



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. Updates to Training and Support Documents

ANNOUNCEMENTS

Over the recent busy grant season (September – October), RMS users successfully submitted 392 applications and LOIs. In total, RMS has processed close to 600 applications and LOIs since it was launched.

CHANGES AND UPDATES

- **Letter of Intent Notifications** - These are in development and 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.
- **Power BI Reporting** – this new reporting software is being rolled out to Research Services Office users in the first wave. Currently, several reports are being created and tested by Research Services Office users. Once released for RSO users and functionality is refined, release to other groups will then be undertaken.
- **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** - 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)** - 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 must be changed to address performance and sustainability concerns. This ongoing work will be completed in parallel with the status changes described above. Extensive testing of this new work will be conducted through November. Once these critical changes are completed, additional Notifications deployment can be undertaken.
- **Main Campus and CSM Legal** – Requirements discovery from both Main Campus Legal and CSM Legal are currently underway. This work includes not only an elucidation of their processes but also the research 'umbrella' that is supported by RMS.
- **Multi-Project functionality** – The build for this is nearing completion. We are to begin internal testing and then User Acceptance Testing soon.

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** (described above) 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.

Regarding Notifications in RMS: These are launched by RMS according to status changes and also 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.

Notifications: In a previous newsletter, we stated that notifications will be sent to the Principal Investigator, Research Facilitator and Research Administrator, if appropriate, after each level of Pre-Award approval, as well as others, as per Research Facilitator's request. These notifications are still in development; they have not been implemented yet.

REMINDERS

- **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.

TRAINING

- 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.
- **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.](#)
- 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.

SCHEDULED VIRTUAL TRAINING (VIA ZOOM)

- Additional dates have been added to meet the demand. Sessions before major deadlines fill up quickly!
- This year we've held 80 training sessions for over 370 RMS users.

Some feedback from recent training sessions:

- *"This was one of the smoothest training seminars I have been to."*
- *"Thanks very much for providing us with an excellent training session."*
- *"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."*

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.)
Nov 6	Nov 17
Nov 24	Dec 2
Dec 16	Dec 8

RMS Approver Training For Dept Heads, ADRs, etc.

Nov 10	10:00 a.m. – 11:30 a.m.
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- 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 indicating that you have an urgent need and we will work with you to find a solution.

RECENTLY UPDATED DOCUMENTS

- Revised QRG for [Bulk Approval of Applications](#) (functionality for the Associate Dean (Research) only)
- Updated QRG for [Creating a Pre-Award Application](#)
- Updated QRG for how to [Approve a Pre-Award/ Application](#)
- RMS [Frequently Asked Questions document](#) – this is a frequently updated document with a list of questions and answers
- Link to all [RMS Training Materials](#)

NEXT RELEASE

- Amendments
- New Work Flow Engine (and notifications)
- Modified Statuses

ON THE HORIZON

- Internal Awards
- Integrate Legal department business processes in RMS
- Multi-Projects

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