



Researcher User Manual

Creating a New Application

Group: Institutional Animal Care Committee (IACC)

Audience: Principal Investigators & Project Team Members

PLEASE NOTE

Prior to leveraging the material in this manual, please make sure you have completed and understand the Basic User Manual. The manual can be found [here](#) on the Tools and Resources website.

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Avoiding Data Loss

To avoid data loss, do **NOT** use the symbols < or > when entering information into the Researcher Portal. These symbols are unsupported.



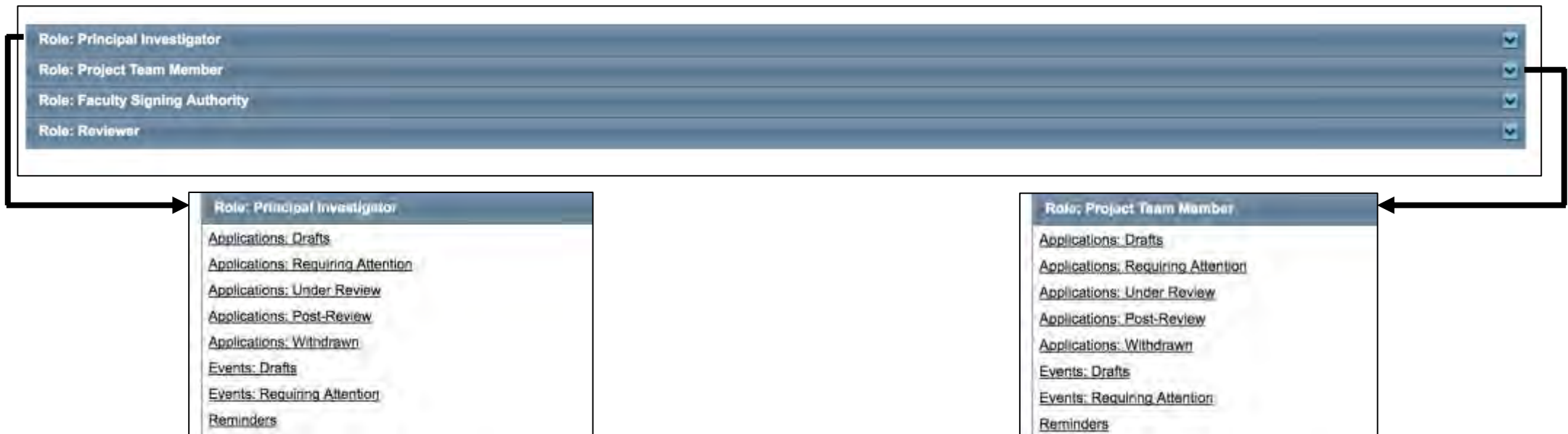
Using these symbols can cause issues such as loss of work and/or error messages.

Note that saving errors may occur, even if you do not receive an error message.

PI or Project Team Role Block

When you login to the Memorial Researcher Portal you will see the Home Page. The ***Principal Investigator (PI) and Project Team Member Role Block*** provides links that will direct you to application forms where you are a PI or project team member. All project team members can contribute to an application form prior to submission, however project team members cannot submit the application.

Only the PI can submit an application.



PI or Project Team Role Block Cont'd

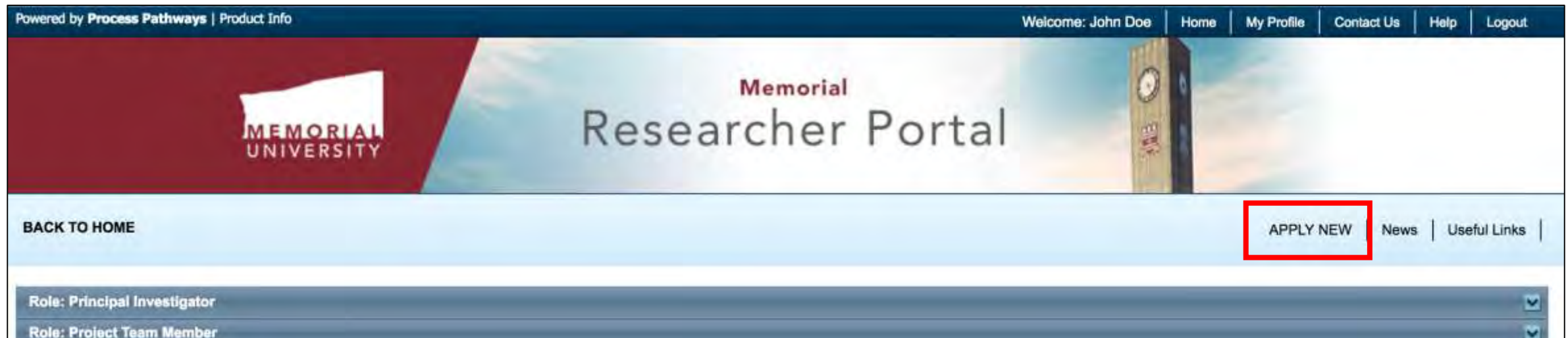
- **Applications: Drafts:** This link contains ethics and funding applications in-progress that are saved but not yet submitted for review. Applications here can still be edited by the Principal Investigator or Project Team members.
- **Applications: Requiring Attention:** This link contains ethics and funding applications returned to the Principal Investigator and Project Team for revisions. Depending on the application type, these may have been returned by a signing authority, an ethics office or by the Research Initiatives & Services (RIS) department. The Principal Investigator and Project Team members can edit these applications.
- **Applications: Under Review:** This link contains ethics and funding applications submitted by the Principal Investigator and are currently under review. These applications are read-only.
- **Applications: Post Review:** This link contains post-review ethics and awards applications. These applications are read-only, however the Principal Investigator and Project Team Members can submit Event forms for these files, as well as Clone them.
- **Applications: Withdrawn:** This link contains applications that the Principal Investigator has withdrawn.

PI or Project Team Role Block Cont'd

- **Events: Drafts:** This link contains Event forms in-progress that are saved but not yet submitted for review. Event forms here can still be edited by the Principal Investigator or Project Team members.
- **Events: Requiring Attention:** This link contains Event forms returned to the Principal Investigator and Project Team for revisions. Depending on the Event form type, these may have been returned by a signing authority, an ethics office or by the Research Initiatives & Services (RIS) department. The Principal Investigator and Project Team members can edit these forms.
- **Reminders:** This link contains ethics and funding files that have a deliverable due such as an annual renewal or report. The Principal Investigator and Project Team members can submit these as Event forms.

How to Start a New Application

Click the **APPLY NEW** button in the Middle Navigation Menu on the Memorial Researcher Portal Home Page.



New Application Forms

You will be brought to the New Application Forms page. The application names are hyperlinked.



To start a new application, click the name of the application you wish to complete. You may have to scroll down the page to find the appropriate application.

Institutional Animal Care Committee (IACC)

Application Name	Description	Status
Animal Use Protocol Form	Researchers who will be conducting research, testing or teaching projects at MUN, MI, OSC, Bonne Bay, or in the field involving the use of animals are required to obtain research ethics approval before commencing the project. The approval process starts with the submission of an Animal Use Protocol Form.	Open

Once you select the application name a new application will be launched.

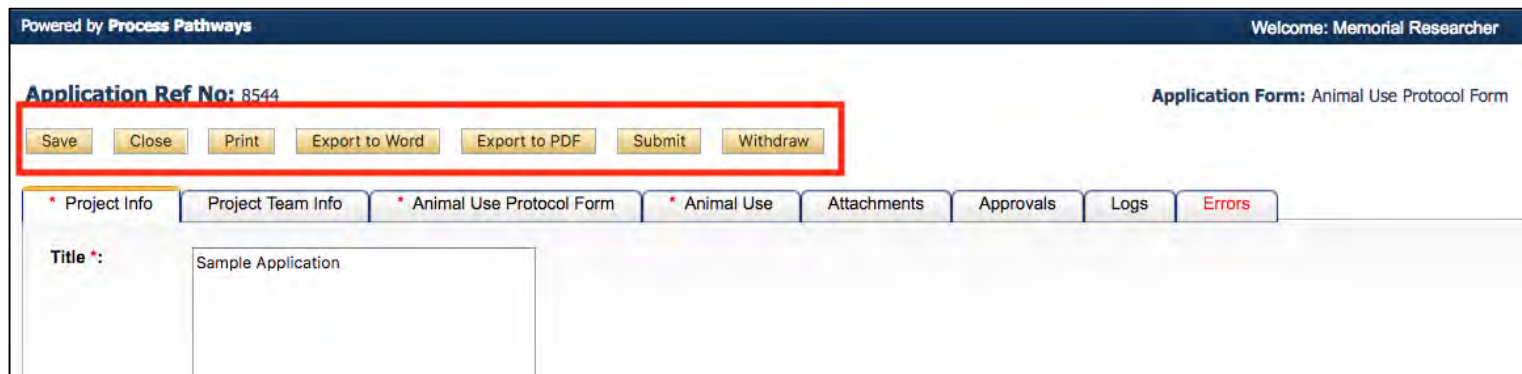
Application Action Buttons

The buttons that appear at the top of an application are the **Application Action** buttons. Select these buttons to:

- **Save:** Save any changes to the application.
- **Close:** Exit the application and return to the Memorial Researcher Portal Home Page.
- **Print:** Print the application in the pre-set layout.
- **Export to Word:** Open the application as a Word Document.
- **Export to PDF:** Open the application as a PDF.
- **Submit:** Submit the application to the pre-routed body.
- **Withdraw:** Withdraws the application and moves the application to Applications: Withdrawn.

Invalid Characters: < or >

The < or > are invalid characters that cannot be used in the text areas within the Researcher Portal. If a researcher or reviewer tries to save text responses using these unsupported characters, it's probable they will prompt an unsupported character error.

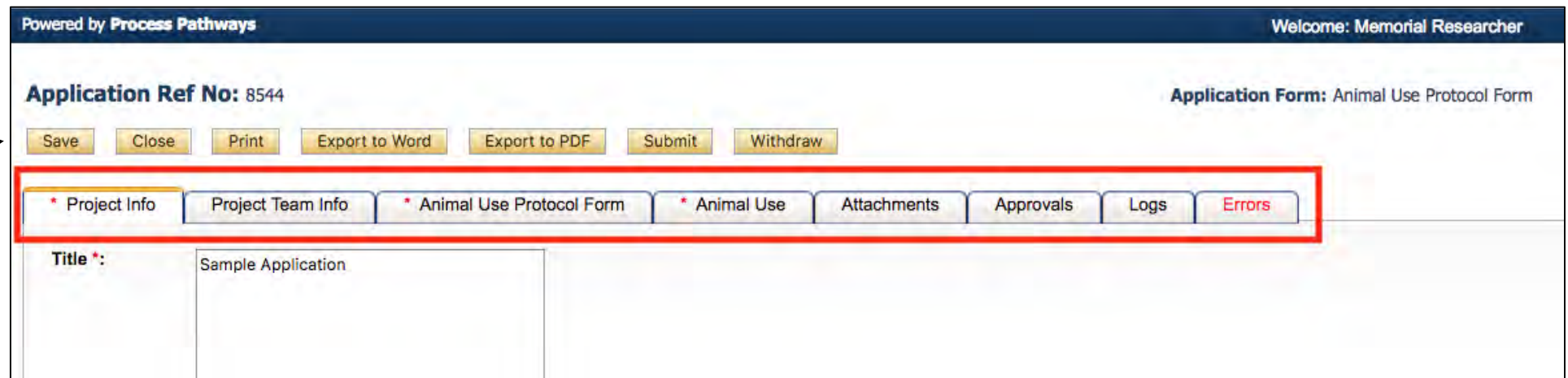


The screenshot displays the Memorial Researcher Portal interface for an application. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". The application reference number is "8544" and the form is titled "Animal Use Protocol Form". A red box highlights the "Application Action" buttons: Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. Below the buttons is a navigation bar with tabs for Project Info, Project Team Info, Animal Use Protocol Form, Animal Use, Attachments, Approvals, Logs, and Errors. The main form area shows a "Title *" field with the text "Sample Application".

Application Tabs

At the top of any application is a list of tabs that you will complete prior to submitting the application. A tab that has a **red asterisk *** indicates that there are required field(s) that must be completed prior to submission. Once you complete all the required fields in that tab, the asterisk will disappear. The subsequent slides will further explain each individual tab.

NOTE: Click save as often as possible while completing your application!

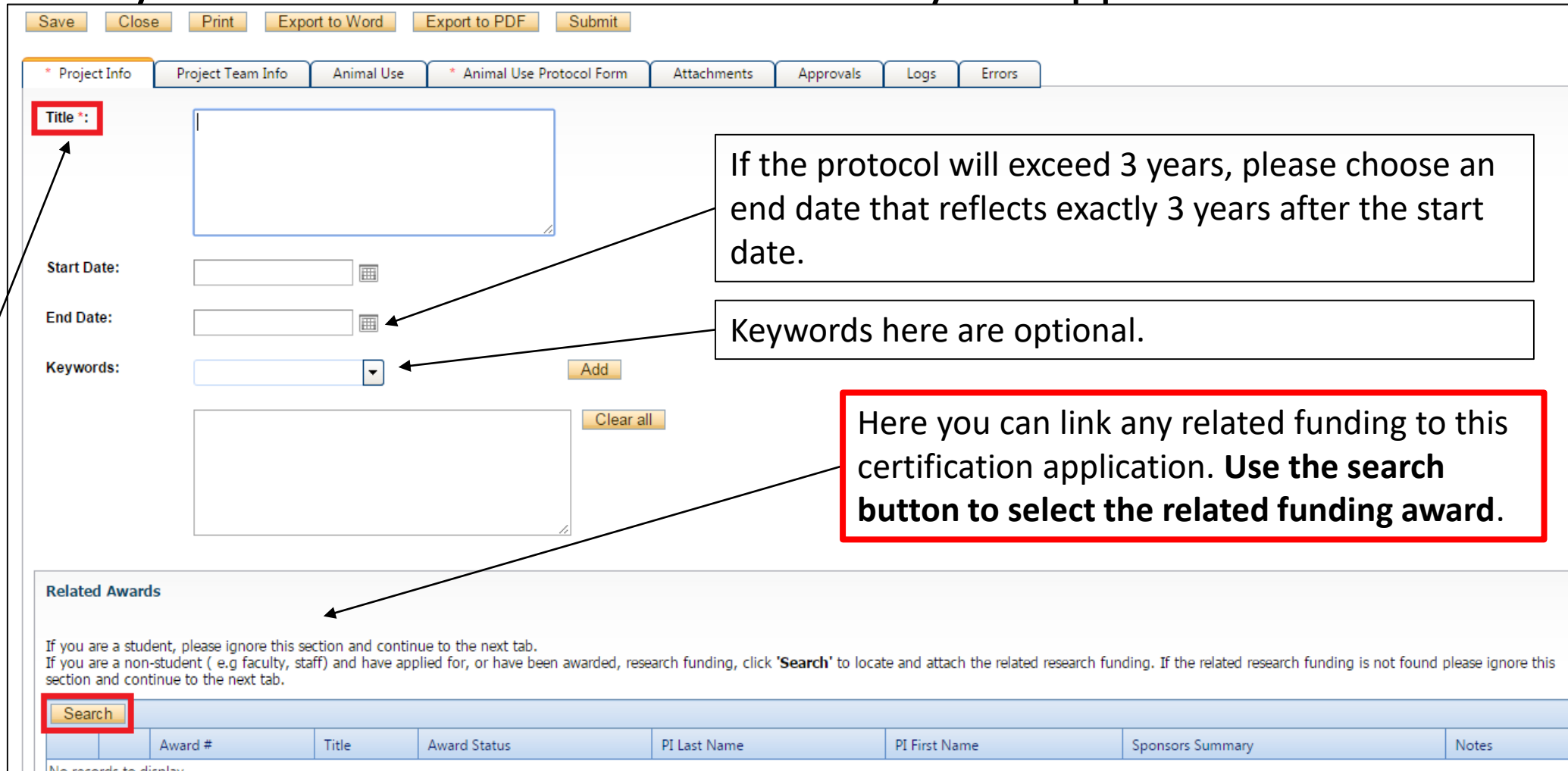


The screenshot shows the application interface for Memorial Researcher Tools & Resources. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". Below that, the "Application Ref No: 8544" is displayed on the left and "Application Form: Animal Use Protocol Form" on the right. A row of buttons includes "Save", "Close", "Print", "Export to Word", "Export to PDF", "Submit", and "Withdraw". Below the buttons is a horizontal list of tabs: "* Project Info", "Project Team Info", "* Animal Use Protocol Form", "* Animal Use", "Attachments", "Approvals", "Logs", and "Errors". A red box highlights the tabs with asterisks. Below the tabs, a form field for "Title *" is visible, containing the text "Sample Application".

Project Info Tab

This tab is where you enter basic information about your application.

IMPORTANT: Please note that all fields that have a red asterisk * are required. Failing to complete these fields will prevent the PI from submitting the application. See [Errors Tab](#) for more information.



Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Animal Use * Animal Use Protocol Form Attachments Approvals Logs Errors

Title *

Start Date:

End Date:

Keywords: Add

Clear all

Related Awards

If you are a student, please ignore this section and continue to the next tab.
If you are a non-student (e.g faculty, staff) and have applied for, or have been awarded, research funding, click '**Search**' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

Search

Award #	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
No records to display						

If the protocol will exceed 3 years, please choose an end date that reflects exactly 3 years after the start date.

Keywords here are optional.

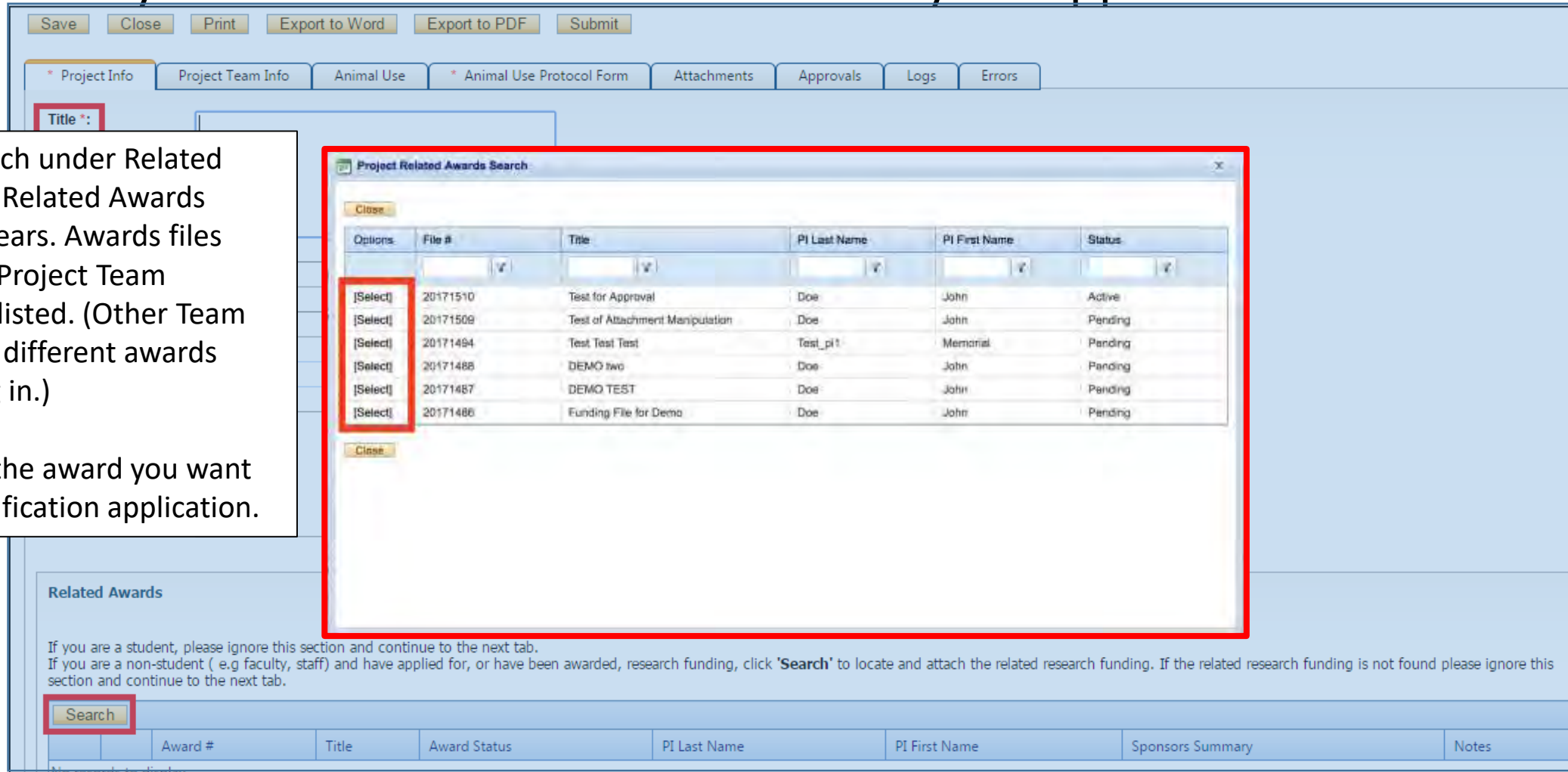
Here you can link any related funding to this certification application. **Use the search button to select the related funding award.**

Project Info Tab Cont'd

This tab is where you enter basic information about your application.

When you click Search under Related Awards, the Project Related Awards Search window appears. Awards files that you were PI or Project Team Member for will be listed. (Other Team Members may have different awards listed when they log in.)

Click Select next to the award you want to link with the certification application.



The screenshot shows the 'Project Info' tab in a web application. At the top, there are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. Below these are tabs for 'Project Info', 'Project Team Info', 'Animal Use', 'Animal Use Protocol Form', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Project Info' tab is active, and a 'Title *:' field is visible. A 'Project Related Awards Search' window is open, displaying a table of awards. The table has columns for 'Options', 'File #', 'Title', 'PI Last Name', 'PI First Name', and 'Status'. The 'Options' column contains '[Select]' for each row. The 'Related Awards' section below the search window contains a 'Search' button and a table with columns for 'Award #', 'Title', 'Award Status', 'PI Last Name', 'PI First Name', 'Sponsors Summary', and 'Notes'. A red box highlights the search window and the 'Search' button.

Options	File #	Title	PI Last Name	PI First Name	Status
[Select]	20171510	Test for Approval	Doe	John	Active
[Select]	20171509	Test of Attachment Manipulation	Doe	John	Pending
[Select]	20171494	Test Test Test	Test_pi1	Memorial	Pending
[Select]	20171488	DEMO two	Doe	John	Pending
[Select]	20171487	DEMO TEST	Doe	John	Pending
[Select]	20171486	Funding File for Demo	Doe	John	Pending

Project Info Tab Cont'd

This tab is where you enter basic information about your application.

Once added, award information will display under Related Awards on the Project Info tab.

To add notes about the award, click **Edit**. *You cannot change any other information about the award.*

To remove the link to the award from the application, click **Delete**.

Related Awards

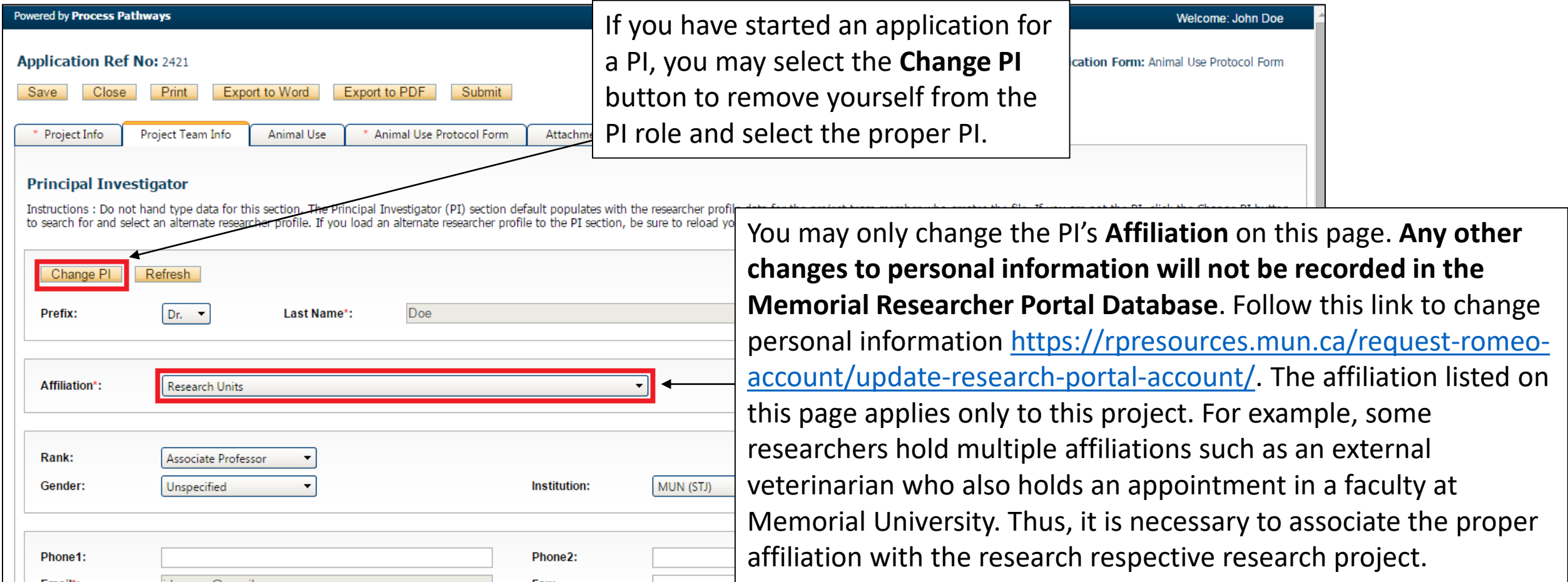
If you are a student, please ignore this section and continue to the next tab.
If you are a non-student (e.g faculty, staff) and have applied for, or have been awarded, research funding, click '**Search**' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

Search		Award File No	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
Edit	Delete	20171486	Funding File for Demo	Pending	Doe	John	SSHRC Program: Research Type: Grant Requested: CAD 0.00 Awarded: CAD 0.00 PROJECT TOTALS:	

Note to researchers with awards with confidential components: Keep in mind that basic information about the linked award, as seen in the example above, will be visible to all Project Team Members on your ethics application.

Project Team Info Tab

This tab will allow you to add and change members on your research team.



Powered by Process Pathways

Application Ref No: 2421

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Animal Use * Animal Use Protocol Form Attachments

Welcome: John Doe

Application Form: Animal Use Protocol Form

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile. To search for and select an alternate researcher profile, click the Change PI button. If you load an alternate researcher profile to the PI section, be sure to reload your data.

Change PI Refresh

Prefix: Dr. Last Name*: Doe

Affiliation*: Research Units

Rank: Associate Professor

Gender: Unspecified Institution: MUN (STJ)

Phone1: Phone2:

Email: Fax:

If you have started an application for a PI, you may select the **Change PI** button to remove yourself from the PI role and select the proper PI.

You may only change the PI's **Affiliation** on this page. **Any other changes to personal information will not be recorded in the Memorial Researcher Portal Database.** Follow this link to change personal information <https://rresources.mun.ca/request-romeo-account/update-research-portal-account/>. The affiliation listed on this page applies only to this project. For example, some researchers hold multiple affiliations such as an external veterinarian who also holds an appointment in a faculty at Memorial University. Thus, it is necessary to associate the proper affiliation with the research respective research project.

Researchers with Multiple Affiliations

- An affiliation is the University faculty that the research and researcher is associated with. This is considered an internal affiliation. If the research is not associated with a University faculty it is considered External. Researchers may have multiple affiliations.
- If your account does not have the appropriate affiliation in the drop down menu or you require an additional affiliation please submit the Update Research Portal Account Form at <https://rpresources.mun.ca/request-romeo-account/update-research-portal-account/>

Rank and Institution

Depending on the research and affiliation, a researcher's rank and institution may change. You may change the rank and institution for the application by selecting the drop down menus on the Project Team Info Tab.

Application Ref No: 2421 Application Form: Animal Use Protocol Form

Save Close Print Export to Word Export to PDF Submit

* Project Info **Project Team Info** Animal Use * Animal Use Protocol Form Attachments Approvals Logs Errors

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile data for the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the Other Project Team Info section below.

Change PI Refresh

Prefix: Last Name*: First Name*:

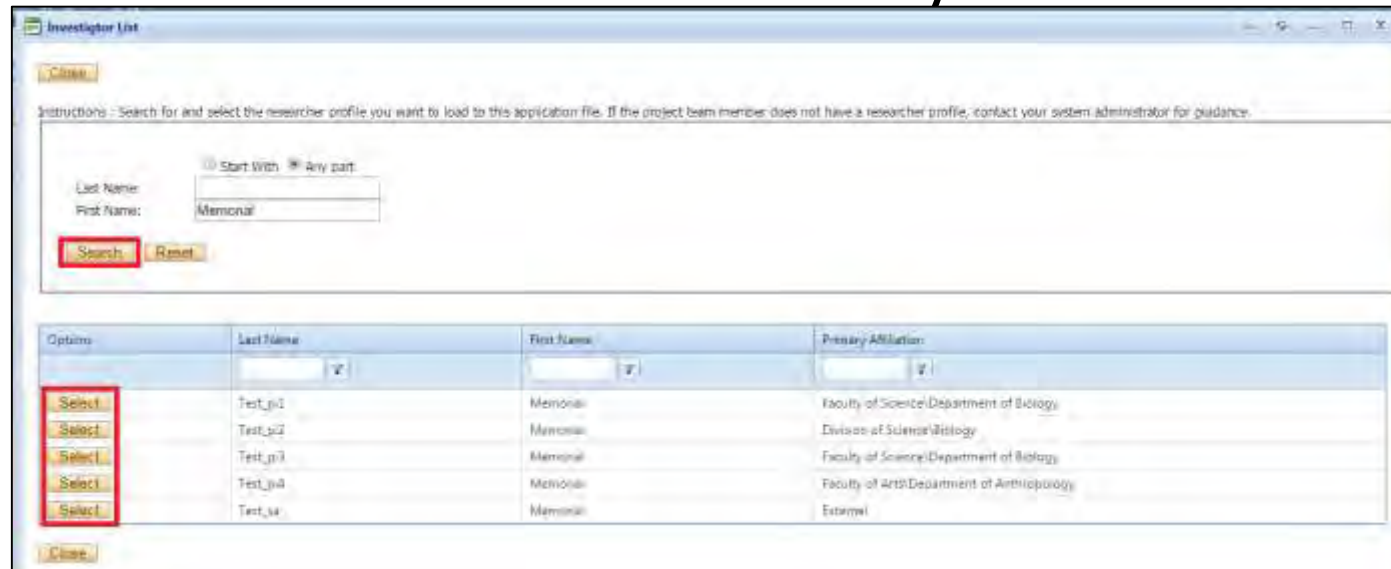
Affiliation*:

Rank*:

Gender: **Institution***:

Changing the PI of an Application

When you click the **Change PI** button on the Project Team Info Tab a new window will appear. In this window you will search for the Principal Investigator and click **Select**. DO NOT manually enter the PI's information.



The screenshot shows a window titled "Investigator List" with a search form and a table of results. The search form includes fields for "Last Name" and "First Name" (containing "Memorial"), a "Search" button, and a "Reset" button. The table below has columns for "Options", "Last Name", "First Name", and "Primary Affiliation". The "Options" column contains "Select" buttons for each row, which are highlighted with a red box. The table data is as follows:

Options	Last Name	First Name	Primary Affiliation
Select	Test_p1	Memorial	Faculty of Science/Department of Biology
Select	Test_p2	Memorial	Division of Science/Biology
Select	Test_p3	Memorial	Faculty of Science/Department of Biology
Select	Test_p4	Memorial	Faculty of Arts/Department of Anthropology
Select	Test_p4	Memorial	External

Follow the instructions in the following slides to add yourself as a Project Team Member once you have removed yourself as the PI.

Adding a Project Team Member

You are required to list all project team members in the Project Team Info tab. You may add two types of project team members to your project:

1. Project team members that will have the ability to sign into the Memorial Researcher Portal to view and edit the application.
2. Personnel that will **not** have the ability to view or edit the application.

Follow the instructions in the subsequent slides to appropriately add project team members. If the Project Team Member will be accessing the application through the Memorial Researcher Portal, please ensure they have an account. If not, they must submit a Memorial Research Portal account request at

<https://rpresources.mun.ca/request-romeo-account/>.

Adding a Project Team Member Cont'd

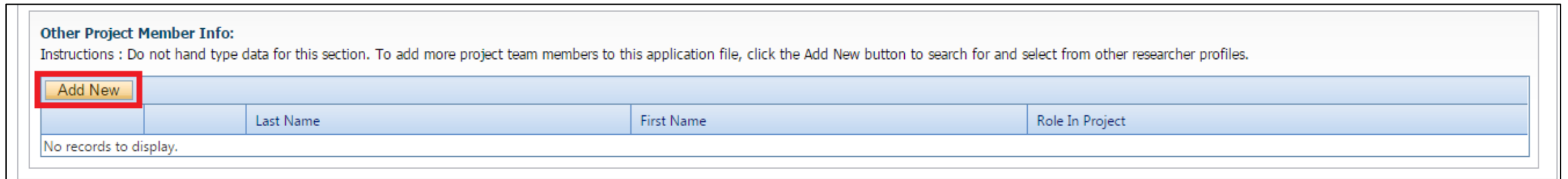
You are required to list Project Team Members in the Project Team Info tab that will have the ability to view and edit the application. This also includes Project Team Members responsible for submitting events and ordering animals.

All Project Team Members (including those listed in the Project Team Info tab) should be listed on the Personnel Training tab under the Animal Use Protocol Form. These Project Team Members are students or staff that are interacting with live animals.

Follow the instructions in the subsequent slides to appropriately add Project Team Members. If the Project Team Member will be accessing the application through the Memorial Research Portal, please ensure they have an account. If not, they must submit a Memorial Research Portal account request at <https://rpresources.mun.ca/request-romeo-account/>.

Adding a Project Team Member Cont'd

To add Project Team Members whom you **want to have access to the file**, click **Add New** at the bottom of the Project Team Info Tab.

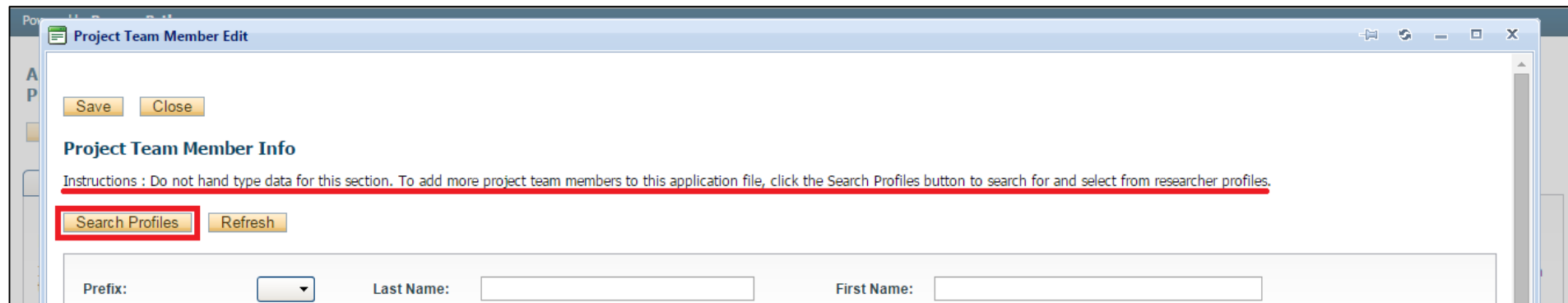


Other Project Member Info:
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Add New

Last Name	First Name	Role In Project
No records to display.		

A new window will appear. Use the search button to add a member to the project team. **You must use the search button to give a team member access to the application!**



Project Team Member Edit

Save Close

Project Team Member Info
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles.

Search Profiles Refresh

Prefix: Last Name: First Name:

Adding a Project Team Member Cont'd

The Investigator List Window will open. Use the Last Name text box to type in the Project Team Members' last name and click **Search**.



The screenshot shows a window titled "Investigator List". At the top left is a "Close" button. Below it is a line of instructions: "Instructions : Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance." Below the instructions is a search form with a "Start With" dropdown menu set to "Any part". There are two text input fields: "Last Name" and "First Name". The "Last Name" field is highlighted with a red rectangle. Below the input fields are "Search" and "Reset" buttons.

When you find the Project Team Member, click the **Select** button next to their name.

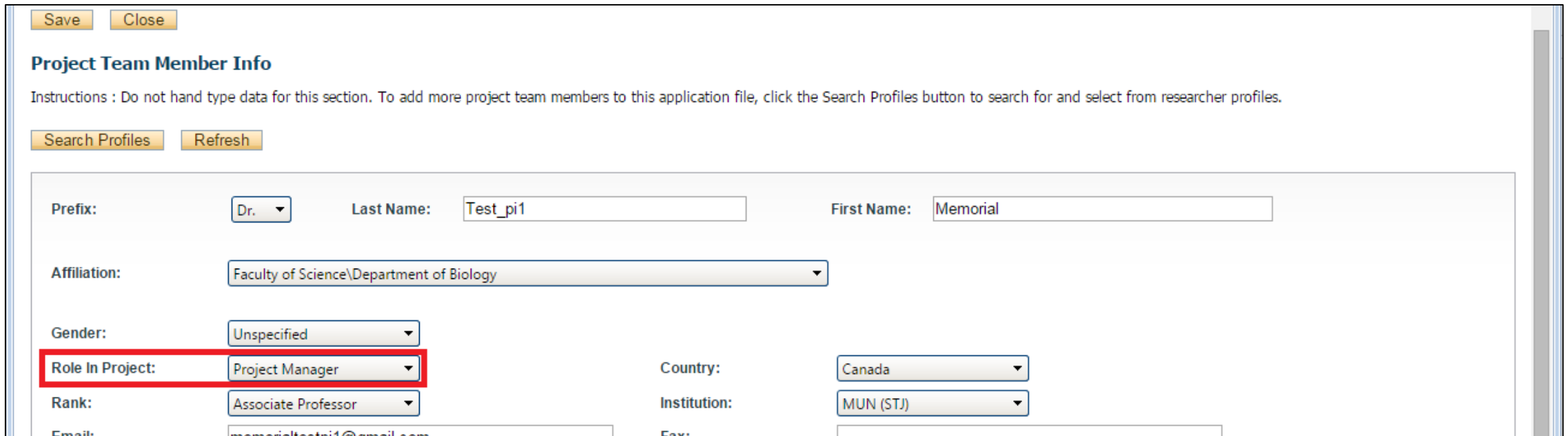


This screenshot shows the same window as above, but with search results. The "Last Name" field contains "test_pi1" and the "First Name" field is empty. The "Search" and "Reset" buttons are still present. Below the search form is a table with the following data:

Options	Last Name	First Name	Primary Affiliation
Select	Test_pi1	Memorial	Faculty of Science\Department of Biology

Adding a Project Team Member Cont'd

Once you select the Team Member, their information will appear. Select the Team Members **Role in Project**, then click **Save**.



The screenshot shows a web form titled "Project Team Member Info". At the top left are "Save" and "Close" buttons. Below the title is an instruction: "Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles." Below this are "Search Profiles" and "Refresh" buttons. The form fields are: Prefix (Dr.), Last Name (Test_pi1), First Name (Memorial), Affiliation (Faculty of Science\Department of Biology), Gender (Unspecified), Role In Project (Project Manager, highlighted with a red box), Rank (Associate Professor), Country (Canada), and Institution (MUN (STJ)). There are also fields for Email and Fax, which are partially visible.

Once you have saved, check at the bottom of the Project Team Info Tab to ensure the Project Team Member has been added.

Adding a Project Team Member Cont'd

- If one of your Project Team Members *who will require access to your application* does not have a Memorial Researcher Portal account, direct the Project Team Member to <https://rpresources.mun.ca>. On the website, they will select and follow the steps in **Request a Memorial Researcher Portal Account** under Memorial Researcher Portal Account.
- If one of your Project Team Members has a Memorial Researcher Portal account but does not appear in the database using the search button, **DO NOT manually add the Project Team Member**. Please submit a help desk ticket at <https://rpresources.mun.ca/help/> to seek assistance.
- Make sure to notify team members when you have added them to an application. **There is no system-generated notification for team members.**

Adding a Project Team Member Cont'd

If you are adding a personnel member who you do **not** want to have access to the application in the Memorial Researcher Portal, you will type their name and project role in the Principle Investigator Comments box. This box is near the bottom of the Project Team Info tab.



Primary Address:

Alternate Address:

Preferred Address: Primary Address Alternate Address

Country:

Comments:

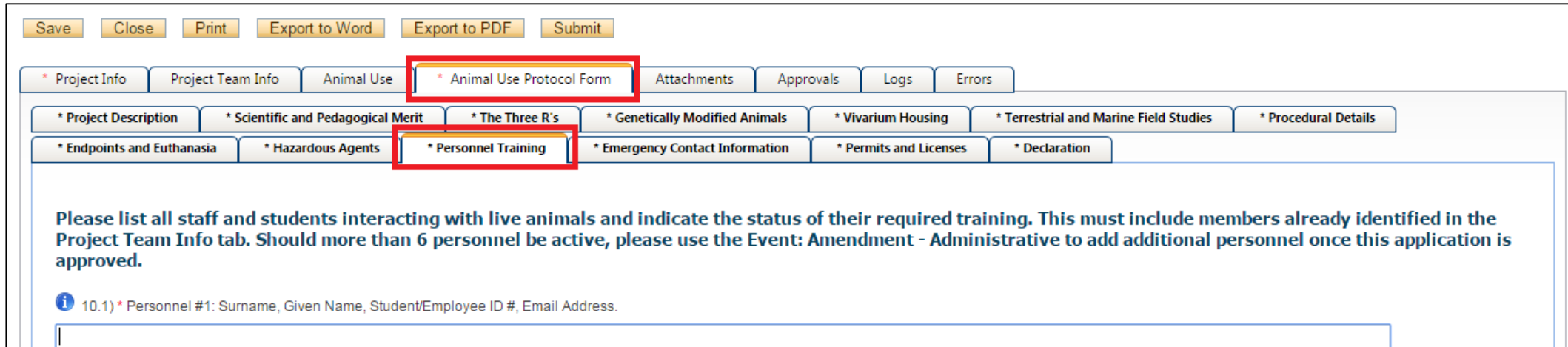
NOTE: If you change the PI for the application later on, you will need to copy and paste any Team Members added this way into the Comments box for the new PI.

Other Project Member Info:
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Last Name	First Name	Role In Project
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Adding a Project Team Member Cont'd

In the Animal Use Protocol Form Tab, please list all staff and students interacting with live animals on the Personnel Training sub-tab. **This must include members already identified in the Project Team Info tab.** *Should more than 6 personnel be active, please use the Event: Amendment - Administrative to add additional personnel once this application is approved.*



Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Animal Use *** Animal Use Protocol Form** Attachments Approvals Logs Errors

* Project Description * Scientific and Pedagogical Merit * The Three R's * Genetically Modified Animals * Vivarium Housing * Terrestrial and Marine Field Studies * Procedural Details

* Endpoints and Euthanasia * Hazardous Agents *** Personnel Training** * Emergency Contact Information * Permits and Licenses * Declaration

Please list all staff and students interacting with live animals and indicate the status of their required training. This must include members already identified in the Project Team Info tab. Should more than 6 personnel be active, please use the Event: Amendment - Administrative to add additional personnel once this application is approved.

i 10.1) * Personnel #1: Surname, Given Name, Student/Employee ID #, Email Address.

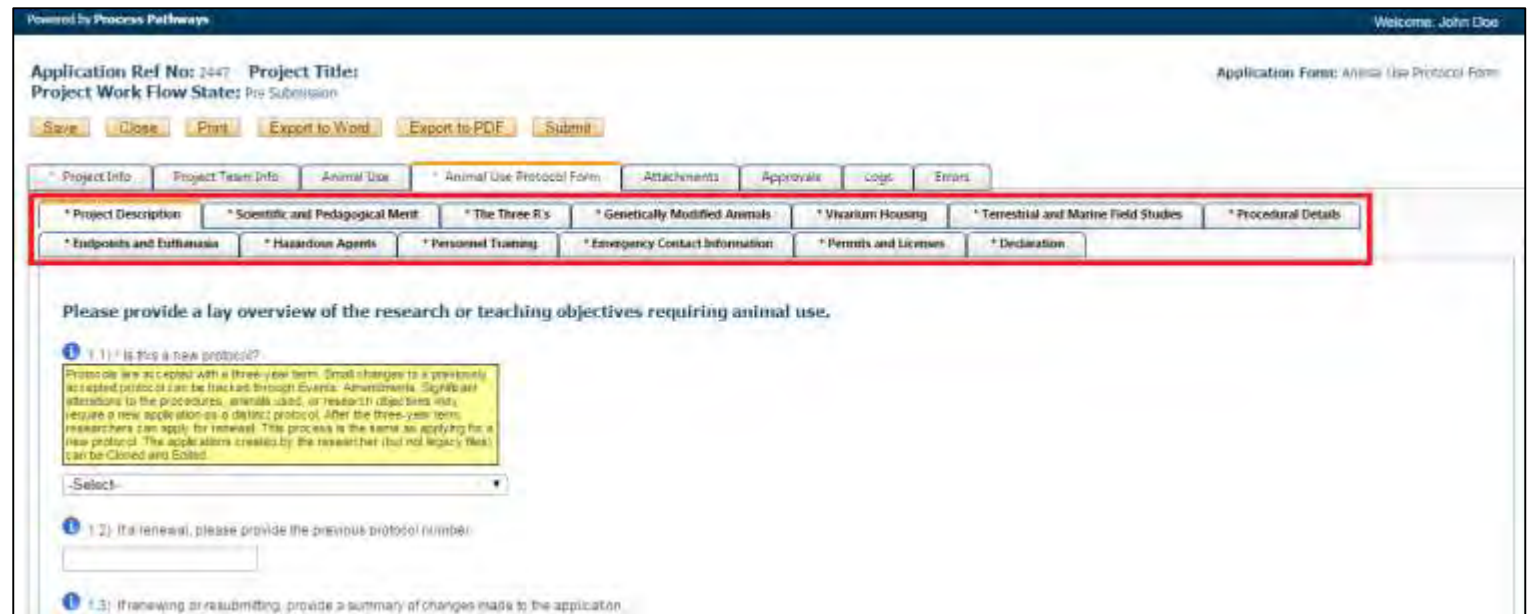
Please reference [Application Custom Question Tab](#) for more information about application sub-tabs.

Application Custom Question Tab

This tab includes all the questions that are directly related to your particular IACC application. There will be a number of sub-tabs that organize the application questions into different areas. If you are unsure how to complete a question, click the blue information button. This button contains additional information or directions about the question.

NOTE: Text responses that contain < > will prompt an unsupported character error and may cause data loss.

When you select a blue information button a yellow block will drop down providing additional information.



Powered by Process Pathways Welcome, John Doe

Application Ref No: 2447 Project Title: Application Form: Animal Use Protocol Form

Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Animal Use **Animal Use Protocol Form** Attachments Approvals Log Errors

* Project Description * Scientific and Pedagogical Merit * The Three R's * Genetically Modified Animals * Vivarium Housing * Terrestrial and Marine Field Studies * Procedural Details

* Endpoints and Euthanasia * Hazardous Agents * Personnel Training * Emergency Contact Information * Permits and Licenses * Declaration

Please provide a lay overview of the research or teaching objectives requiring animal use.

1.1) Is this a new protocol?
Protocols are accepted with a three-year term. Small changes to a previously accepted protocol can be tracked through Events. Amendments, Significant alterations to the procedures, animals used, or research objectives will require a new application as a distinct protocol. After the three-year term, researchers can apply for renewal. This process is the same as applying for a new protocol. The applications created by the researcher (but not legacy files) can be Closed and Edited.

1.2) If a renewal, please provide the previous protocol number:

1.3) If renewing or resubmitting, provide a summary of changes made to the application.

Animal Use Tab

This tab is used to request animals in conjunction with the research application.

Click **Add New** to create an entry for each species and strain of animal for the application. Each genetically-distinct line should have its own entry

Powered by Process Pathways Welcome: Memorial Researcher

Application Ref No: 8544 Application Form: Animal Use Pr

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Animal Use Protocol Form * Animal Use Attachments Approvals Logs Errors

Animal Use Info

Purpose of Animal Use: (PAU) *

Category of Invasiveness:(CI) *

Classification

Protocol Description:

Animal Use Summary:

Add New		Species	Strain	# Animals Requested	# Animals Approved	# Animals Used	PAU	CI
No records to display.								

The IACC does not collect information regarding Classification. This field can be ignored.

All applications are required to fill out the Protocol Description. The description should be a 1-3 sentence lay summary outlining research objectives, species, experimental methods and design.

Animal Use Tab Cont'd

After selecting **Add New**, fill in the appropriate information regarding the species or strain. For more information on filling out the various fields please reference the Animal Use Glossary at <http://rpresources.mun.ca>.



The screenshot shows the 'Animal Use General' form. It includes fields for Species (set to 'Unspecified'), Species Keywords (set to 'Fusiformis spirochaeta'), Sex, Race, Gender, Source, Research Contact, Transportation, Housing/Shipping Room, Experimental/Procedure Building Room, HWI, and ID. There are also 'Save' and 'Cancel' buttons at the top.

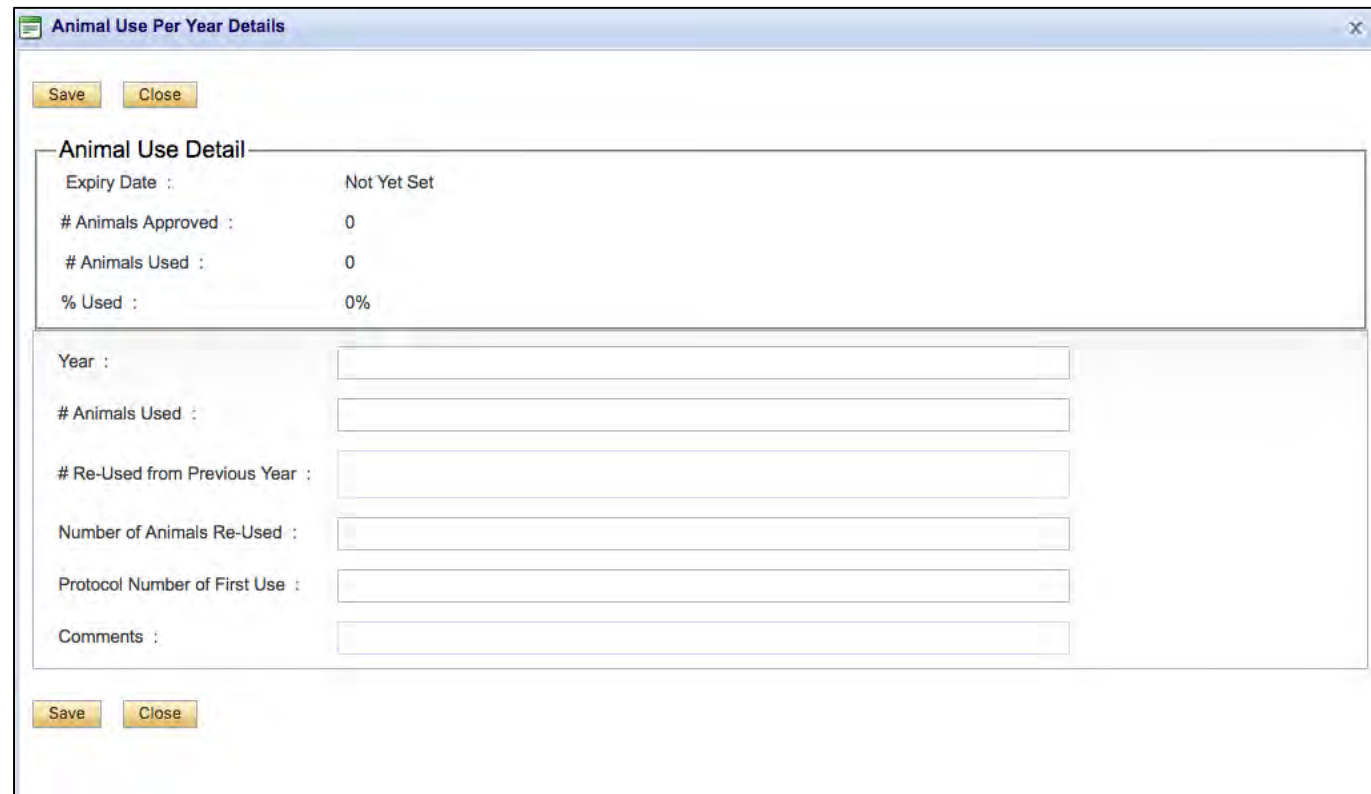
At the bottom of this page is the Animal Use per Year Table. To add new entries to this table select **Add New**. Researchers must request animals used per calendar year (January – December).



The screenshot shows the 'Animal Use Per Year Details' section. It includes a table with columns: Year, # Animals Used, # Re-Used from Previous Year, Number of Animals Re-Used, Protocol Number of First Use, and Comments. The table currently displays 'No records to display' and a 'Sort' button. There is an 'Add New' button highlighted with a red box. Above the table are fields for '# Animals Requested' and '# Animals Approved', and a 'Comments' text area. 'Save' and 'Close' buttons are at the bottom.

Animal Use Tab Cont'd

Fill in the necessary information for the Animal Use Per Year Details. For more information on filling out the various fields please reference the Animal Use Glossary at <http://rpresources.mun.ca>.



The screenshot shows a web form titled "Animal Use Per Year Details". At the top left, there are "Save" and "Close" buttons. Below them is a section titled "Animal Use Detail" which contains a table with the following data:

Expiry Date :	Not Yet Set
# Animals Approved :	0
# Animals Used :	0
% Used :	0%

Below the table are several input fields:

- Year :
- # Animals Used :
- # Re-Used from Previous Year :
- Number of Animals Re-Used :
- Protocol Number of First Use :
- Comments :

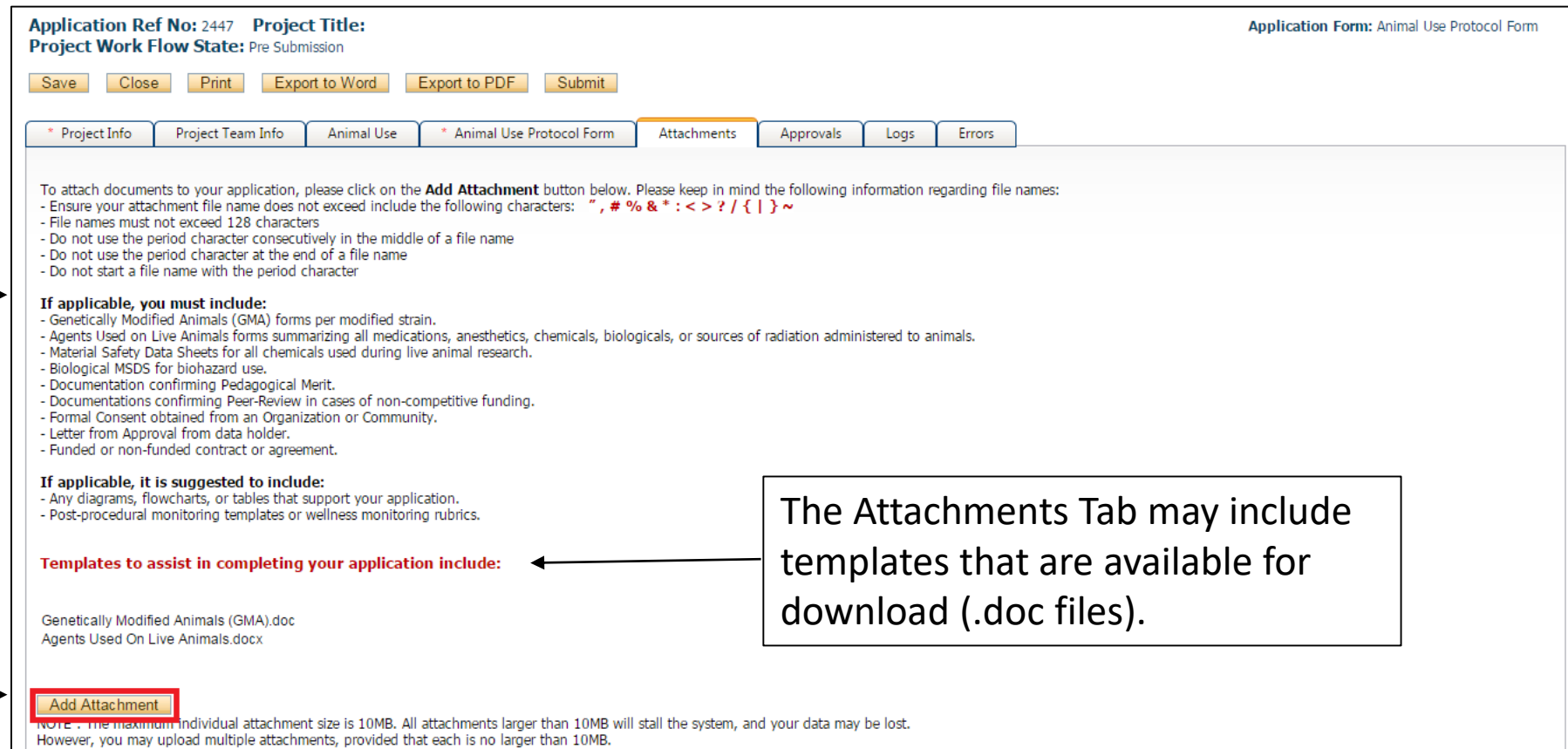
At the bottom left, there are "Save" and "Close" buttons.

Attachments Tab

The Attachments Tab is where users will upload any additional material that is required for the application.

At the top of the tab, there are application-specific instructions on what should be uploaded or where to find information about necessary documents to attach.

To upload an attachment, click the **Add Attachment** button.



The screenshot shows the 'Attachments' tab of an application form. At the top, it displays 'Application Ref No: 2447' and 'Project Title:'. Below this, the 'Project Work Flow State' is 'Pre Submission'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The 'Attachments' tab is selected, showing a list of tabs: 'Project Info', 'Project Team Info', 'Animal Use', 'Animal Use Protocol Form', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The main content area contains instructions for attaching documents, including a list of file name restrictions and a list of required documents. A red box highlights the 'Add Attachment' button at the bottom. Below the button, a note states: 'NOTE: The maximum individual attachment size is 10MB. All attachments larger than 10MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 10MB.'

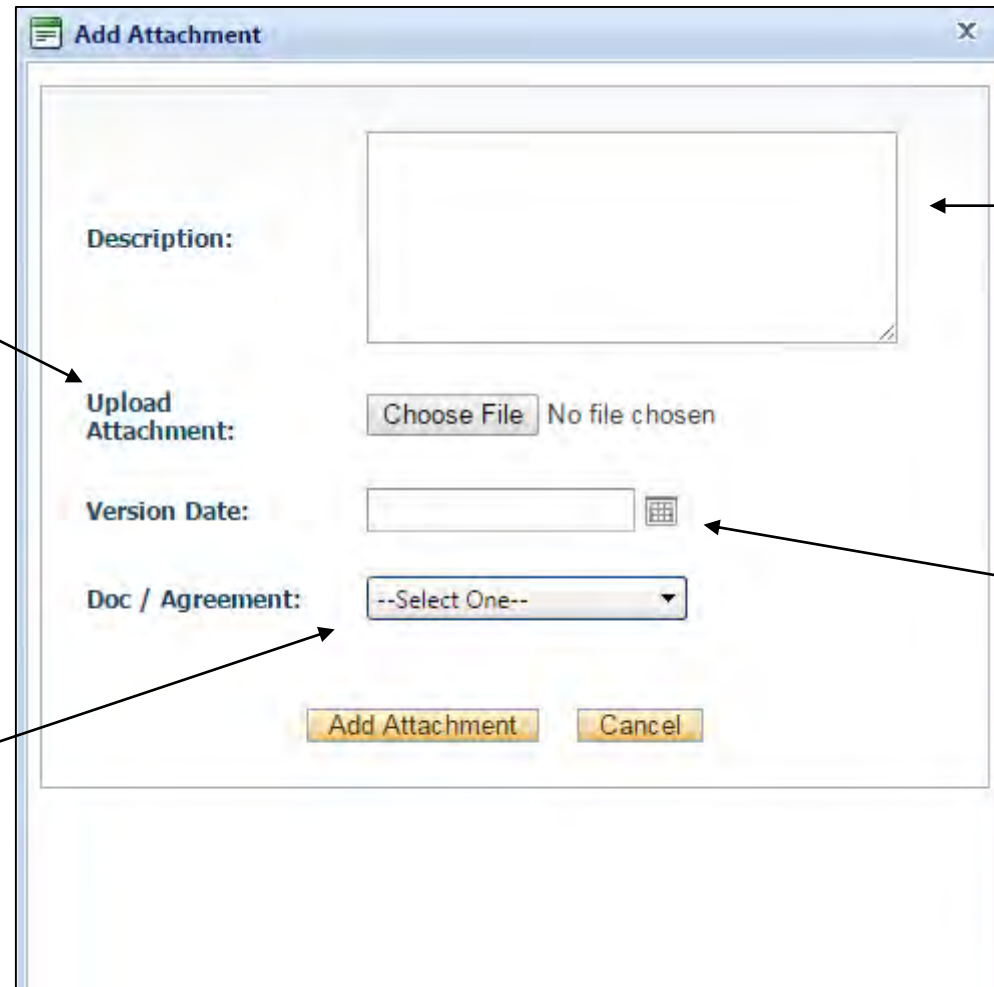
The Attachments Tab may include templates that are available for download (.doc files).

Attachments Tab Cont'd

When you click **Add Attachment**, the Attachment window will appear.

In order to select a file to upload, click **Choose File**. Please reference [File Name Guidelines for Attachments](#) for further instructions.

Select the type of Doc/Agreement from the provided list. Please use appropriate type indicated by the application.



The screenshot shows a window titled "Add Attachment" with the following fields and controls:

- Description:** A large text area for entering a description.
- Upload Attachment:** A button labeled "Choose File" next to the text "No file chosen".
- Version Date:** A date input field with a calendar icon to its right.
- Doc / Agreement:** A dropdown menu currently showing "--Select One--".
- At the bottom, there are two buttons: "Add Attachment" and "Cancel".

If you wish or have been directed to fill in a description on the attachment, do so here.

The date when the document was finalized. If you have multiple versions of the same document prior to submission, it is recommended you delete the outdated attachments.

File Name Guidelines for Attachments

When uploading an attachment to the Memorial Researcher Portal, the file name **must adhere to the following guidelines**:

- Ensure your attachment filename does not include these characters: " # % & * : < > ? / { | } ~ [] +
- Filenames must not exceed 128 characters.
- Do not use the period character consecutively in the middle of a file name.
- Do not use the period character at the end of a file name.
- Do not start a file name with the period character.

Please note: The maximum file size is 10 MB. While users can attach as many files as necessary, no single file can exceed 10 MB.

Please reference the FAQ section on the Memorial Research Tools and Resources Website to find suggestions on how to deal with a file that is bigger than 10 MB.

Approvals Tab

The Approvals Tab demonstrates the path an application will travel once it is submitted (indicated by the checked box next to the particular body). Most certification applications will be directly submitted to the specific certification office and will not require other signatures. For the Animal Use Protocol Form application, “Office of Research Ethics” refers to the IACC and will automatically route to their office.

Powered by **Process Pathways** Welcome: John Doe

Application Ref No: 2421 **Project Title:** **Application Form:** Animal Use Protocol Form
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

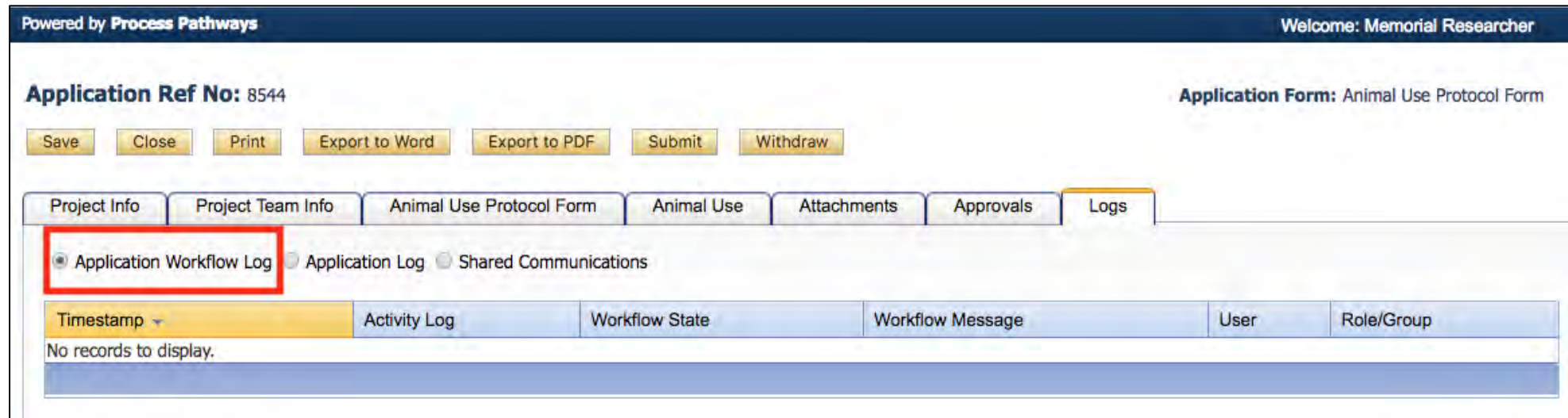
[* Project Info](#) [Project Team Info](#) [Animal Use](#) [* Animal Use Protocol Form](#) [Attachments](#) [Approvals](#) [Logs](#) [Errors](#)

Approvals
This application is pre-programmed to route to the following signing authority levels

Role	Active	Exceptions
Division Signing Authority	<input type="checkbox"/>	
Department Signing Authority	<input type="checkbox"/>	
Faculty Signing Authority	<input type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

Logs Tab

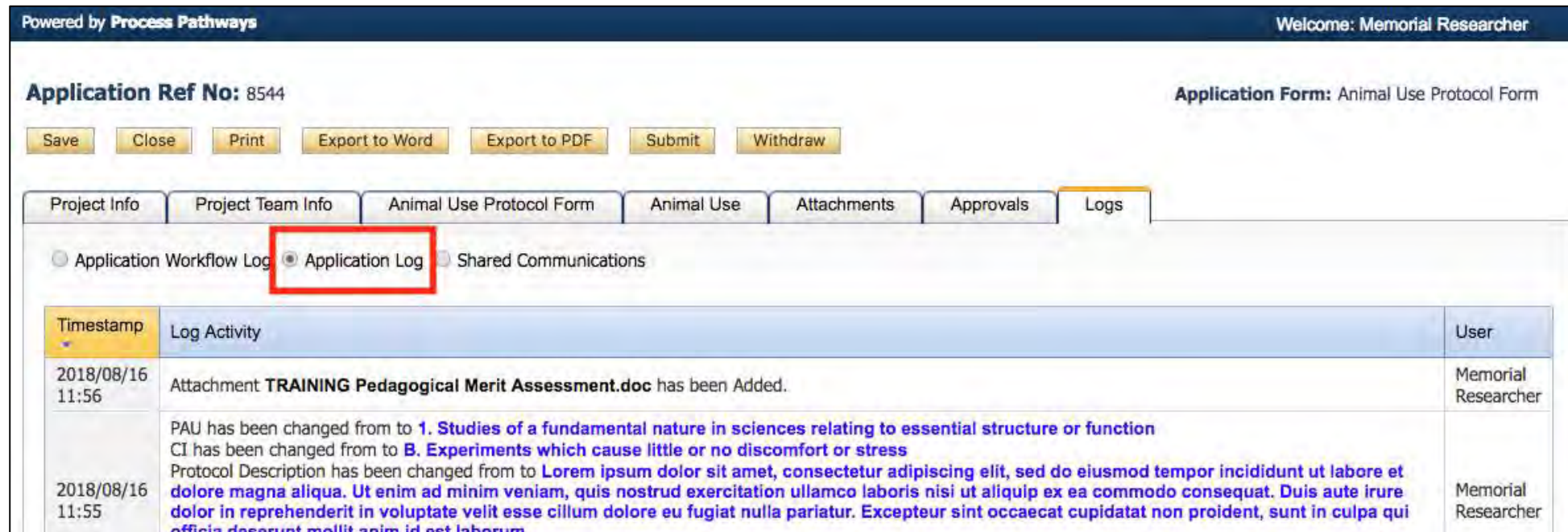
The Logs Tab allows the PI and Project Team Members to view all actions on a file. Under the Application Workflow Log, you can track the history of the application. It tracks and time stamps approvals and messages between the PI and the Animal Care Office.



The screenshot displays the Memorial Researcher Tools & Resources interface. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". The main content area shows "Application Ref No: 8544" and "Application Form: Animal Use Protocol Form". Below this are several buttons: Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. A navigation bar contains tabs for Project Info, Project Team Info, Animal Use Protocol Form, Animal Use, Attachments, Approvals, and Logs. The Logs tab is selected, and within it, the "Application Workflow Log" radio button is selected and highlighted with a red box. Below the radio buttons is a table with columns: Timestamp, Activity Log, Workflow State, Workflow Message, User, and Role/Group. The table currently displays "No records to display."

Logs Tab Cont'd

Under the Application Log, all changes made to the application are tracked by the user. It is the responsibility of the PI to review the project log to ensure they are aware of all changes made by Project Team Members prior to submission.



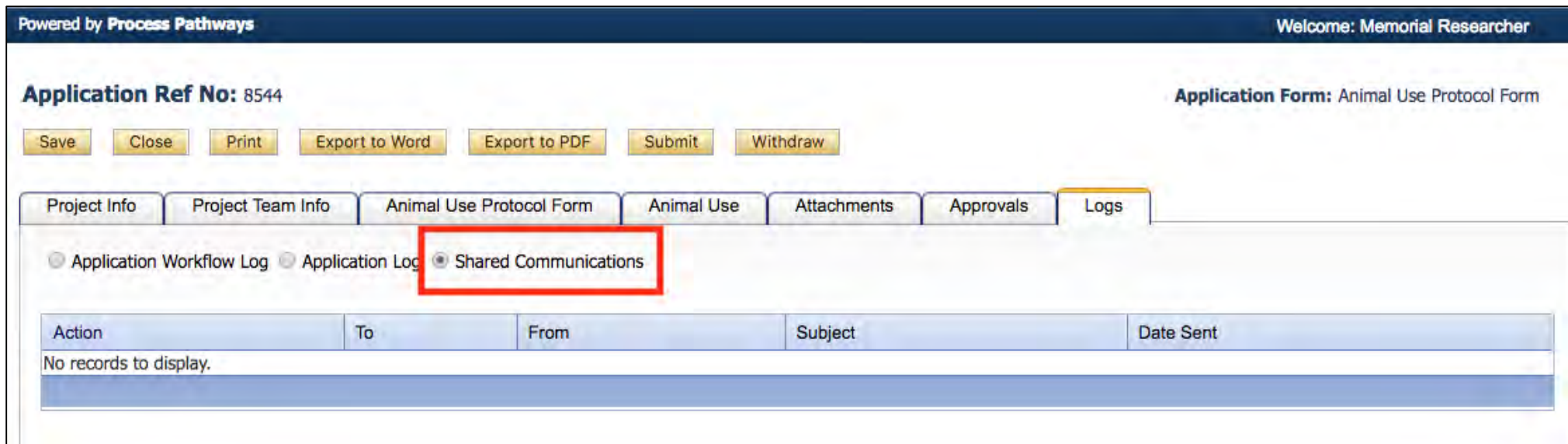
The screenshot displays the Memorial Researcher Tools & Resources interface. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". The main content area shows "Application Ref No: 8544" and "Application Form: Animal Use Protocol Form". Below this are buttons for "Save", "Close", "Print", "Export to Word", "Export to PDF", "Submit", and "Withdraw". A navigation bar contains tabs for "Project Info", "Project Team Info", "Animal Use Protocol Form", "Animal Use", "Attachments", "Approvals", and "Logs". The "Logs" tab is selected, and within it, the "Application Log" radio button is selected and highlighted with a red box. Below the navigation bar is a table with the following data:

Timestamp	Log Activity	User
2018/08/16 11:56	Attachment TRAINING Pedagogical Merit Assessment.doc has been Added.	Memorial Researcher
2018/08/16 11:55	PAU has been changed from to 1. Studies of a fundamental nature in sciences relating to essential structure or function CI has been changed from to B. Experiments which cause little or no discomfort or stress Protocol Description has been changed from to Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.	Memorial Researcher

Logs Tab Cont'd

Under Shared Communications, ethics offices can share previously sent emails with the Project Team. Emails here may be viewed or printed.

NOTE: Various ethics offices may use this functionality differently. Please contact the particular ethics office if you have questions about how that office uses this functionality.



Powered by Process Pathways Welcome: Memorial Researcher

Application Ref No: 8544 Application Form: Animal Use Protocol Form

Save Close Print Export to Word Export to PDF Submit Withdraw

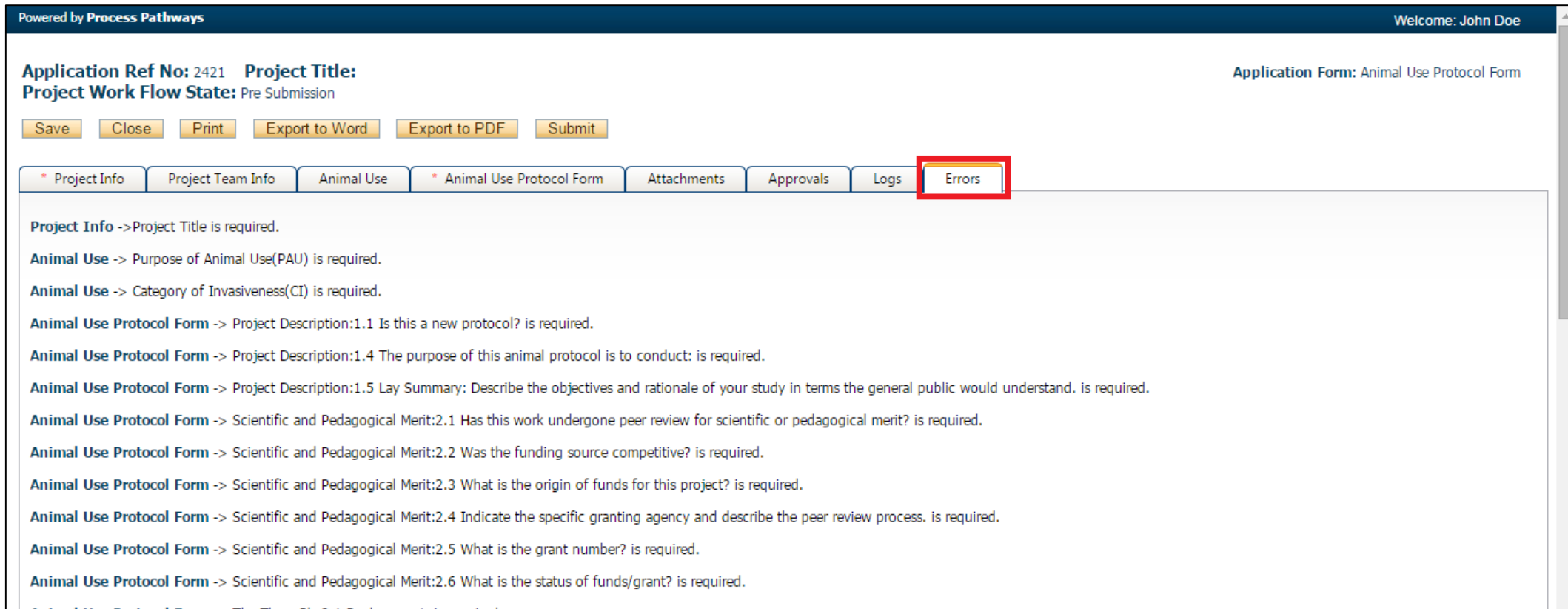
Project Info Project Team Info Animal Use Protocol Form Animal Use Attachments Approvals **Logs**

Application Workflow Log Application Log Shared Communications

Action	To	From	Subject	Date Sent
No records to display.				

Errors Tab

The Errors Tab lists any required questions that have not been answered. When all required questions are answered the Errors Tab will disappear. You cannot submit an application if the Errors Tab appears on your application.



Powered by Process Pathways Welcome: John Doe

Application Ref No: 2421 Project Title: Application Form: Animal Use Protocol Form
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Animal Use * Animal Use Protocol Form Attachments Approvals Logs **Errors**

Project Info -> Project Title is required.
Animal Use -> Purpose of Animal Use(PAU) is required.
Animal Use -> Category of Invasiveness(CI) is required.
Animal Use Protocol Form -> Project Description:1.1 Is this a new protocol? is required.
Animal Use Protocol Form -> Project Description:1.4 The purpose of this animal protocol is to conduct: is required.
Animal Use Protocol Form -> Project Description:1.5 Lay Summary: Describe the objectives and rationale of your study in terms the general public would understand. is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.1 Has this work undergone peer review for scientific or pedagogical merit? is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.2 Was the funding source competitive? is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.3 What is the origin of funds for this project? is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.4 Indicate the specific granting agency and describe the peer review process. is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.5 What is the grant number? is required.
Animal Use Protocol Form -> Scientific and Pedagogical Merit:2.6 What is the status of funds/grant? is required.

Editing a Saved Application

Once you have started and saved an application, it will appear in the **Applications: Drafts** under the appropriate role block. When you enter the quick link you will see a page of all applications that are created but not submitted. There are various options to select for an application as shown below.



Powered by **Process Pathways** | Product Info

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Memorial
Researcher Portal

BACK TO HOME | Search | File No. [] [] [] | APPLY NEW | News | Useful Links |

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	File No.	Project Title	Principal Investigator	Application Type	Status Snapshot
View Edit Clone Delete Latest Workflow	Ref No : 8544	Sample Application	Dr. Memorial Researcher (Faculty of Science\Department of Biology)	Animal Use Protocol Form (Certification\Animal Care)	Project Status: Pending Workflow Status: Pre-Submission Last Saved: 2018/08/16

Application Options

The options for an application include:

Edit: To enter the application with the ability to edit and save content.

View: To view the application without the ability to edit and save content.

Clone: By selecting this button you can clone your application. This will allow you to start a new application with the same information from a previous application.

Please note: the Animal Use Tab and events associated with the application will not be cloned. This button should not be used when a request for revisions has been made by the IACC. All edits for revisions should be made to the submitted application.

Delete: To delete the application from the Researcher Portal.

Latest Workflow: To open the application directly at the Logs Tab to view the Workflow Log.



Locked File

A file may appear as "locked" if another team member is working on it or if a team member has not closed the file properly after working on it.

If it appears that you have been locked out of a file by a Project Team Member, you should directly contact that team member prior to clicking **Unlock**. *If you unlock the file while a team member is working on it, all changes made by that team member will be deleted.* If the team member is not working in the file, the PI can click **Unlock**. You may also contact the Researcher Portal help desk for assistance.

If **you** are the researcher who has locked a file, you can unlock it by re-opening the file to edit it and clicking Close to properly close the file. ***It is important to Save and Close a file in the Researcher Portal when you have completed your work to avoid locking other team members out of the file.***



Powered by Process Pathways

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
View Unlock	Ref No : 2421	Test Application 123	Dr. John Doe (Research Units)	Animal Use Protocol Form (Certification/Animal Care)	Project Status: Pending Workflow Status: Pre Submission Last Saved: 2016/03/02	

Locked By Test_pi2

Withdrawing an Application

If the application under Applications: Drafts or Applications: Requiring Attention, you may withdraw the application from consideration.

To withdraw an application:

- Click on the applicable link (Applications: Drafts or Applications: Requiring Attention)
- Edit the specific application
- Click Withdraw

You will need to add a comment in the Work Flow Action window to process the withdrawal request.

Once you withdraw an application, you can locate it under Applications: Withdrawn on the Researcher Portal homepage.

Submitting an Application

When you have completed the application and are prepared to submit it, click **Save** in the Application Action Buttons at the top of the page. Once you have clicked save, click the **Submit** button.



A workflow action block will appear. Here, make any necessary comments to the Animal Care Office about your application. Once you submit the application you will no longer be able to edit the content. Click **Submit**.



Please note you cannot submit the application without entering a comment in the workflow action block.

Reviewing a Submitted Application

When an application is under review, it will appear under the role block quick link called “Applications: Under Review”. Click on the quick link to view the status of your application. The column, **Status Snapshot** will show the project’s status and where the application is in the workflow.



Powered by Process Pathways | Product Info

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Researcher Portal

BACK TO HOME | Search | File No | [Search Icon]

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
View Clone Latest Workflow	20190433	Sample Application	Dr. Memorial Researcher (Faculty of Science\Department of Biology)	Animal Care	Project Status: Pending Workflow Status: ORS Review

Applications Requiring Revisions

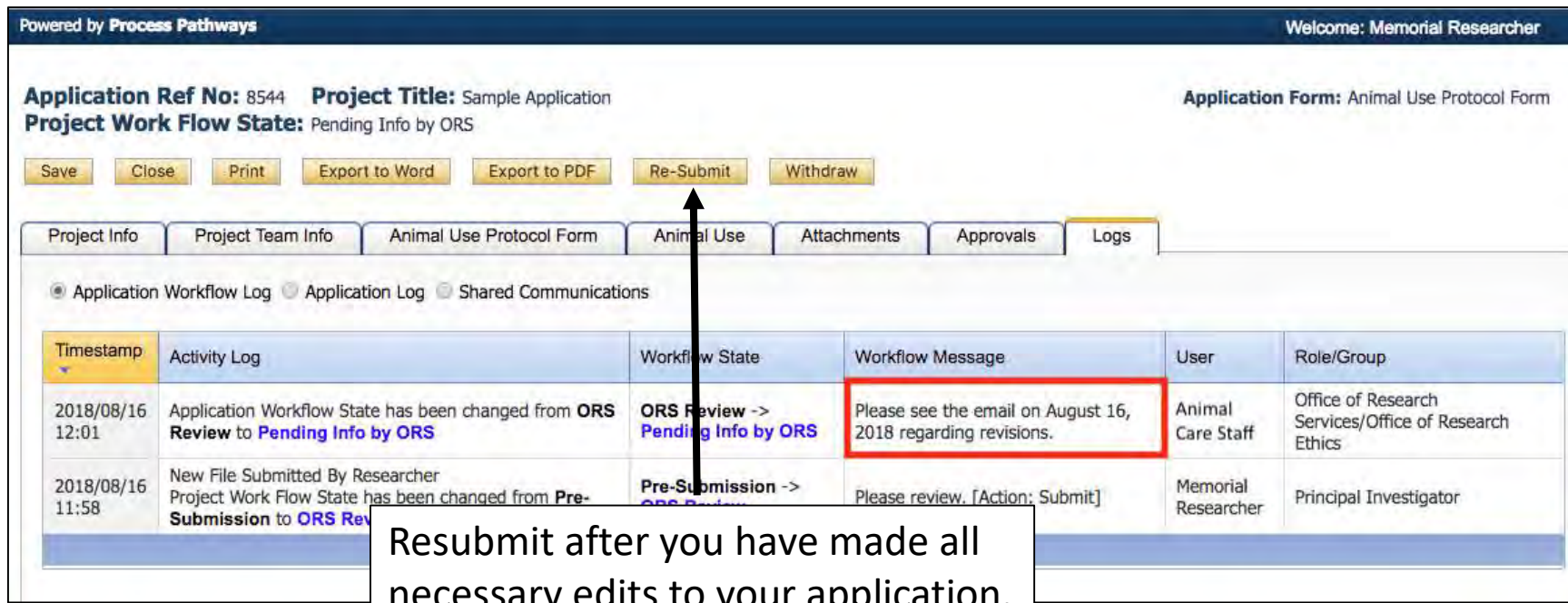
When an application has been returned for revisions, the role block quick link “Applications: Requiring Attention” will be boldfaced and red. Click the quick link and then select **Edit** to enter the application.



Applications Requiring Revisions Cont'd

To see the workflow message from the Animal Care Office, go to the Logs Tab. The Workflow message in the table will provide information regarding the necessary changes. Once you have made the necessary edits, click **Re-Submit** in the Application Action Buttons at the top of the application. In the the pop-up Work Flow Action window, enter a comment and click **Submit**.

If you wish to withdraw this application from further consideration, click **Withdraw**. This withdraws the application and moves it to Applications: Withdrawn.



The screenshot shows the Memorial Researcher application interface. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". Below this, the application details are displayed: "Application Ref No: 8544", "Project Title: Sample Application", and "Application Form: Animal Use Protocol Form". The "Project Work Flow State" is "Pending Info by ORS".

There are several action buttons: Save, Close, Print, Export to Word, Export to PDF, Re-Submit, and Withdraw. The "Re-Submit" button is highlighted with a red box and an arrow pointing to it from a text box below.

Below the buttons are tabs for "Project Info", "Project Team Info", "Animal Use Protocol Form", "Animal Use", "Attachments", "Approvals", and "Logs". The "Logs" tab is selected, showing a table of workflow logs.

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
2018/08/16 12:01	Application Workflow State has been changed from ORS Review to Pending Info by ORS	ORS Review -> Pending Info by ORS	Please see the email on August 16, 2018 regarding revisions.	Animal Care Staff	Office of Research Services/Office of Research Ethics
2018/08/16 11:58	New File Submitted By Researcher Project Work Flow State has been changed from Pre-Submission to ORS Review	Pre-Submission -> ORS Review	Please review. [Action: Submit]	Memorial Researcher	Principal Investigator

Resubmit after you have made all necessary edits to your application.

Contact Us!



If you have any issues or questions about the Memorial Researcher Portal please submit a Help Desk Ticket at <https://rpresources.mun.ca/help-2/help/>

*Special thanks to Queen's University for providing support and material for this training manual.