService](tel:403.210.9300) 403.210.9300. For RMS support you can email rmshelp@ucalgary.ca

RECENTLY UPDATED DOCUMENTS

- Updated QRG for [Withdrawing or Deleting a record](#).
- Link to all [RMS Training Materials](#)

NEXT RELEASE

- Funding Calendar
- New Work Flow Engine (and notifications)
- Modified Statuses

ON THE HORIZON

- Internal Awards
- Integrate Legal department and IPD business processes in RMS
- Integrate Institutional Program Division functionality

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