



Your place for system updates, changes and next steps for the RMS project.



CHANGE SUMMARY

Here are the top changes to watch for.

1. Submit for Approval button
2. Editing Ethics and Special Requirements radio buttons
3. Document management
4. Project Title and Cash Requested fields
5. Status / Workflow changes
6. Auto-Login

CHANGES AND ENHANCEMENTS

- The document section in RMS has a new procedure for uploading documents. You no longer need to use the ‘versioning’ tool in RMS – just upload the new versions of the document to the section. The most recent one will be identified by the date it was uploaded. We think this will

Uploaded on	
2020/03/31	 

- make it simpler to manage your documents and won’t have to worry about using the version tool, as it was also a bit confusing to use.
- Submitted for approvals button will be rephrased to “Submit for Internal Approvals” and will be ready for Release 3. There will also be new descriptive text below it.
- The ability for the PI or Team Member to change the Special Requirements and Ethics choices when sent back from the Research Facilitator or Research Admin has been revised. They may now revise these sections if a correction is required.

- Numerous Status changes and resulting changes to Workflows for Pre and Post award are pending.
- Auto-Login is new functionality in RMS that will automatically provide you with your designated role in RMS, once it is defined in PeopleSoft. For some roles, this did not occur automatically. This now means there won’t be any more waiting to be manually added to RMS once you have been properly set up in PeopleSoft. This change applies to roles such as Associate Department Heads or Research Administrators.
- Ability to modify the Project Title and Cash Requested fields is pending.

REMINDERS

TRAINING

- Pre-Award training for RMS is ongoing. The RMS team needs to know if your colleagues require or desire training. Training is available throughout the year, not just when new competitions are announced. Have them contact rms@ucalgary.ca for information about training 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](#).

SCHEDULED VIRTUAL TRAINING

We are offering virtual / remote training sessions every other Thursday starting April 23rd. If you or any of your colleagues would be interested in this training, please get in touch with us (RMS@ucalgary.ca)

<u>Mornings (10:00 – 12:00)</u>	<u>Afternoons (14:00 – 16:00)</u>
<i>April 23</i>	<i>May 7</i>
<i>May 21</i>	<i>June 4</i>
<i>June 18</i>	<i>July 2</i>
<i>July 16</i>	<i>July 30</i>
<i>August 13</i>	<i>August 27</i>
<i>September 10</i>	<i>September 24</i>

TRAINING LINKS

- [RMS Training materials](#)
- [Create a Pre-Award Grant Application](#)

DEPARTMENT HEAD INFORMATION

- Please forward your up to date list of Department Heads / Associate / Deputy / Interim Heads to rms@ucalgary.ca

RECENTLY UPDATED DOCUMENTS

Updated and new support documentation will be available very soon. We think you will find them very useful, [go check them out!](#) As RMS functionality continues to mature, these will be updated accordingly.

- All Pre-Award Quick Reference Guides (QRGs) on the RMS webpage have been updated and shortened where possible.
- A variety of Post-Award QRGs for researchers and team members will be available on the RMS webpage soon.
- The Pre-Award Learning Guide has been updated and shortened.
- Reminder: Always use the most-up-to-date version of the QRGs and Learning Guides. This ensures you get all the updated information.

NEXT STEPS

Functionality planned for the Next Release:

- Letter of Intent
- Foreign Currency
- Amendments
- Reporting for RSO (reporting for other users will be in future releases)

On the horizon: Multi-sponsor applications

NEED HELP?

You can always access help by checking the QRGs and user guides on the [RMS webpage](#). See the links above.

You can request training for a specific task or role in RMS for you or your team. Contact rms@ucalgary.ca and we can discuss options. Or contact us with RMS questions at any time.