



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

## HIGHLIGHTS

1. Update to Workflow Engine
2. RMS Pre-Award Training is Ongoing
3. Approver Refresher Training is Ongoing
4. Approver Comments clarification

## CHANGES AND UPDATES

- “Add approver” function has been removed.
  - Power BI Reporting – being rolled out to Research Services Office users as the first wave for this new reporting tool.
  - Help-text added when creating a new record that directs people to the RMS training website.
  - Help-text added to the “Approver page” indicating that approvals can only be done from this page.
  - **Amendments** - We're finalizing the last few requirements from the business so we can start our internal configuration and testing before going to UAT.
  - **Status Changes** - Still in development. In late 2019, we discovered that the system has limits on the number of statuses possible for a given record. We've started to streamline these statuses to make them easier to understand for the user and to allow additional statuses as we add new functionality.
- **Workflow Engine (WFE)** - The Workflow Engine or WFE is the backbone of the RMS workflow. A number of issues were discovered in the WFE based on the original design and build of the system which needed to be addressed. This is ongoing work that needs to be completed before status changes can be implemented.

## CLARIFICATIONS

There was some confusion about the purpose of Comments boxes in the approval process. Some text has been added as “help text” for the following two fields on the approval page:

- **Approver Comments** box: Comments left here by an approver are included in the notification sent to the PI. These can also be viewed in the record by the PI or any person listed in the record as long as the record is not set to Not Approved.
- **Note to approver(s)** box: Comments left here by the PI are included in approval notifications sent to approvers (Dept Heads, ADRs, Deans, etc.) and can also be viewed in the record by any person listed in the approval chain.

## REMINDERS

- If you work in a Departmentalized faculty, could you 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 that a 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](#).
- **Encourage all potential grant applicants to sign up for RMS training soon. Additional sessions have been added and they are filling up. Sign up early to avoid delays.**

## TRAINING

- Letter of Intent (LOI) functionality was deployed in Release 3 so we strongly recommend that any Researcher or other interested person, sign up for training if there is intent to submit a competition that requires an LOI to be submitted. **NOTE: given the very similar functionality between Pre-Award and LOI, these sessions will address both.**
- **We strongly encourage people who might use RMS in the next 6 months to sign up for a training session now and not wait until the last minute to sign up.** [See the updated list of competitions that will be managed in RMS.](#)
- 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](mailto: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](#).
- 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) should contact [rms@ucalgary.ca](mailto:rms@ucalgary.ca).

## SCHEDULED VIRTUAL TRAINING

- We are offering virtual / remote training sessions every week. If you or any of your colleagues would be interested in this training, please get in touch with us ([RMS@ucalgary.ca](mailto:RMS@ucalgary.ca)).
- Additional dates have been added to meet the demand.
- This year we've held 58 training sessions for 290 RMS users.

### Upcoming Training Sessions for RMS Pre-Award/Application

Morning Session (10 a.m. – 12 p.m.)	Afternoon Session (2 p.m. – 4 p.m.)
August 19	August 27
September 10	September 1
September 15	September 24

Some feedback from recent training sessions:

- *"This was one of the smoothest training seminars I have been to."*
- *"The content, format, presentation and facilitator were impressive. I was concerned about how an in-person course would be translated to a Zoom setting, but I learned with ease and everything went smoothly. A job well done to everyone."*
- If these times don't work for you, or if you have an urgent need, or if you require training unrelated to pre-award, please email [rms@ucalgary.ca](mailto:rms@ucalgary.ca) and we will work with you to find a solution.

## RECENTLY UPDATED DOCUMENTS

- New QRGs for Letter of Intent and Foreign Exchange.
- Updated Quick Reference Guide for how to [Approve a Pre-Award/ Application](#)
- RMS [Frequently Asked Questions document](#) – this is a new document with a list of questions and answers.
- Link to all [RMS Training Materials](#).

## NEXT RELEASE

- Amendments

## NEED HELP?

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