RMS NEWSLETTER

April 29, 2021

HIGHLIGHTS

1. RMS Project Revitalization

2. RMS Pre-Award training is ongoing

3. Update to Workflow Engine: 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: 152
- Pre-Award/Applications: 1113
- Post-Award/Projects: 627

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.

RMS HELP AND QUESTIONS

As a result of the project revitalization, the project team has limited resources to field support calls. If you need support and it impacts your ability to do your job in RMS, please email the team at rms@ucalgary.ca, not individual team members. Our commitment is to respond to your email within one working day.

In addition, you may also contact UService (formerly ISC) by phone at 403.210.9300 for general RMS help or role access issues involving People Soft Access Requests (PSAR). They may also be reached at rmshelp@ucalgary.ca.

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. 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.
- Pre-Award Sessions are booked for 90 minutes however most people finish in about an hour.

Upcoming RMS Training Sessions – Contact rms@ucalgary.ca to register

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.)
May 18	May 6
May 27	May 12
June 3	June 9
June 23	June 17

RMS Approver Training
For Dept Heads, ADRs, etc.

May 26	10:00-11:00 a.m.

CHANGES AND UPDATES

Search Indexing – You may have noticed that searching in RMS has been slow or produces incomplete results. The algorithm used to facilitate searching in RMS has been improved which should eliminate issues with searching.

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:

- **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

- The following welcome message was added to RMS for all users:

    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 application records with a faulty FO must then be identified and then 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 rmshelp@ucalgary.ca to seek assistance in finding the FO. RMS training may also be arranged through rms@ucalgary.ca.

- 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.

- 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 with be automatically granted.

- Over the summer months, the RMS team plans to send newsletters every two months. We will return to a regular monthly schedule in September.

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