Research Management System

Frequently Asked Questions (FAQ)

UNIVERSITY OF CALGARY

RMS

Contents

Access and Login Information

Why is access to my RMS account not working? (e.g. user login fails when IT credentials entered, message that account is "deactivated")

Credentials incorrect or the user Role applied by HR is insufficient for RMS access (must be team member, researcher, ADR, RF, RA, or have an RSO role).

Work with your reports-to manager to request the appropriate access for you via the PSAR tool (PeopleSoft Access Request), accessible through the MyUofC portal.

To initiate PSAR process (which may take more than 72 hours):

- Go to PSAR via MyUCalgary, or
- Submit request through IT

Once the individual has the correct role in PeopleSoft, their role will be updated in RMS within 24 hours.

Why is access to RMS is not working (e.g. page not found error)

This can be a result of MFA not being setup properly when connecting to the RMS site remotely. Please refer to IT support guidelines documentation for help with the setup of MFA.

How to enable MFA:
- This link will take you directly to the page to learn about and how to enable MFA: www.ucalgary.ca/mfa or, if you want to enable MFA yourself
- How to enable MFA through self-service: https://ucalgary.service-now.com/it?id=kb_article&sys_id=71245ae2db31338088ec597e5e9619a4

Please contact the IT Support Centre if you have any questions or concerns. They are aware that MFA is required for RMS access and will be able to help you in a timely manner:
- Live Chat at ucalgary.ca/it
- Phone 403.220.5555
- Email itsupport@ucalgary.ca

How do I get access to RMS?

RMS access is governed by roles defined in PeopleSoft. Note that:

- When a person changes roles within the university, they may lose existing permissions in PeopleSoft.
- If you must delegate signing authority to someone who does not yet have appropriate access in RMS, you must first ensure that they have the correct role in PeopleSoft.

In either case, a request must be submitted through PSAR (PeopleSoft Access Request). This process may take 72 hours or more so it should not be relied upon for last-minute submissions.

To initiate PSAR process:

- [Go to PSAR via MyUCalgary](#), or
- [Submit request through IT](#)

Once the individual has the correct role in PeopleSoft, their role will be updated in RMS within 24 hours.

What determines whether additional access (e.g., Team member, designate) is needed?

The type of award or individual circumstances may influence the decision. For example, more complex awards may require more assistance.

Is a Virtual Private Network (VPN) required to use RMS?

A VPN is not required to access RMS. Using one will not prevent you from accessing RMS so if you have one installed, you may continue to use it.

If a Team Member is set to a designate, do they have to accept the designation or can they reject it?

A notification of designation is given but not an option to reject the role.

See also: [Add / Delete Designate](#)

How do I request role changes in RMS?

E.g., my manager wants me to have the Research Administrator role in RMS so I will be able to view all applications in my faculty. How do I get that new role? Currently I have the Team Member role.

Roles in RMS are first designated in PeopleSoft and then exported overnight to RMS. You will need to have your manager complete the PeopleSoft Access Request (PSAR) form. You may also request IT initiate this process on your behalf. Once your Manager approves the role, it will be forwarded for final approval and your role will be assigned. This process takes at least 72 hours and often much longer.

To initiate PSAR process:

- [Go to PSAR via MyUCalgary](#), or
- [Submit request through IT](#)

Once the individual has the correct role in PeopleSoft, their role will be updated in RMS within 24 hours.

Approvals and Reviews

Why did I receive a notification from RMS saying that something needs my approval?

There are two reasons why you will be asked to approve something in RMS:

First is that you are listed as an approver (Department Head, ADR, etc.) or you have a role in PeopleSoft that is equivalent so someone in your faculty who typically does approvals. The permissions in RMS are such that approver roles and their (same faculty) equivalents can all provide approval. If you do not want to receive these notifications, you can turn off notifications in RMS. See Notifications.

Second reason is that someone submitted a record for approval with your name as the Principal Investigator. In this case, the PI must approve the record before it is sent on to academic approvals.

Can approvers "Designate" someone to do approvals?

Within RMS, approvers do not have the ability to designate someone to approve for them. Approvers have permissions to add Designates, Co-Investigators, or Team Members to a record however, these roles do not have approval authority. The only "Approvers" who can add/designate an alternate approver are the Associate Deans (Research). Research Services and Research Facilitators may also add one-time approvers. The other option is to have an Approver role requested through the PeopleSoft Access Request (PSAR) utility.

How do I approve a Pre-Award application? (also applies to Post-Award approvals)

Once the record is submitted for approval, the approver who is next to approve ('pending approval') will receive a notification in RMS and in their Outlook inbox (providing that option has not been de-selected in the settings dropdown in RMS).

After logging in to RMS, the approver will see pending approvals in their 'Things to do list'. After clicking and expanding the 'pending approvals' list, select the record of interest. The record will open to a single page, labelled 'Key Information'. Navigating to and clicking on Save & Progress will present the status box – the approver may select 'Approved' status or other appropriate status and then click Save & Set Status. If 'Approved' status is selected, the record will now advance to the next approver, if there is one.

Should you wish to review the record in detail, click the blue pencil in the upper right-hand corner on the Key information page. The detailed view which the applicant completed will be visible. After review, click Cancel & Return to return to the 'approval' page.

See also: Pre-Award Approvals, Pre-Award Learning Guide

Does the RMS approval process replace physical signature and the RFAA form?

Yes; for the Competitions designated to be supported by RMS, approvals are electronic. The applicant might need physical signatures for some competitions, which would then be scanned and uploaded into the document section of the Pre-Award record.

Who has the ability to discard/re-sequence approvers?

This can be done by the ADR, RF or RSO, on an occasional basis.

For changes that are for longer duration such as 3 days or longer, use of the PSAR standard process (via MyUofC or ticket to IT) is recommended for changes to approvers. Requests may be submitted for approval by the reports-to manager.

See also: Remove Approvers, Re-sequence Approvers, Access and Login Information

Do approvers that have already approved a record get notified if the record was rejected by an approver after them?

No; they will be able to review the history to see the initial approvals/rejection when the record returns to them to approve again when the PI resubmits.

I submitted an application for approval but my department head has not received it. What am I supposed to do?

A very common reason for this is when the user sets the status of the record (by clicking Save & Progress) to the default status of "In preparation". Should they select Save & set status at that point, the record will not advance as it is kept in the In preparation (draft) stage. To advance the record, they need to purposefully click on "Submitted for approval", then Save & set status to advance the record.

At this point, the department head will then be able to see the submitted record.

See also: Creating a Pre-Award Application, or Find the Status of an Application or Record, or Create Post-Award without Pre-Award

How can an approver such as a Department Head, delegate approver responsibilities while away on vacation, leave, etc.?

RMS does not support "Delegation of approver authority."

An Approval role (or most other roles) must be requested through the PeopleSoft Access Request form (PSAR). The online PSAR form is completed/approved by the individual's manager and then submitted for final approval through PeopleSoft. After final approval, the new role is exported into RMS overnight. This process may take 72 hours or more so it should not be relied upon for last-minute submissions.

In the case of a Department Head being absent, the ADR could delete the Department Head. If two approvers are required, in most cases the Dean would then be populated into the Academic Approvers section in addition to the ADR.

A record is waiting for approvals, why hasn't the status changing to "Submitted for approval"?

When user selects Save & Progress to submit a grant application for approvals, the Status box shows two statuses, "In preparation" and "Submit for approvals", with the "In preparation" status selected (defaulted).
Often users click Save & set status without selecting the new status of "Submitted for approvals" so the record stays in the current state which is "In preparation".

To remedy this, the PI (or whoever is submitting the record for approvals) must open the record and select Save & Progress, then ensure they select the correct status of "Submit for approvals", then click Save & set status. You can verify the status has changed by checking the status of the record in the dashboard or filtered search.

Why can't a record be approved when it is locked?

A Researcher may still be editing the record after they have submitted it for approval; a record is only released if the user cancels out of the record after they have opened, or after 45 minutes have elapsed.

The inverse is also true: if an approver opens a record with the Edit button, which then results in the record being locked by them until they Save & Progress or Cancel out of the record.

End User wants to know status of approvals, but approvals are still queued with no movement; it is possible the PI has the record locked themselves so that approvals cannot happen. See previous solution to unlock the record.

Can approvers change any data in the record?

No; approvers can only add comments, add documents, send back to the PI for more info, or approve/not approve the record.

Where is the Faculty (Internal Peer) Review section listed?

Internal faculty (Peer) reviews are not handled inside RMS. The Approvals page lists a section where the Research Facilitator can identify whether or not an application has been peer reviewed. This is section is also available on the Key Information tab.

Does a Department Head have to look at RMS to see what approvals they must do?

They will receive notifications in their email (if that function is not turned off in RMS) but will have to go into RMS to see the list of approvals pending for them, this will be in their RMS dashboard under their "Things to do" list. They must also go to RMS to provide approval.

See also: Notifications

What happens with submissions that were sent for approval on time but were late due to not being approved by the ADR before the submission (Internal Deadline) date? Is there a notification to the PI and approvers that it is now late?

RSO will receive the record and it will be processed as quickly as possible to meet the sponsor deadline. There is no notification to the PI that it is sent in this scenario. A notification is only sent to the PI when the record submitted is past the RSO Internal deadline.
In a future release, the PI and Approvers will receive late notifications. There will also be functionality to send a Late Notification if RSO determines the application is incomplete even with Academic Approval sign off complete.

What happens after I click the Submit for approval button?

After the user clicks the Submit for approvals button, they must also click the Save & Set Status button to advance the record for Academic Approvals.

Once it is successfully submitted for Academic approvals, typically the approval process encompasses approvals by the Department Head and the Associate Dean (Research). This is however dependent on the faculty and the unique circumstances of the application as there may be more or fewer approvers for the record.

After Academic Approvals are completed, the record is then advanced to the Research Services Office for their review and approval.

In summary, there are numerous review and approval processes that are undertaken after completion of the grant application. For this reason, it is strongly advised all applications are submitted well in advance of the RSO Internal Deadline.

See also: Approval Process, **Pre-Award Learning Guide**

What if the ADR is a team member or Co-I, who will be the approver?

RMS will select the supervisor instead. If the TM submitted on the behalf of the ADR (in their Researcher role), the ADR (as the PI) will become the first line approver. If the ADR submitted (as a Researcher), First line approver will be the DH according to the work affiliation selected by the ADR and then the Dean of the Faculty in question.

After a record is sent for approval, can a deadline be set for the approver to complete the approval, before a scheduled vacation?

No; RSO and the faculty will keep moving the work along. Some departments have opted to list the department head as well as deputy/associate department heads so there will always be an approver at that level. Notifications will be sent to all these approvers in RMS. In addition, an alternate approver may be assigned / delegated using the PSAR process within PeopleSoft. RF's and ADR's can also go into RMS to replace an approver or change the sequence of approvals if need to.

See also: **Pre-Award Learning Guide**, Add / Remove Approvers

Who approves the Pre-Award record if the ADR is a Co-Investigator?

If an ADR is a Co-I on the record, RMS will route the approvals following the normal approval pathway, so the ADR will be able to approve the record even though they are a Co-I.

Rationale: ADRs also have Researcher work affiliations and they are being added to the Co-I field in a 'researcher' role. The ADR work affiliation is doing the final approval (of the Principal Investigator's work), so technically Converis is doing what it is supposed to.

In addition, we can't restrict the ADR from doing the approval because that is an organizational role, as opposed to a person role, so we cannot filter out individual ADRs.

General Information

Where can I find more information about each section or field in RMS?

Click on the small blue question mark that is located to the right of the heading or field. If help text is available, a popup with information will display. There are also a number of training and/or support documents available on the RMS website.

What is the maximum character limit in a field for comments?

The project team has tested up to 4000 characters in a Comments field. Anything longer and be put in a document and uploaded/attached to the record.

See also: Adding or Deleting Attachments

How do I upload a new version of a document?

Previously, there was a function in RMS that enabled users to upload a new version of the same document. This function has been removed because all document versions were not required to be kept. Simply upload a new document and you can choose to delete the old one.

See also: Adding or Deleting Attachments

Does an uploaded document need to be in a specific format?

Standard document formats such as PDF, Word, PowerPoint and Excel are supported, in addition to other less common file formats such as JPEG (JPG). Text files (*.txt) are not. There are no file size limitations enforced.

Are RMS notifications connected to Outlook? Do I get an email when I get an RMS notification?

Yes, but you cannot respond through Outlook, only through the Notifications Inbox (Left Hand navigation panel). All notifications will appear within RMS in the notifications section and responses can be managed through RMS where needed.

See also: Notifications

Will matching funds be available?

Matching funds will be part of a future release.

How are Department Head institutionally-held awards handled in RMS?

This functionality is currently under development and will be ready for a future release.

Do Emeritus and Adjuncts automatically receive a Researcher role?

Yes.

What if all of the Ethics details are not known at the time of creating Pre-award record?

Further changes to the Ethics section and other fields can be made once the record is in the Post-award stage.

Why are there 'start' and 'end' dates for personnel in RMS?

Start and End dates are populated from PeopleSoft. In RMS, it's important to know that those involved in the application / project are still active. If a Researcher, notices that the End Date is populated with a date for an assigned Team Member, it serves as an alert to ensure that person maintains their 'active' status.

Why does this record show that it is locked by another user?

A record can only be edited by one person at a time.

This lock is in place for 45 minutes after the user stops editing the record or does not log out. If access to the record is needed prior to that 45 minute period, contact the other user to release the record by having them open the record by selecting 'edit' and then selecting 'Cancel' which will then free the record.

How do I know that a record is locked by another user?

The status of the record will indicate that it is locked for editing by another user by a message at the top of the Dashboard. The message reads "Currently being edited by <u>user</u>"

What can be done if the record is locked when submitting late for a deadline?

The person who has the record locked will be indicated on the top of the screen. You may contact the other user to let them know that they have it locked. They will need to open up the record and exit it properly by either clicking Save and Progress, or cancel out of the record.

Note: if a user is in edit mode for a record, switching to dashboard will still keep the record locked. The record will remain locked for 45 minutes if the user does not exit properly.

Who can be added as a team member? How?

Anyone with a UCID can be given a team member role

How?

The role is generally automatic for a Researcher or roles such as Admin support (Team Member). From the Team Member section of the Pre-Award Application:

- Click the blue "+" icon
- A search field will open, enter the name of the Team Member you wish to add
- RMS will produce a list of names to choose from
- Select the name of the Team Member you wish to add by clicking the blue "+" icon

If the name of the person to add as a team member does not show up in the list, they may need to be added as researcher or team members through PeopleSoft (external to RMS), as described here. This can be done through PSAR (PeopleSoft Access Request) as a request entered directly from their reports-to manager or via an IT HelpDesk ticket to be approved through PSAR by their reports-to manager. The data from PeopleSoft is exported to RMS on a nightly basis – so you may check the next morning after the approvals have been completed.

Depending on the faculty / department involved, special configurations within RMS may also be required for some roles.

I have been using the Filter function in RMS and can't seem to do anything else. It seems 'stuck' on the filter. What can I do?

When you first click Dashboard > Awards Management > Pre or Post Award, the Filter icon is blue. When you create and apply a filter, the filter icon turns orange to indicate a filter search has been initiated.

In order to clear that filter, click the Reset button. This clears the filter search elements, the filter icon becomes blue again and you may continue your work.

See also: Search Filter

What if the Principal Investigator (PI) is at another university and the researcher at the UofC is the Co-Investigator (Co-I)?

The UofC researcher would complete the application in RMS as the PI (listed in RMS as the PI) and the other university follows their process as the PI at their institution.

See also: **Pre-Award Learning Guide**

Can the PI be from a different University/Institution than the Co-I?

Yes. If the primary funding is awarded to a different institution where the PI is located, but the Co-I is a researcher at UofC, the portion of funding for UofC will be tracked with RMS where the UofC researcher enters the record into RMS as the PI.

Can a Co-I be from a different faculty than the PI?

Yes. Approvals will be based on PI faculty Department Head/ADR and not the Co-I.

Is there a way to see which users have contributed to or edited a record?

Yes, you can. There is an Audit trail function in RMS. Navigate to the record of interest: Dashboard > Awards Management and select either Pre-Award or Post-Award and then search for the record. Open it by clicking Edit.

In the top banner area, the record will display the RMS number, project title and your name. Immediately below them is the record's status and an "Admin Info" button. Click on "Admin Info" and then click "Status Log." The 'Audit trail' will then display.

Can a researcher see if a designate has changed their record?

The record will appear in the recently edited list; there isn't a change history showing what had changed.

Will we still be using RFAAs for internal and Tri-Council grants?

Yes; when the RMS release designed to support them is deployed.

Can a designate get the email notifications sent to the PI?

No; designates may access the Pre-Award application but cannot view emails notifications of the PI.

As a Designate, will I see all the researchers I have created an application for?

You will see all records in your pre-award list that are attached to the investigators for which you are a designate. You may apply filtering rules to find a specific record or to find only those that belong to a certain PI.

Can a record / application be re-assigned from one Grants Officer (GO) to a different Grants Officer?

Yes, the assigned Research Services contact may be changed by navigating to the Pre-Award Administration section, discarding the current GO and adding the desired GO and then progress the record.

Letter of Intent (LOI)

I submitted a LOI in RMS. Does it need to get academic approvals?

Yes. It will require academic approvals the same as a Pre-Award Application.

I submitted a LOI in RMS. Do I need to also submit a Pre-Award/Application?

After your submitted RMS Letter of Intent is invited for full application, RMS will automatically create a related Pre-Award/Application. Some information will transfer to the new record however you will need to complete the Pre-Award/Application.

Pre-Award

When creating a new pre-award record, why does 'Grant Full Application' have to be selected twice?

This is currently setup for single sponsor applications. Once multi-sponsor options are available there will be other options below each selection option.

Can I upload a signature page into RMS or is the separate RSO signature page upload still valid?

Documents relating to a Pre-Award, including signature pages (if required for that competition), should be uploaded to the document section in RMS. This signature page is sometimes referred to as a 'Wet Ink' page, indicating physical signatures must be obtained, not digital approval signatures through RMS.

Can a placeholder amount be used in the Cash Requested field if the budget is not finalized?

Yes; the Cash Requested field can be updated prior to Submitted for Approval; after that only documents can be uploaded to the record until final submission to the agency, for example, the final budget document. Placeholder amounts can be used to progress a record through submission for approvals. It is understood that budgets may not be finalized at the time of grant application. Amendments to the amount requested are also possible, as well RSO may return the record to the PI for changes. However, the accuracy of the amount requested is important for future statistics and planning. In particular, in regard to how much money is requested vs. the amount actually awarded.

After a Researcher enters a budget and overhead amount for approvals, the numbers may change after it has already been approved - can this be corrected?

Yes. RSO can correct this if needed, or send it back to the PI for change. The PI may also upload the final budget document (prior to Submit to Agency status).

Does the same (project) title need to go into RMS as in EFIN and PeopleSoft?

Yes - when entering a title, keep in mind that the title used in RMS will be used to create the PS project and will be used in eFIN.

See also: **Pre-Award Learning Guide**

How many records are required when there is both a Letter of Intent (LOI) and a Pre-award Application?

Two records are required as there are two sets of approvals. They can however be linked together. If the LOI applicant was invited for full application, RMS will auto-generate a Pre-Award record to link the two together.

Will the system check for duplicate applications?

No, this functionality does not exist in RMS. This would be a manual check that RSO would complete when they review an application. Researchers and their teams also need to be aware to check for duplicate entries.

Why is the Agency section not auto-filling after a Funding Opportunity has been selected?

This issue has been addressed and should not require manually populating the Agency section. However, should this occur the following steps will be needed:

Select the funding opportunity as per the user guide, then copy/paste the agency from the funding opportunity table into the Funding agency search field. The system will present a list of results. Click the "+" to select the agency which will then populate the agency section.

How do I identify the status of a Pre-Award application?

Search for the record (either in the Dashboard Things to Do list, the Recently Edited Items list, or from the Award Management (left Menu) under Pre-Award Applications. From the Pre-Award/Applications page, the status will be displayed to the right of the project name.

Once the record is opened, the status will display on the top of the page, in the top banner underneath the project name.

See also: Find the Status of an Application or Record

Can a Researcher add a Funding Opportunity?

Yes. Anyone with the ability to create a new pre-award record can add a new funding opportunity from within the pre-award application while filling out the record.

See also: Create New Funding Opportunity in Pre-Award

Some applications are submitted to the agency online – does RMS replace this process?

No; RMS is replacing the RFAA process and will track and help facilitate the submission process but does not replace submitting the application to the agency, that still needs to happen after all approvals and reviews are done in RMS.

See also: **Pre-Award Learning Guide**

When the ethics questions are answered affirmatively, who gets notified?

A notification is not sent out, but the record is linked to IRISS, and the RSO team will review the application after academic approvals are completed.

See also: **Pre-Award Learning Guide**

Can I withdraw an application even after approvals have passed?

Yes, an application can be withdrawn while RSO is still reviewing the record, up to the point where it has been assigned a status of 'Approved for Submission'.

I am a Team Member submitting an application for my PI. I either got kicked out of the record or when I save the record, I can't see it again. Why can't I see it anymore?

The most common reason for this is when a Team Member creates an application for an Investigator, there are two key role changes that must be completed. When the TM creates the application, they will be listed as the applicant (the PI). They will need to delete themselves as the applicant and add the correct PI.

The second critical role change is they will need to add themselves into the Team Member section. If they do not, they will not be able to access the record again. This (missed) step is why the TM can not regain access to that record.

Post-Award

Are there any situations where inclusion of a 'funding opportunity' is not required?

Including a funding opportunity is optional for internal or contract funding which are post-award only.

How do I identify the status of a Post-Award/Project?

Search for the record (either in the Dashboard Things to Do list, the Recently Edited Items list, or from the Award Management (left Menu) under Post-Award/Projects. From the Post-Award/Projects page, the status will be displayed to the right of the project name.

Once the record is opened, the status will display on the top of the page, in the top banner underneath the project name.

See also: Find the Status of an Application or Record

When the ethics questions are answered affirmatively, who gets notified?

A notification is not sent out, but the record is linked to IRISS, and the RSO team will review the application if this field is checked

See also: Adding/ Removing an Ethics Certificate

Can I see my BioSafety Permit?

You may see your permit by navigating to the Dashboard, where your name is visible on the banner. Click 'Edit' beside your name, a page will open that has several tabs listed including Permits. Click on the Permit tab, which will then display your Biosafety permits.

The person who initially creates the post-award record is who will be listed as the permit holder. For example, if a Team Member or Co-Investigator creates the record, they will be listed as the permit holder. This can be corrected by RSO during their review of the Post Award record. Your permit will attach to the record if you have one and you are the person creating the record.

See also: Adding and Ethics Certificate to Existing Record

Can I see the ethics certificates of other researchers?

No; you can only see your own certificates or the certificates for another project where you have been a Co-Investigator.

If updates to certificates are needed for a project, only the PI and RSO may add or delete certificates from the record. Team members and delegates cannot update ethics certificates on behalf of the PI.

Do I need to have all of my ethics certificates attached to my post-award/project?

No, you can progress a post-award record all the way to project maintenance and PeopleSoft without ethics certificates attached because these can be uploaded at a later date. A project may qualify for Early Release of Funds (ERF), which allows access to a maximum of 50% of the total budget for certain start-up expenses prior to certificate(s) being approved. If the project qualifies for ERF, the PI has up to 6 months to obtain certification approvals and associate them in RMS.

Troubleshooting

<div style="border: 2px solid red; padding: 10px;">

When working in RMS, I have noticed that a large part of the online form will disappear – only the field with the application type is visible. What do I do?

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This is a recently discovered bug (January 2020) and is being fixed by the software vendor. The problem may also display with the wrong application type. Re-select the correct application and then click Save.

If the application type is correct, then just click Save.

The online form should then display properly.

Typically the error displays as follows (with the wrong application type) and other fields missing:

<div style="border: 2px solid red; padding: 10px;">

An error occurred when an approver was changed or added. What should I do?

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There is a specific scenario which may cause this error to occur when an approver is removed from the approval workflow. This has only be noticed under the following circumstances:

When a Department Head (DH) is deleted from the approval chain, and then a DH is added back to the approval chain in the first spot, there may be a system error. The result is that upon returning the record, the DH can approve the record and when the record is saved, they will need to approve it again

in order to progress the record to the next level of approvals. The record can progress to the next person but it requires the DH to approve it twice.

An error occurred when I set the status of a pre-award to <u>Awarded</u>. What should I do?

If an error or unexpected behaviour occurs when setting a status to <u>Awarded</u>, do not press back and try to set the status to <u>Awarded</u> again. This may result in the creation of two identical Post-Award records. You should exit the browser, return to RMS and locate the record. If it is Awarded, no action is required. If it still shows the status Submitted to agency (or Approved for submission) then you can attempt to set the status to Awarded again. It may be helpful to think of this step like paying for something online; you do not want to resubmit the payment page or you could be charged twice.

I don't see the record that I need to approve even though I got a notification that something needs my approval.

This is likely due to you being logged in on the wrong profile. Many approval roles will also have another role in RMS (e.g., researcher) so you need to make sure you are in the correct role.

In the top right corner, click on your name (or title) and then click on **Switch Role**. Choose the correct role that you need to approve the record.
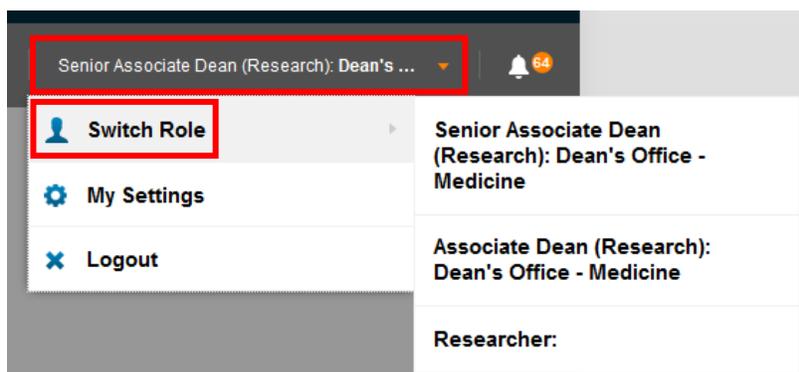
The PDF document that was uploaded to RMS is not displaying properly for a user that downloaded it.

There may be an issue unrelated to RMS that causes Adobe/PDF-like document type that was created on a Mac to not display properly on a PC. When you use the 'preview' function it shows up as if fields are 'missing' when you open it with a PC unless you click in the field and then you can see the data. Once you re-save it as a PDF, then all fields are filled appropriately.