# RMS NEWSLETTER

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

## CHANGES AND UPDATES

- **Letter of Intent** Notifications. These are also in development and will be enabled once work on the revised Workflow Engine is completed. See 'Clarifications' below, for more information.
- **Power BI Reporting** – being rolled out to Research Services Office users as the first wave for this new reporting tool. Power BI Reporting – several reports are being created and tested by Research Services Office users. This is the first wave for this new reporting tool functionality. Once released for RSO users and functionality is refined, release to other groups will then be undertaken.
- 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.
- Help-text added to the application form to remind applicants to select the correct appointment for the PI.
- **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 across the entire system. In order to manage this constraint, the project team, along with end user consultations, has streamlined 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 needed to be addressed. This ongoing work will be completed in parallel with the status changes described above. Extensive testing of this new work will be conducted in October. Once these significant changes are completed, additional Notifications development can be undertaken.

## 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 according to 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. In addition, the new revised WFE will then 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.

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 PI, RF and RA after each level of Pre-Award approval. In addition, RA and RF will receive a notification after each record is created. These notifications are still in development, they have not been implemented yet. Please continue to work with research teams in your faculty to identify RMS records that require your attention.

## 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.
- 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 also 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 70 training sessions for over 350 RMS users.

**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.) |
|---|---|
| Oct 1 | Oct 8 |
| Oct 6 | Oct 13 |
| Oct 15 | Oct 22 |
| Oct 20 | Oct 29 |
| Oct 27 | Nov 4 |
| Nov 6 | Nov 17 |
| Nov 24 | Dec 2 |

**RMS Approver Training**
**For Dept Heads, ADRs, etc.**

| | |
|---|---|
| Oct 7 | **2:00 p.m. – 3:30 p.m.** |
| Oct 14 | **10:00 a.m. – 11:30 a.m.** |
| Oct 28 | **12:00 p.m. – 1:30 p.m.** |
| Nov 10 | **10:00 a.m. – 11:30 a.m.** |

Some feedback from recent training sessions:
- o *"This was one of the smoothest training seminars I have been to."*
- o *"Thanks very much for providing us with an excellent training session."*
- o *"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 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 Quick Reference Guide for Creating a Pre-Award Application
- 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
- New Work Flow Engine
- Modified Statuses

## 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