



# Reviewer Manual

Reviewing Applications and Event Forms

## **\*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 <https://rpresources.mun.ca/wp-content/uploads/2016/10/17.10.2016-Navigation-Manual.pdf>

# Table of Contents

If you wish, you may click one of the topics in the list to quick find information.

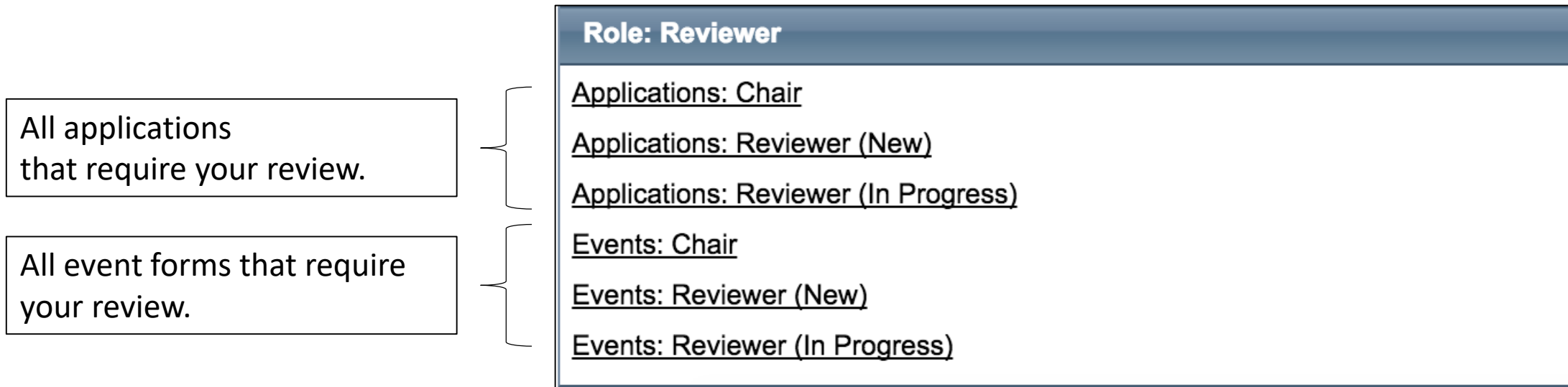
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# Receiving a Review Assignment

When you are assigned as a reviewer to a file, you will receive an email notification that there is a new application or event form for you to review on the Memorial Researcher Portal. You will also see that you have a new review assignment on your Researcher Portal Home Page.

To view the application or event form, follow the Login instructions in the Basic User Manual to login to the Memorial Researcher Portal. The Basic User Manual can be found on <https://rpresources.mun.ca/wp-content/uploads/2016/10/17.10.2016-Navigation-Manual.pdf>

When you log into the Memorial Researcher Portal, you will see the Home Page. The **Reviewer Role Block** on the Home Page provides links that will direct you to applications or event forms where you have been assigned as a reviewer. You can review and submit feedback for applications and event forms by selecting one of the links.



**Applications: Chair or Events: Chair:** These links will contain applications or event forms where you are assigned as the Chair for the review. The Chair can save comments throughout the review that are viewable to all reviewers assigned to the same file.

Once the review is completed by all reviewers, the Chair will make an approval decision. When the approval decision is made, the file will disappear from the menu and is no longer accessible. **It is important as the Chair that you ensure all reviewers are finished with their reviews prior to making a decision.**

**Applications: Reviewer or Events: Reviewer:** These links will contain applications or event forms where you are assigned to complete a review. You can save comments throughout the review that are viewable to all reviewers assigned to the file.

When you initially receive a file for review, it will appear under the link suffixed with “New”. Once you save comments it will then move to the link suffixed with “In Progress”. **Once the Chair makes an approval decision on a file, it will disappear from your links.**

# Accessing a Review Assignment

All of your review assignments will initially appear as a new application or new event form in the **Reviewer Role Block**. Click on the appropriate link to access all new review assignments requiring your review.



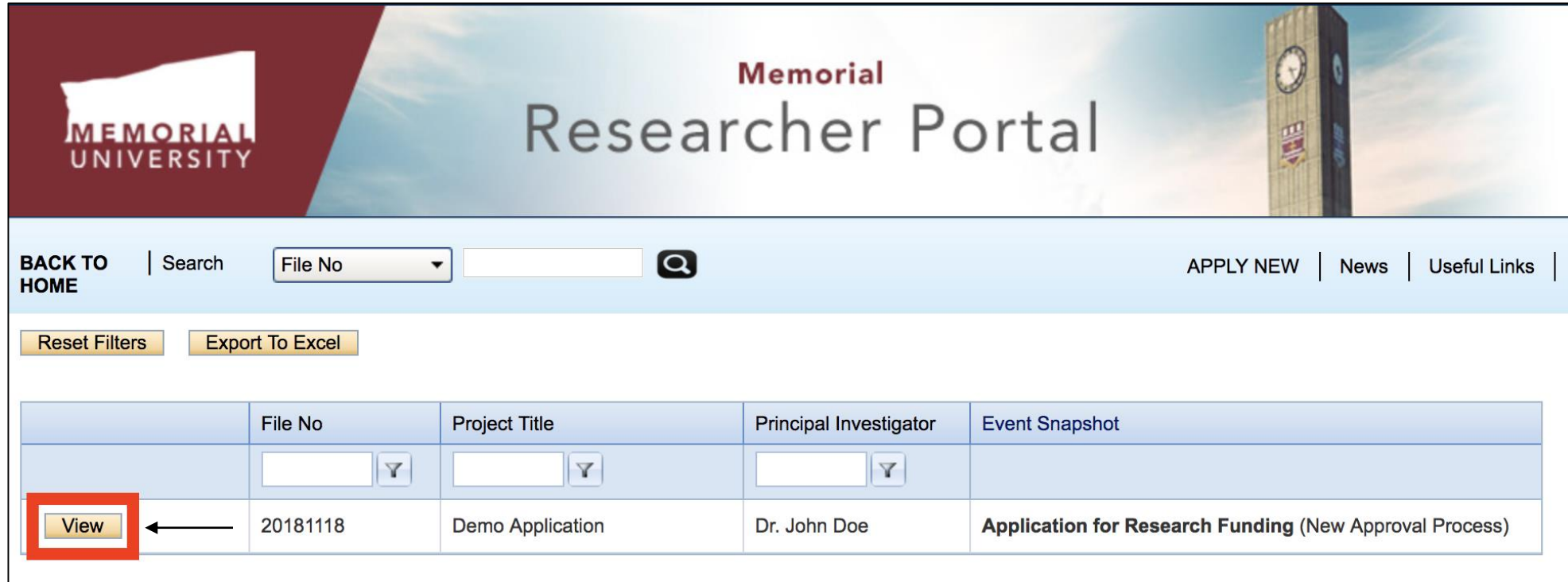
**Role: Reviewer**

- Applications: Chair
- Applications: Reviewer (New)\***
- Applications: Reviewer (In Progress)
- Events: Chair
- Events: Reviewer (New)
- Events: Reviewer (In Progress)



# Opening a Review Assignment

To select the appropriate application, click the **View** Button.



The screenshot displays the Memorial Researcher Portal interface. At the top left is the Memorial University logo. The main header reads "Memorial Researcher Portal". Below the header is a navigation bar with "BACK TO HOME", a search bar, a "File No" dropdown menu, and a search icon. To the right of the search bar are links for "APPLY NEW", "News", and "Useful Links". Below the navigation bar are two buttons: "Reset Filters" and "Export To Excel". The main content area features a table with the following columns: "File No", "Project Title", "Principal Investigator", and "Event Snapshot". The first row of data shows a "View" button (highlighted with a red box and an arrow), the file number "20181118", the project title "Demo Application", the principal investigator "Dr. John Doe", and the event snapshot "Application for Research Funding (New Approval Process)".

|                      | File No              | Project Title        | Principal Investigator | Event Snapshot   |
|----------------------|----------------------|----------------------|------------------------|--|
| <a href="#">View</a> | <input type="text"/> | <input type="text"/> | <input type="text"/>   |  |
| ←                    | 20181118             | Demo Application     | Dr. John Doe           | <b>Application for Research Funding (New Approval Process)</b> |

# Application Action Buttons

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

- **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.
- **Review:** Enter comments and complete your review of the application.



The screenshot displays a web application interface. At the top, it shows metadata: **File No:** 20181118, **Project Title:** Demo Application, **Project Work Flow State:** ORS Review, and **Application Form:** Application for Research Funding. Below this, a row of five buttons is highlighted with a red border: **Close**, **Print**, **Export to Word**, **Export to PDF**, and **Review**. A red text instruction below the buttons reads: "View mode. Click Review to enter, save and submit comments." Below the buttons is a horizontal navigation bar with tabs: **Project Info**, **Project Team Info**, **Project Sponsor Info**, **Application for Research Funding**, **Attachments**, **Approvals**, **Logs**, and **Committee Reviews**. The **Project Info** tab is active. Below the navigation bar, a form field is visible with the label **Title \*** and the value "Demo Application".

There are two methods available to you as a reviewer to view an application:

1. You can review the application in the Researcher Portal by navigating through the tabs. Please see slide 15, [Adding and Submitting Reviewer Comments](#), for more information on this method.
2. You can also review the application by using the **Export to Word** or **Export to PDF** Application Action buttons. A further explanation of this method of review is described in slide 16, [Adding and Submitting Reviewer Comments](#).

# Reviewing in the Researcher Portal

You can review the application by navigating through the various tabs highlighted below. The tabs include Project Info, Project Team Info, Project Sponsor Info, Application Custom Questions, Attachments, Approvals and Logs. **The information in the Committee Reviews tab is only visible to reviewers and awards office administrators.**

**File No:** 20181118   **Project Title:** Demo Application   **Project Work Flow State:** ORS Review   **Application Form:** Application for Research Funding

[Close](#)   [Print](#)   [Export to Word](#)   [Export to PDF](#)   [Review](#)

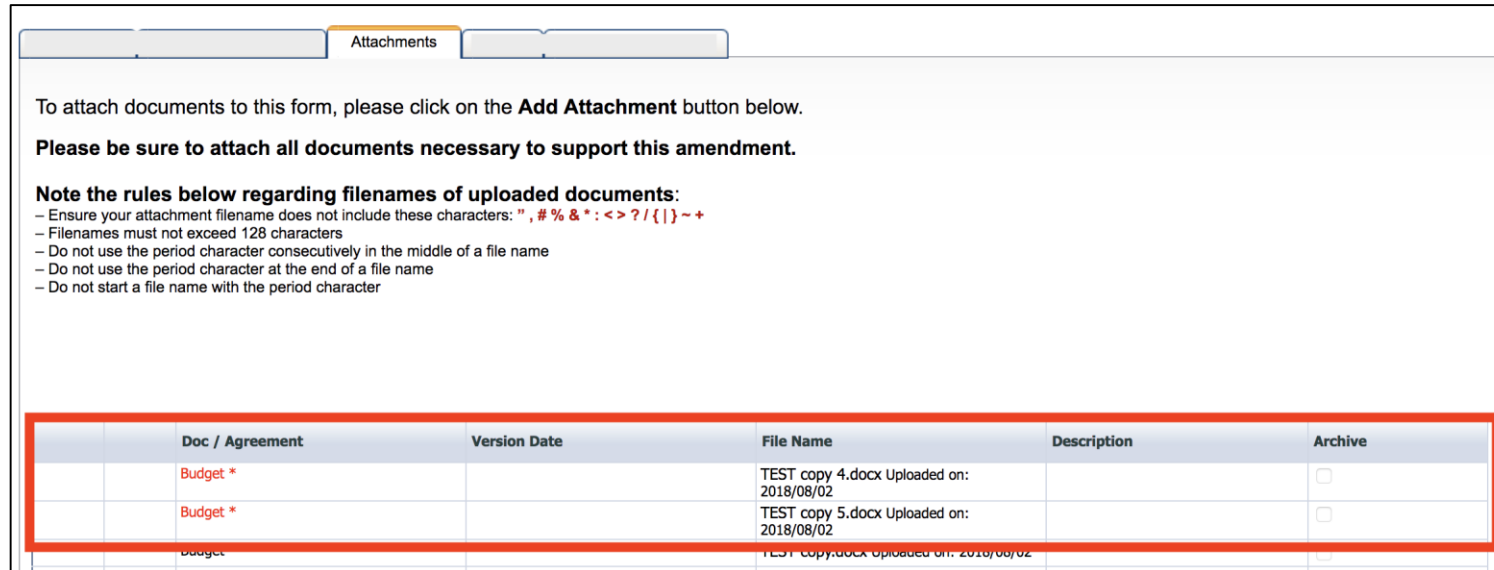
*View mode. Click Review to enter, save and submit comments.*

|                     |                   |                      |                                  |             |           |      |                   |
|---------------------|-------------------|----------------------|----------------------------------|-------------|-----------|------|-------------------|
| <b>Project Info</b> | Project Team Info | Project Sponsor Info | Application for Research Funding | Attachments | Approvals | Logs | Committee Reviews |
|---------------------|-------------------|----------------------|----------------------------------|-------------|-----------|------|-------------------|

**Title \*:** Demo Application

- **Project Info:** Includes basic information about the application (Project Title & Dates).
- **Project Team Tab:** Includes information about the project team (Project Team Members and their roles in the project).
- **Project Sponsor Info Tab:** Indicates the Agency/Sponsor and Program related to the application.
- **Application Custom Questions Tab:** Is named after the application you are reviewing. It contains questions that are specific to the type of application. **There are various sub-tabs beneath this tab.** Be careful while navigating the sub-tabs so you do not miss any information.

- **Attachments Tab:** Allows you to view attachments added to the application by the Researcher, Research Team, or office staff. *If the awards office has highlighted specific files for your attention, they will appear at the top of the attachments list and will be in red text.*



To attach documents to this form, please click on the **Add Attachment** button below.

**Please be sure to attach all documents necessary to support this amendment.**

**Note the rules below regarding filenames of uploaded documents:**

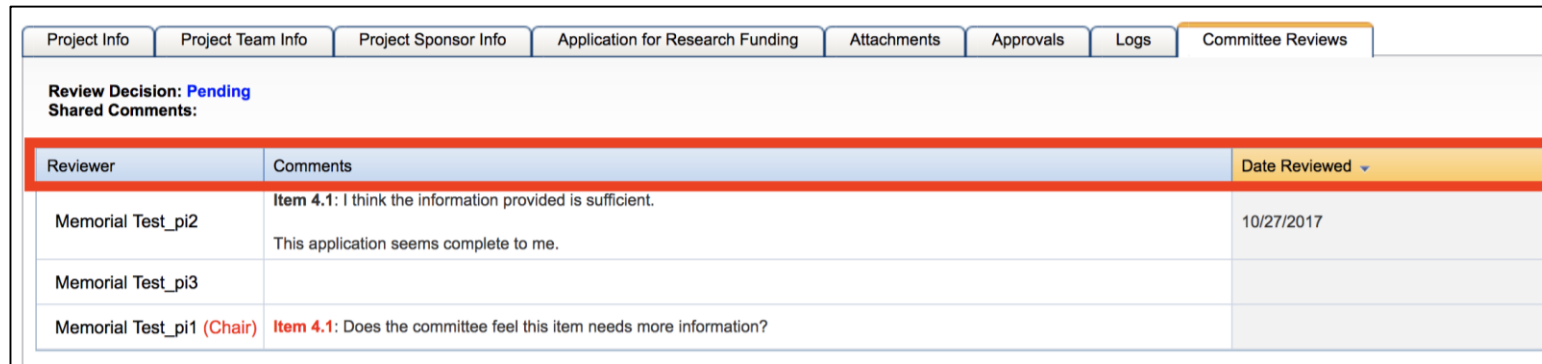
- Ensure your attachment filename does not include these characters: " , # % & \* : < > ? / { } ~ - +
- Filenames must not exceed 128 characters
- Do not use the period character consecutively in the middle of a file name
- Do not use the period character at the end of a file name
- Do not start a file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

|  | Doc / Agreement | Version Date | File Name                                   | Description | Archive                  |
|--|-----------------|--------------|---|-------------|--------------------------|
|  | Budget *        |              | TEST copy 4.docx Uploaded on:<br>2018/08/02 |             | <input type="checkbox"/> |
|  | Budget *        |              | TEST copy 5.docx Uploaded on:<br>2018/08/02 |             | <input type="checkbox"/> |
|  | Budget          |              | TEST copy.docx Uploaded on: 2018/08/02      |             | <input type="checkbox"/> |

- **Approvals Tab:** Illustrates the electronic workflow of the application.
- **Log Tab:** Allows you to view the history of the application. This includes the workflow and the edit history.

To see all the reviewer's comments, please proceed to the **Committee Reviews Tab** in the Memorial Researcher Portal. The Reviewer Table includes the following information:

- **Reviewer:** The various members of the review committee who are assigned to this file. The Chair will be highlighted in red as seen below.
- **Comments:** The individual comments made by each reviewer.
- **Date Reviewed:** The date that the reviewer has completed their review and submitted their final comments.

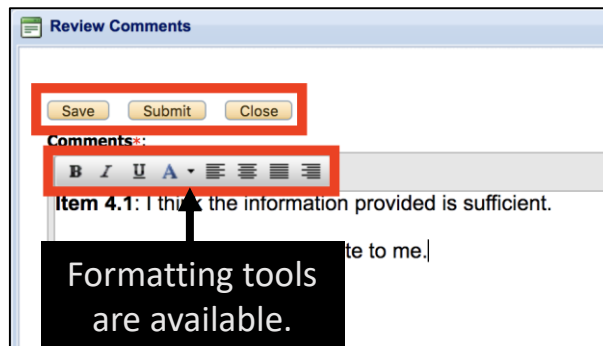
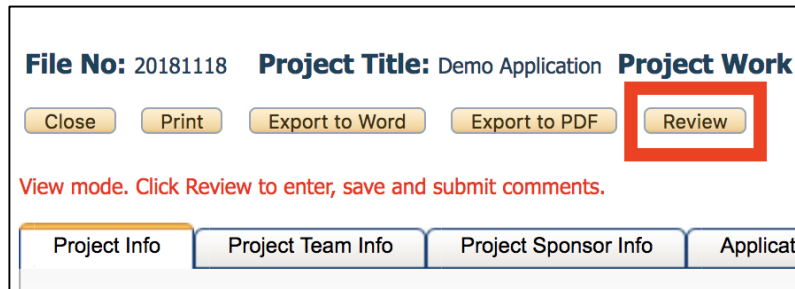


| Reviewer                  | Comments  | Date Reviewed |
|---------------------------|---|---------------|
| Memorial Test_pi2         | Item 4.1: I think the information provided is sufficient.<br>This application seems complete to me. | 10/27/2017    |
| Memorial Test_pi3         |   |               |
| Memorial Test_pi1 (Chair) | Item 4.1: Does the committee feel this item needs more information?                                 |               |

# Adding and Submitting Reviewer Comments

There are two ways to record reviewer comments:

- 1) You may open a blank Word document or Notepad on your screen while you review the application online and record any comments in Word or Notepad. As you enter your comments, be sure to prefix them with the question number. This allows other reviewers to easily follow your comments. Once you have compiled your comments in Word or Notepad, you can then copy and paste them *as plain text* into the **Comments Window** which appears when you click the **Review** button as seen in the screenshots below.



Once you have entered your review comments in the “Comments” window, you have three options.

- i. To save your comments and make additional edits at another time, or if you are waiting for a response from another reviewer, click the **Save** button.
- ii. Once you have completed your review, click the **Submit** button. The application will move to “Application Requiring your Review as a Reviewer – In Progress”, you will continue to have access to the application until the Chair submits his/her decision.
- iii. Close the Comments window without saving your comments, by clicking the **Close** button.



# Adding and Submitting Reviewer Comments Cont'd

2. You can also review an application by exporting it to Word. Click the **Export to Word** action button as seen in the screenshot below. **Please note that when exporting to Word, only the application questions and answers are exported. Any supporting documents found on the “Attachments” tab need to be downloaded from that tab individually.**



**File No:** 20181118 **Project Title:** Demo Application **Project Work Flow State:** ORS Review **Application Form:** Application for Research Funding

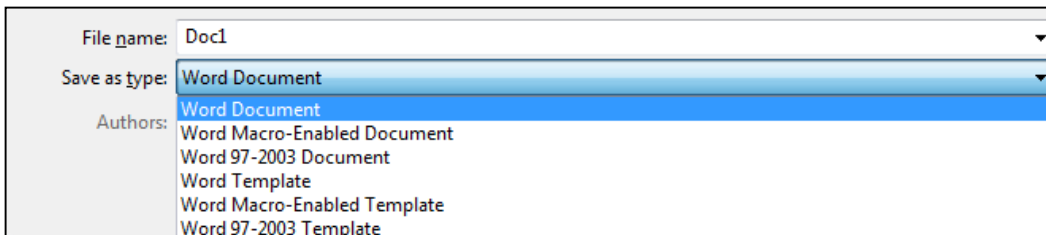
Close Print **Export to Word** Export to PDF Review

View mode. Click Review to enter, save and submit comments.

Project Info Project Team Info Project Sponsor Info Application for Research Funding Attachments Approvals Logs Committee Reviews

**Title \*:** Demo Application

Ensure that you select “Word Document” in the drop down menu for “Save as type”.



File name: Doc1

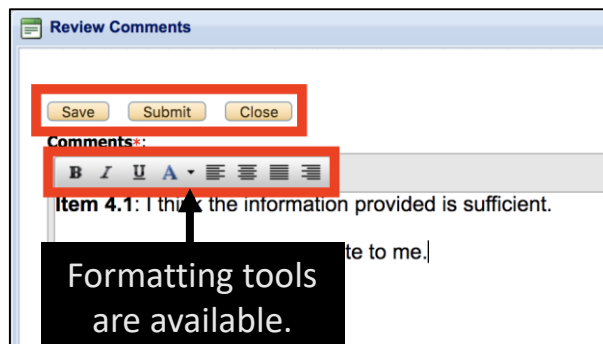
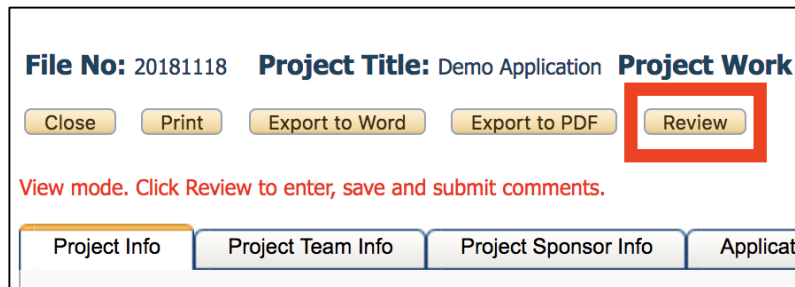
Save as type: Word Document

Authors: Word Document  
Word Macro-Enabled Document  
Word 97-2003 Document  
Word Template  
Word Macro-Enabled Template  
Word 97-2003 Template

# Adding and Submitting Reviewer Comments Cont'd

You can then choose to print the application and review it. As you review it, you can compile your comments in a separate Word document. We recommend that you prefix your comments with the question number that you are commenting upon. This allows other reviewers to easily follow your comments.

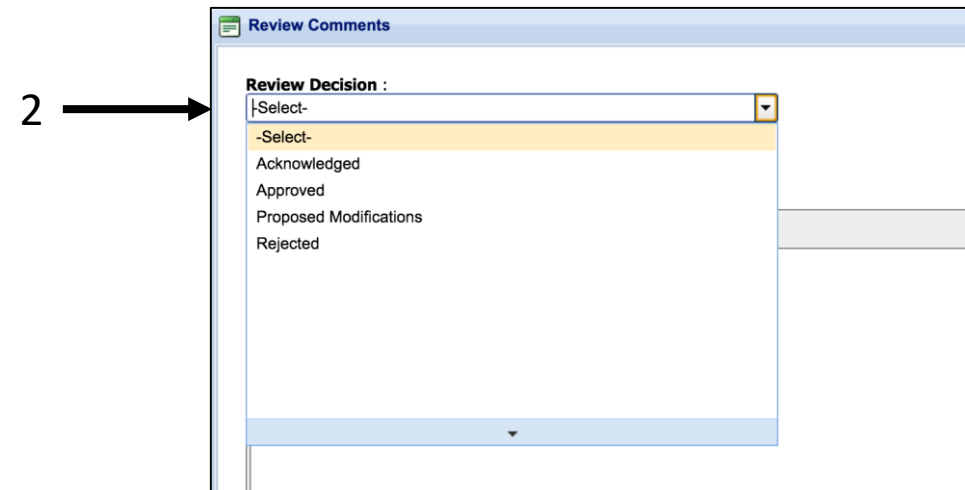
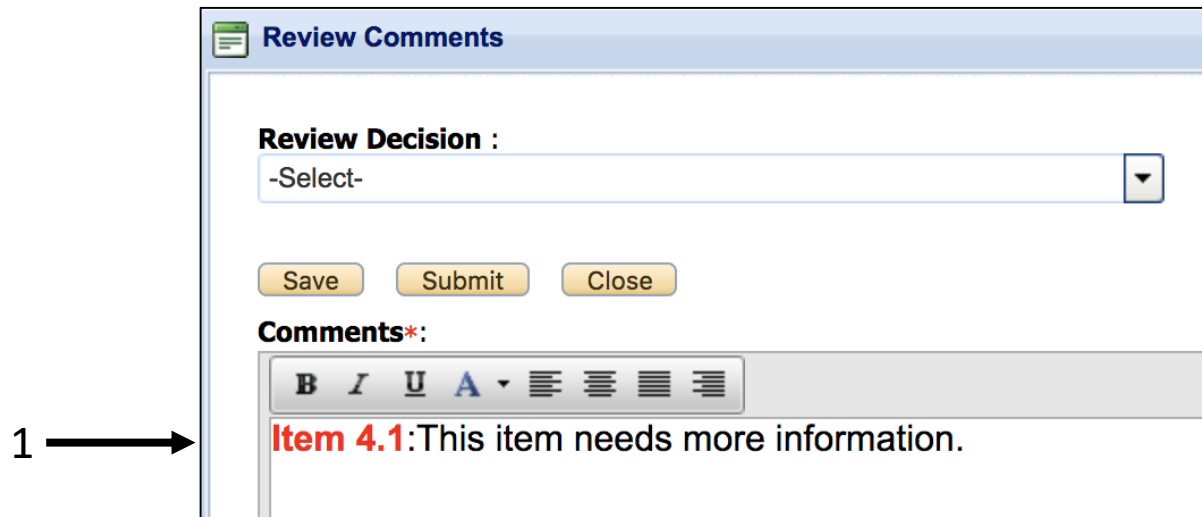
Once you have compiled your comments in Word, you can then copy and paste them *as plain text* into the **Comments Window** which appears when you click the **Review** button as seen in the screenshots below. **Be sure to delete the Word document on your computer once you are finished with your review.**



Once you have entered your review comments in the “Comments” window, you have three options.

- i. To save your comments and make additional edits at another time, or if you are waiting for a response from another reviewer, click the **Save** button.
- ii. Once you have completed your review, click the **Submit** button. The application will move to “Application Requiring your Review as a Reviewer – In Progress”, you will continue to have access to the application until the Chair submits his/her decision.
- iii. Close the Comments window without saving your comments, by clicking the **Close** button.

If you are assigned as Chair, you will review an application following the same procedures as [Adding and Submitting Reviewer Comments](#). When you are preparing to submit your review you must select a review decision. **Please ensure all reviewers have completed their review prior to submitting a review decision.** If you submit a review decision prematurely, please contact the RIS Workflow Coordinator (RISworkflow@mun.ca) to unlock the decision.



- An event form is an additional submission made by the PI or Project Team that is related to an active file. Event forms include items such as amendments.
- Completing a review of an event form is similar to a review of an application. You will receive an email when you are assigned as a reviewer for an event form, and the new review assignment will appear on your Researcher Portal Home Page. You will follow the same procedure to login to the Memorial Researcher Portal. To access the event form, you will click the appropriate event link on the Memorial Researcher Portal Home page.

# Opening an Event Form Assignment

To select the appropriate file, click the **View Event** Button. If you wish to reference the associated application to an Event Form, click the **View Application** Button.

Powered by Process Pathways

Welcome: Jane Smith | Home | My Profile | Contact Us | Help | Logout



Memorial  
Researcher Portal

APPLY NEW | News | Useful Links | Settings

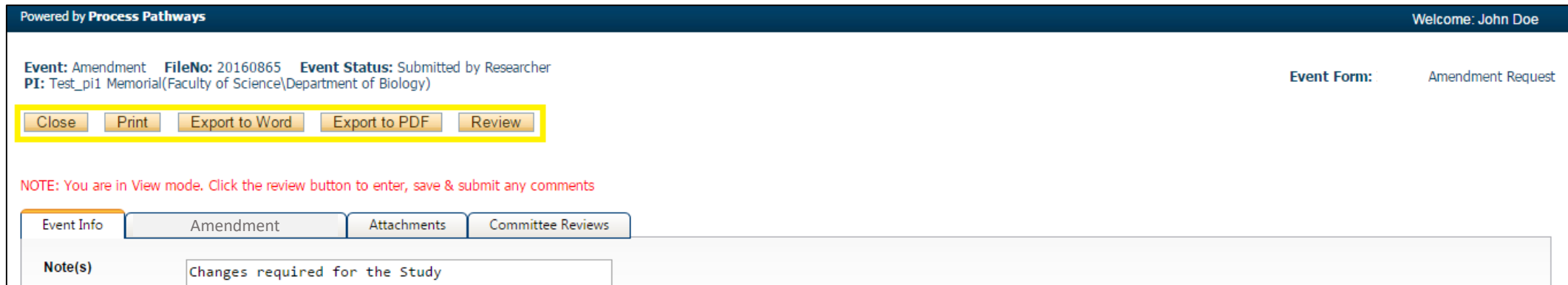
Reset Filters | Export To Excel

|  | File No  | Principal Investigator | Project Title        | Event Category | Event Status            |
|--|----------|------------------------|----------------------|----------------|-------------------------|
|  |          |                        |                      | All            | All                     |
| <b>View Event</b><br><b>View Application</b> | 20161620 | Dr. John Doe           | Research Project 123 | Amendment      | Submitted by Researcher |

# Event Form Action Buttons

The buttons that appear at the top of an event form are the **Event Form Action Buttons**. Select these buttons to:

- **Close:** Exit the event form and return to the Memorial Researcher Portal Home Page.
- **Print:** Print the event form in the pre-set layout.
- **Export to Word:** Open the event form as a Word Document.
- **Export to PDF:** Open the event form as a PDF.
- **Review:** Enter comments and complete your review of the event form.



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

**Event:** Amendment **FileNo:** 20160865 **Event Status:** Submitted by Researcher  
**PI:** Test\_pi1 Memorial(Faculty of Science\Department of Biology) **Event Form:** Amendment Request

[Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Review](#)

NOTE: You are in View mode. Click the review button to enter, save & submit any comments

[Event Info](#) [Amendment](#) [Attachments](#) [Committee Reviews](#)

**Note(s)**

# Reviewing an Event Form

If you wish to review an event form in the Memorial Researcher Portal, you will navigate through the various tabs highlighted below to see the information the PI and Project Team has provided. The tabs include Event Info, Event Form Custom Questions, and Attachments. **The Committee Reviews tab is only visible to reviewers.** You may also follow the same instruction as [Adding and Submitting Reviewer Comments Cont'd](#) to export the event form to a Word document or PDF.



Powered by Process Pathways Welcome: John Doe

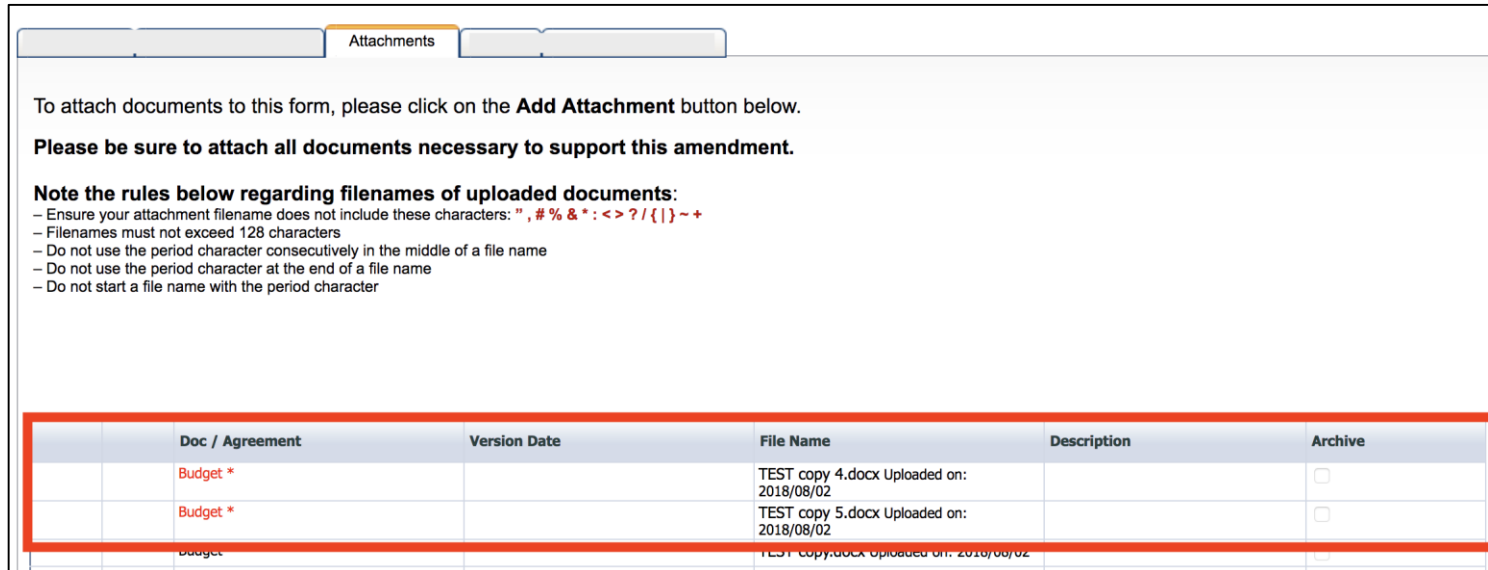
Event: Amendment FileNo: 20160865 Event Status: Submitted by Researcher  
PI: Test\_pi1 Memorial(Faculty of Science)Department of Biology Event Form: Amendment Request

NOTE: You are in View mode. Click the review button to enter, save & submit any comments

Event Info

Note(s)

- **Event Info:** Includes any comments about the event form.
- **Event Form Custom Questions Tab:** This tab will be named after the event form you are completing. It contains questions that are specific to the type of event form. **There may be various subtabs within this tab.** Be careful while navigating the subtabs so you do not miss any information.
- **Attachments Tab:** Allows you to view any attachments added to the event form by the PI or Project Team. Similar to applications, *if any attachments have been highlighted by the awards office*, they will be at the top of the list in **red** text.



To attach documents to this form, please click on the **Add Attachment** button below.

**Please be sure to attach all documents necessary to support this amendment.**

**Note the rules below regarding filenames of uploaded documents:**

- 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

|  | Doc / Agreement | Version Date | File Name                                   | Description | Archive                  |
|--|-----------------|--------------|---|-------------|--------------------------|
|  | Budget *        |              | TEST copy 4.docx Uploaded on:<br>2018/08/02 |             | <input type="checkbox"/> |
|  | Budget *        |              | TEST copy 5.docx Uploaded on:<br>2018/08/02 |             | <input type="checkbox"/> |
|  | Budget          |              | TEST copy.docx Uploaded on: 2018/08/02      |             | <input type="checkbox"/> |



In order to complete your review, please reference the following pages hyperlinked below:

- [Committee Reviews Tab](#)
- [Adding Reviewer Comments](#)
- [Reviewing as Chair](#)

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.