



HIGHLIGHTS

1. RMS Project Revitalization
2. New Dates for RMS Training
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: 247
- Pre-Award/Applications: 1547
- Post-Award/Projects: 973

RMS Project Revitalization As part of our commitment to creating a functional, user-friendly and cost-effective system, the RMS team is wrapping up the project revitalization process. This process entailed 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.

UService will be available for walk-in service starting September 7th. Walk-in is available Tuesday to Thursday only.

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.)
Sept 2	Sept 8
Sept 15	Sept 21
Oct 13	Oct 7
	Oct 26

RMS Approver Training

For Dept Heads, ADRs, etc.

Sept 29	10:00 – 11:00 a.m.
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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.

Recently, we have seen an increase in the number of records that researchers want to withdraw or delete. The process to do this depends on the state or status of the record. The process has been clarified in the document "[QRG Withdraw or Delete an application.pdf](#)" which can be found on our training website.

REMINDERS

- **Please remind the RMS users in your faculty to not use production RMS for practice or testing purposes.** This creates unnecessary and erroneous data in the system.
- **Searching/Using filters in RMS:** Filters can be used to search for or locate a record in RMS, including LOI, Applications, Post-Awards, Agencies and Funding Opportunities. If the filter scheme you setup does not produce the information you're looking for, try a new set of filter criteria.
 - Remember to choose the correct selection from the left menu before conducting your search. E.g., to find an LOI, you need to select Award Management > Pre-Award/Letters of Intent from the left menu.
 - For additional help, see the [Search Filter QRG](#) or contact rms@ucalgary.ca
- As a friendly reminder, if you are entering an application for a Researcher, please remember to add yourself in the Team Member section. If you do not, you will not have access to this record again and you may need to re-start the application process.
- Should you be unable to locate a Funding Opportunity or Agency, contact UService 403-210-9300 or rmshelp@ucalgary.ca to seek assistance in finding it in RMS. You can also contact us as rms@ucalgary.ca with any questions.
- 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 will be automatically granted.

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