



Researcher User Manual

Creating a New *Research Funding* Application for Marine Institute processing

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

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

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The Memorial Researcher Portal does NOT have an automatic save feature.

When working in an application, click the Save button regularly to avoid data loss.

Notes about research funding applications:

The **Researcher Portal research funding application** is internal to Memorial University for **internal processing only**.

It does NOT take the place of a sponsor-specific portal, such as those associated with Tri-Council funding. The Memorial Researcher Portal application is used *in addition* to the application developed and submitted in the external portal.

Notes about research funding applications:

Research funding applications are currently available for RIS and Marine Institute (MI) only. Specific types of applications that are NOT currently submitted through the Researcher Portal:

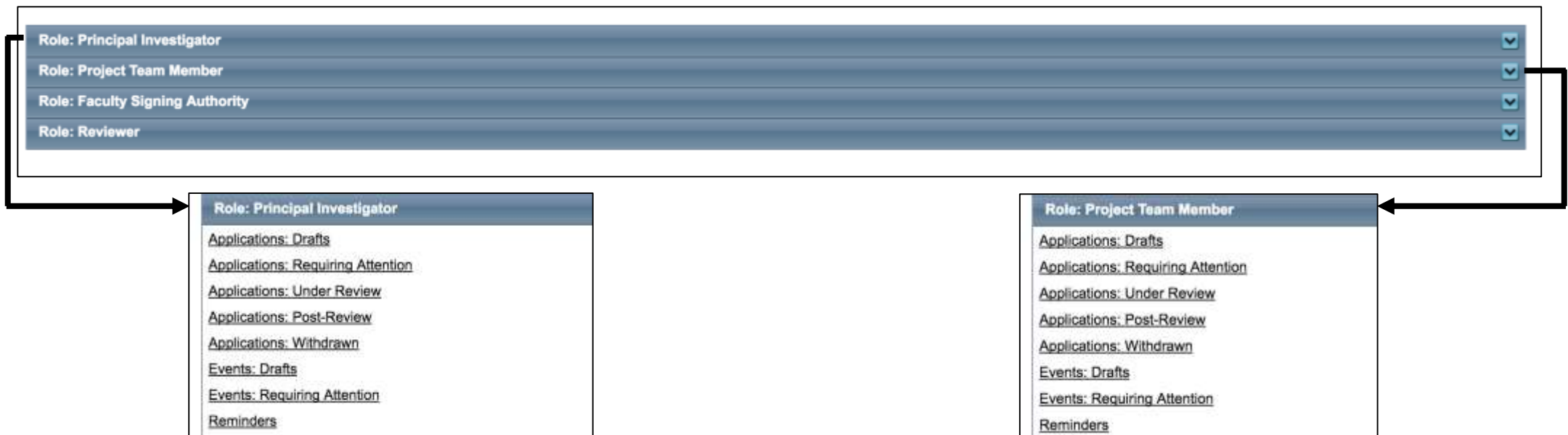
- Canada Foundation for Innovation (coordinated by CCCS)
- Canada Research Chairs (coordinated by CCCS)
- School of Graduate Studies fellowships and scholarships (coordinated by SGS)
- Undergraduate Student Research Awards (USRA)

Researchers are encouraged to consult with their academic unit if there is uncertainty around choosing an appropriate application option.

PI or Project Team Role Blocks

When you login to the Memorial Researcher Portal you will see the Home Page. The ***Principal Investigator (PI) and Project Team Member Role Blocks*** provide 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 Blocks 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) or the Marine Institute Finance and Contracts Office. 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 Blocks 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 the Research Initiatives & Services (RIS) office, by the Marine Institute Finance and Contracts Office, or by an ethics office. 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.



The screenshot shows the Memorial Researcher Portal Home Page. At the top, there is a dark blue navigation bar with the text "Powered by Process Pathways | Product Info" on the left and "Welcome: John Doe | Home | My Profile | Contact Us | Help | Logout" on the right. Below this is a large banner area with the Memorial University logo on the left and the text "Memorial Researcher Portal" in the center. Underneath the banner is a light blue navigation bar containing "BACK TO HOME" on the left, "APPLY NEW" in the center (highlighted with a red box), and "News | Useful Links" on the right. At the bottom, there is a dark blue sidebar with two entries: "Role: Principal Investigator" and "Role: Project Team Member", each with a checkmark icon to its right.

New Application Forms

You will be brought to the New Application Forms page. The applications are organized by office, and the application names are hyperlinked. To start a new application, click the name of the application you wish to choose. A new application will be launched. **Please ensure you are filling out the proper form for the appropriate office.**



Powered by Process Pathways

Welcome: John Doe | Home | My Profile | Contact Us | Help | Logout

Memorial
Researcher Portal

APPLY NEW | News | Useful Links | Settings

New Application Forms

Interdisciplinary Committee on Ethics in Human Research (ICEHR)

Application Name	Description	Status
ICEHR - Application for Ethics Review	Application for ethics review for research in the social sciences and humanities for M/N faculty, staff, and student research on St. John's campus.	Open
ICEHR - Application for Secondary Review	Application for ethics review for secondary research in the social sciences and humanities by M/N faculty, staff, and student research on St. John's campus.	Open
ICEHR - Application for Ethics Review (Sub-Project)	Application for ethics review for research in the social sciences and humanities by students working on a sub-portion of a faculty member's already approved project as part of their dissertation, thesis, or other degree requirements. Researchers are required to consult with ICEHR prior to completing this application form to determine eligibility. For M/N faculty, staff, and student research on St. John's campus ONLY.	Open

Grenfell Campus Research Ethics Board (GC-REB)

Application Name	Description	Status
GC-REB - Application for Ethics Review Form	Application for ethics review for research in the social sciences and humanities for M/N faculty, staff, and student research on Grenfell	Open

Important Note for MI Researchers

Depending upon the funding opportunity, MI researchers may either be using applications under the Marine Institute heading or the RIS heading.

Read the application descriptions next to the available applications to ensure you are selecting the one appropriate to your needs.


This manual focuses on the Marine Institute-specific application. Please see the manual, “Creating a New Application_RIS,” if using the RIS application.

Selecting the appropriate application is important, as it determines whether the application ultimately arrives with the Marine Institute Finance and Contracts Office or RIS.

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.

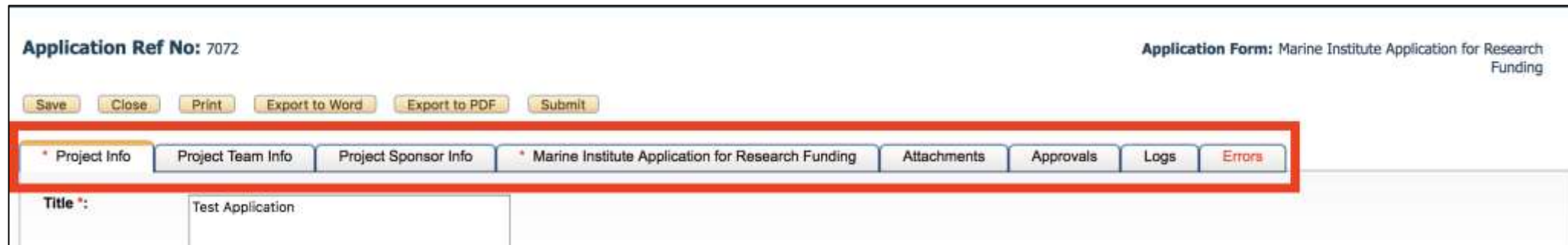


The screenshot displays a web application interface. At the top left, it shows "Application Ref No: 7072". At the top right, it says "Application Form: Marine Institute Application for Research Funding". A red rectangular box highlights a row of six buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". Below this row is a horizontal navigation bar with several tabs: "Project Info", "Project Team Info", "Project Sponsor Info", "Marine Institute Application for Research Funding" (which is the active tab), "Attachments", "Approvals", "Logs", and "Errors". Below the navigation bar, there is a form field labeled "Title *" with the text "Test Application" entered.

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.

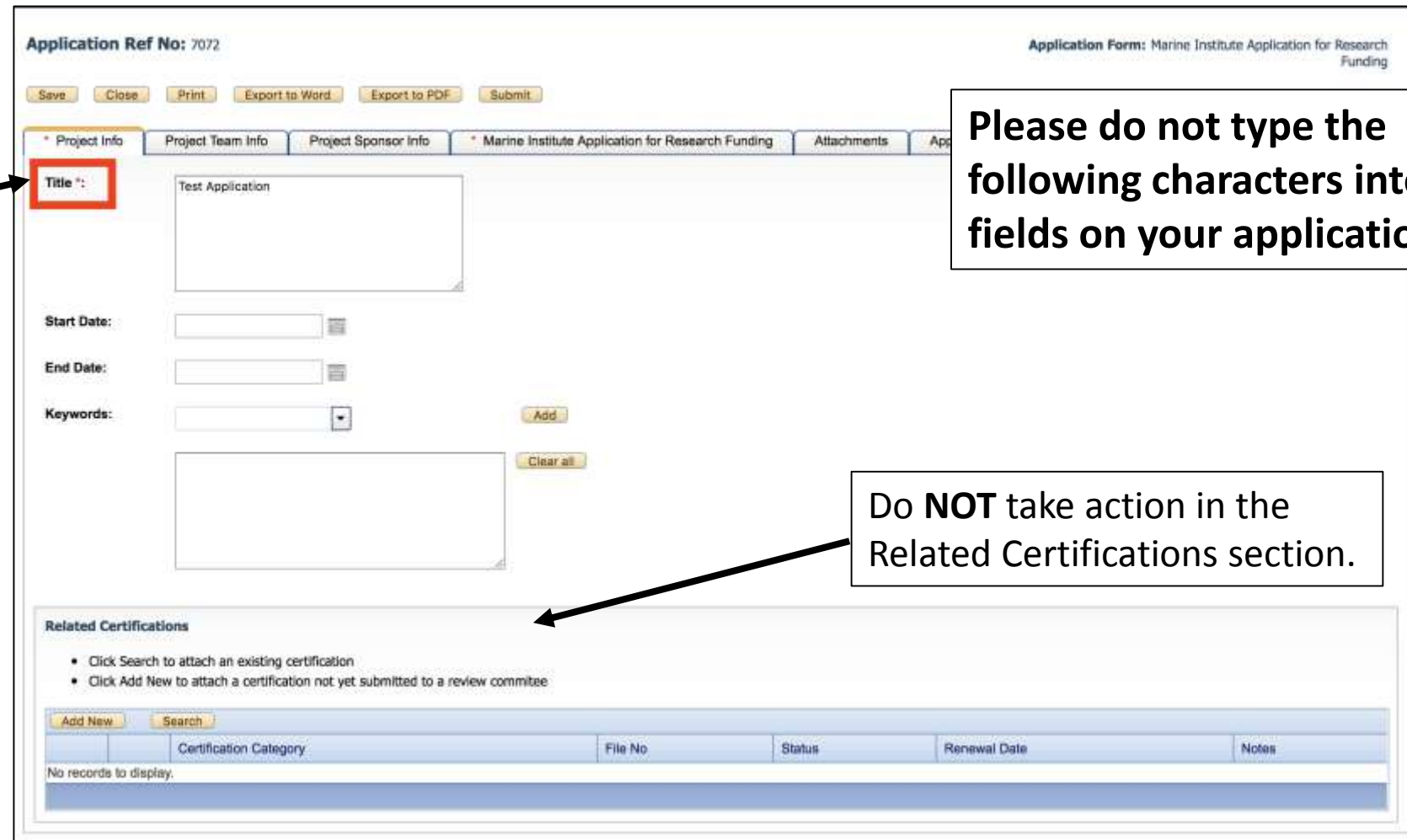
NOTE: Click **Save** as often as possible while completing your application!



The screenshot shows an application form interface. At the top left, it says "Application Ref No: 7072". At the top right, it says "Application Form: Marine Institute Application for Research Funding". Below this, there are several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". A red box highlights a row of tabs: "* Project Info", "Project Team Info", "Project Sponsor Info", "* Marine Institute Application for Research Funding", "Attachments", "Approvals", "Logs", and "Errors". Below the tabs, there is a form field labeled "Title *" with the text "Test Application" entered.

Project Info Tab

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



The screenshot shows the 'Project Info' tab of an application form. At the top, it displays 'Application Ref No: 7072' and 'Application Form: Marine Institute Application for Research Funding'. Below this are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The 'Project Info' tab is selected, and the 'Title' field is highlighted with a red box and contains the text 'Test Application'. Other fields include 'Start Date', 'End Date', and 'Keywords'. A 'Related Certifications' section is at the bottom, featuring 'Add New' and 'Search' buttons and a table with columns for 'Certification Category', 'File No', 'Status', 'Renewal Date', and 'Notes'. The table currently shows 'No records to display'.

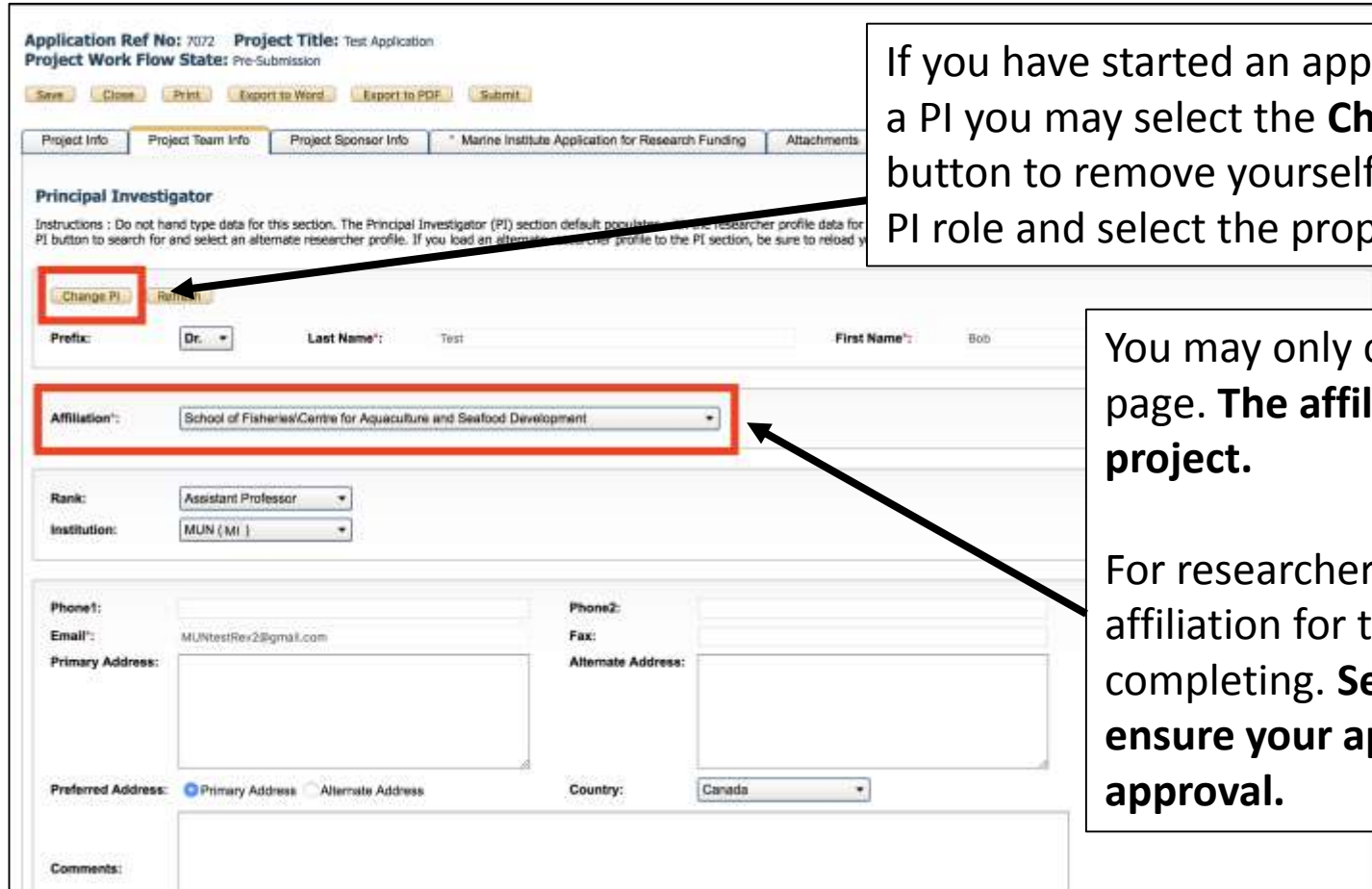
IMPORTANT: Please note that all fields that have a red asterisk * are required. Failing to complete these fields will prevent the PI from submitting the application. See [Errors Tab](#) for more information.

Please do not type the following characters into any fields on your application < >

Do **NOT** take action in the Related Certifications section.

Project Team Info Tab

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



Application Ref No: 7072 Project Title: Test Application
Project Work Flow State: Pre-Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Project Sponsor Info Marine Institute Application for Research Funding Attachments

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 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 page.

Change PI Remove

Prefix: Dr. Last Name: Test First Name: Bob

Affiliation: School of Fisheries/Centre for Aquaculture and Seafood Development

Rank: Assistant Professor

Institution: MUN (MI)

Phone1: Phone2:

Email: MUNtestRev2@gmail.com Fax:

Primary Address: Alternate Address:

Preferred Address: Primary Address Alternate Address Country: Canada

Comments:

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** and **email address** on this page. **The affiliation/email listed on this page applies only to this project.**

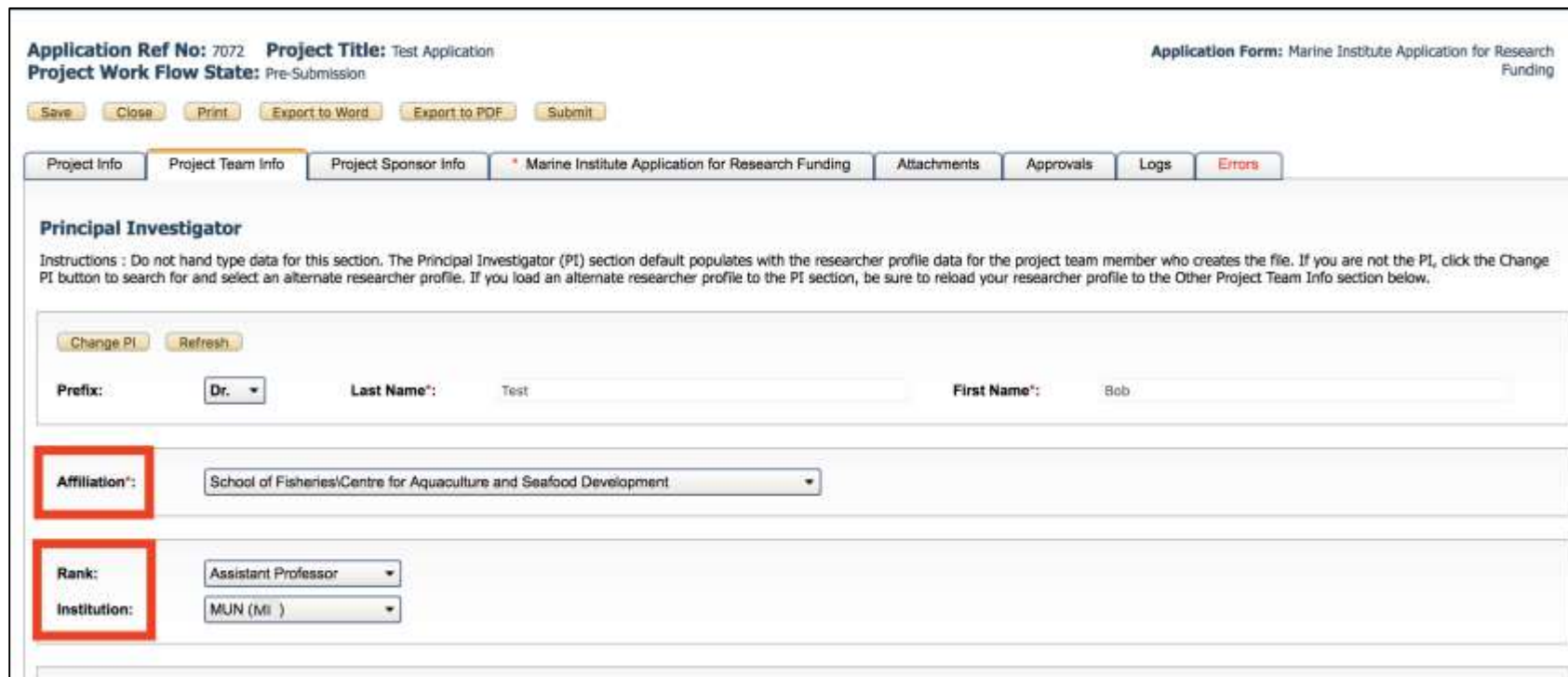
For researchers with multiple affiliations, ensure that the affiliation for the PI is appropriate for the application you are completing. **Selecting the appropriate affiliation is critical to ensure your application is routed to the correct Centre for approval.**

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: 7072 **Project Title:** Test Application **Application Form:** Marine Institute Application for Research Funding
Project Work Flow State: Pre-Submission

Save Close Print Export to Word Export to PDF Submit

Project Info **Project Team Info** Project Sponsor Info Marine Institute Application for Research Funding 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: Dr. Last Name*: Test First Name*: Bob

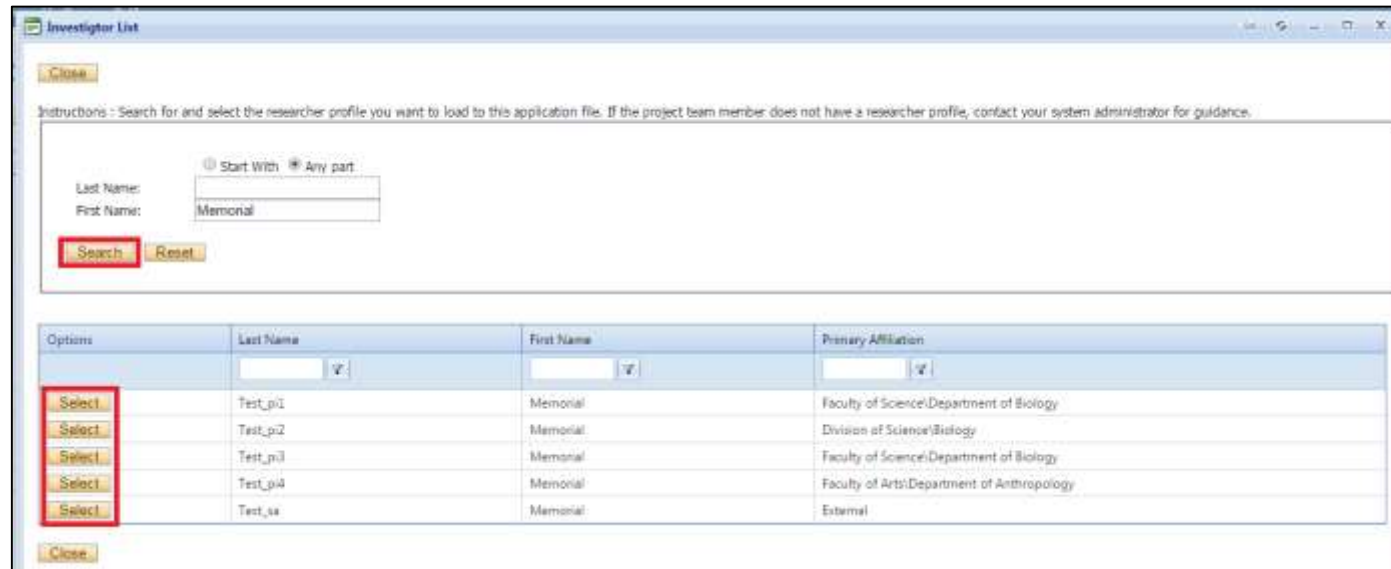
Affiliation*: School of Fisheries/Centre for Aquaculture and Seafood Development

Rank: Assistant Professor

Institution: MUN (MI)

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 "Close" button at the top left. Below the title bar, there is a "Close" button and a set 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, there are search criteria fields: "Last Name:" with a dropdown menu set to "Start With" and "Any part", and "First Name:" with a text input field containing "Memorial". There are "Search" and "Reset" buttons below these fields. The main area of the window contains a table with columns: "Options", "Last Name", "First Name", and "Primary Affiliation". The table has five rows, each with a "Select" button in the "Options" column. The first row is highlighted with a red box. Below the table is a "Close" button.

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_sa	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

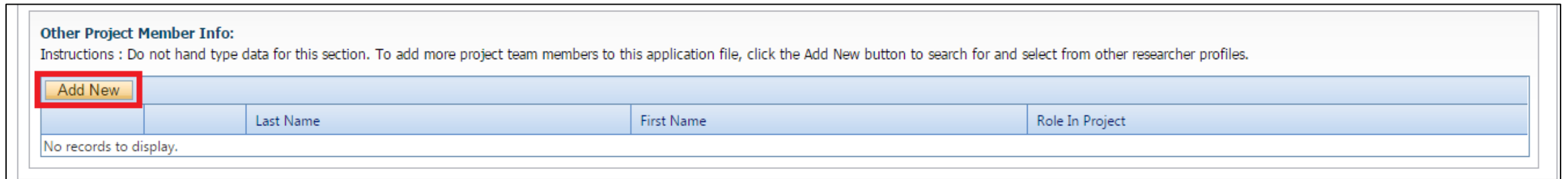
You are required to list all project team members in the Project Team Info tab.

Follow the instructions in the subsequent slides to appropriately add project team members. As Project Team Members access the application through the Memorial Researcher Portal, you must ensure they have an account.

If they do not have an account, 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, click **Add New** at the bottom of the Project Team Info Tab.

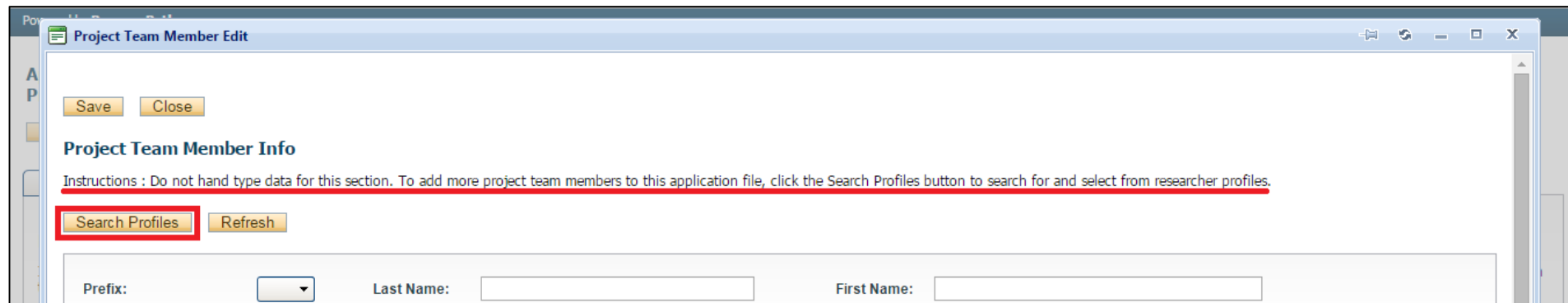


Other Project Member Info:
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

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 Profiles button to add a Project Team Member!**



Project Team Member Edit

Save Close

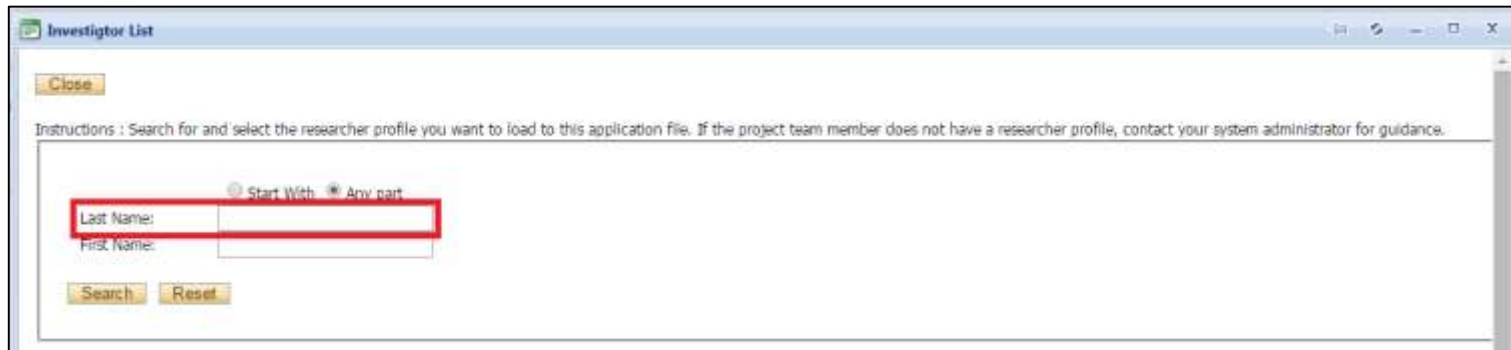
Project Team Member Info
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles.

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 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 are two radio buttons: "Start With" (selected) and "Any part". Underneath 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 two buttons: "Search" and "Reset".

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

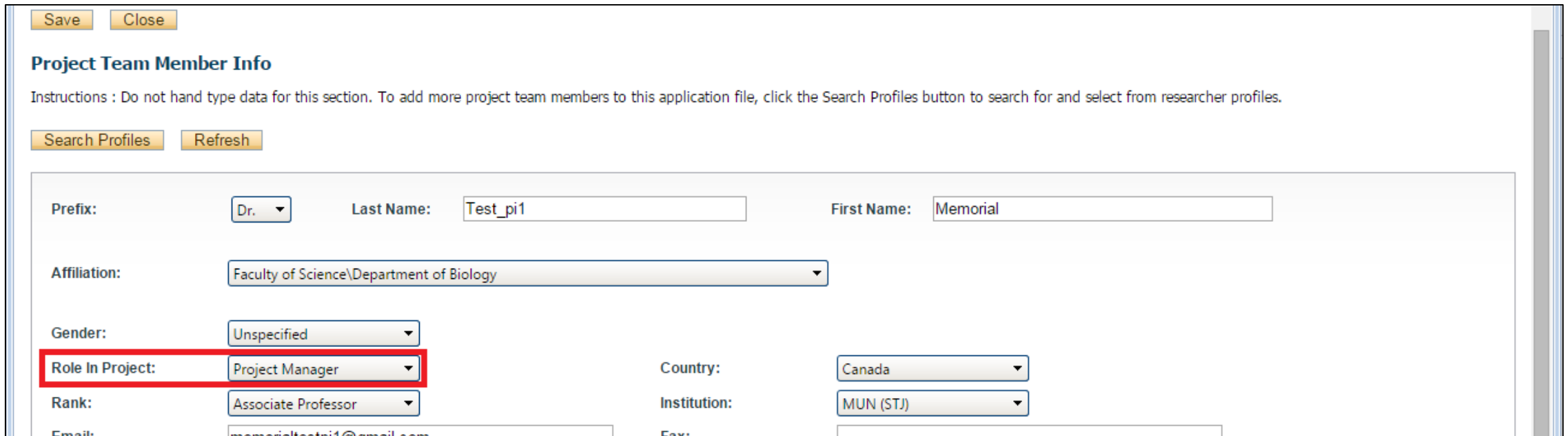


The screenshot shows the search results section of the "Investigator List" window. At the top, the "Last Name:" field contains "test_pi1" and the "First Name:" field is empty. Below these fields are "Search" and "Reset" buttons. Below the search fields is a table with the following structure:

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 Member's **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), "Institution" (MUN (STJ)), "Email" (memorialtestpi1@gmail.com), and "Fax" (empty).

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

Adding a Project Team Member Cont'd

- If one of your team members does not have a Memorial Researcher Portal account, direct the 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 team members has a Memorial Researcher Portal account but does not appear in the database using the search button, **DO NOT manually add the team member**. Please submit a help desk ticket at <https://rpresources.mun.ca/help-2/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.**

Other Project Team Members for Research Funding Applications:

Research funding applications **require** an additional team member. This person will help to ensure the application is appropriately processed.

- **Steve Moyse**, MI Research Liasion Officer

Add this team member in the initial stage of your application to ensure that they are able to assist in the processing of your application. **This individual will be in contact with you while you are drafting and before you submit your application, so do not add them at the last minute.**

Adding the MI Grants and Contracts Officer:

Follow the same process to add a Project Team Member.

Search for the appropriate individual in the Investigator List window:

- Search for the last name “Moyses” and select “Steve Moyses”

On the Project Team Member Info screen, choose “Grant Facilitator” for the Role in Project.

Project Sponsor Info Tab

In the Researcher Portal, a “sponsor” is the agency, institution, or company associated with a program.

The Project Sponsor Info tab is where details about the programs associated with an application are provided. *More than one sponsor and program can be added to an application, as appropriate.*

To add a sponsor and program, click **Add New** on the Project Sponsor Info tab. The Sponsor Info window will appear.

You may click **Add New** to add additional sponsors and programs after creating your first sponsor entry, if applicable.

Project Sponsor Info Tab Cont'd

In the Sponsor Info window, enter the following and click **Save**:

- **Agency** - Click on Agency. Search for either Agency Name or Abbreviation. Select the appropriate agency for your application.
- **Program** – Select from the dropdown list, which is specific for the agency.
- **Competition Date** (if applicable)

If you cannot locate the program you need, contact the Steve Moyse (Steve.Moyse@mi.mun.ca or **709.778.0354**) for assistance.



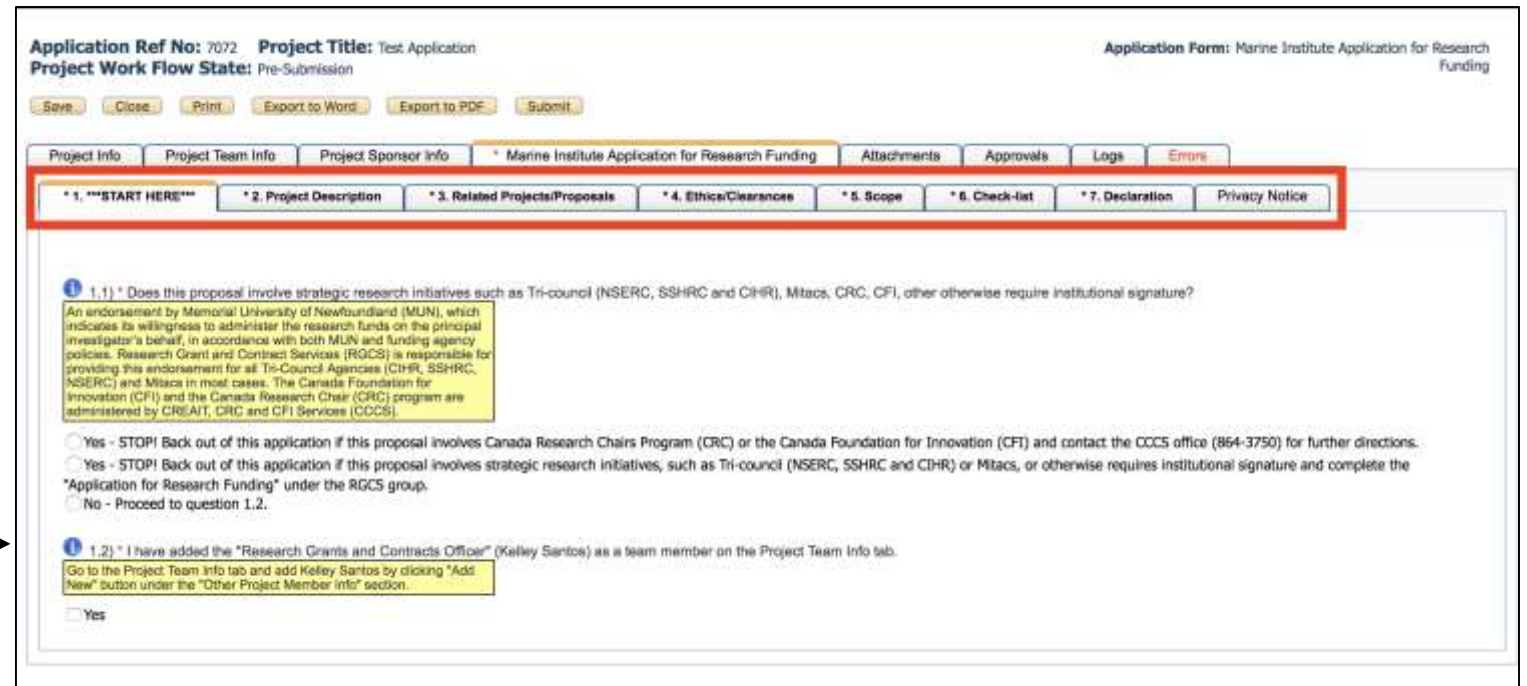
The screenshot shows a web application window titled "Sponsor Info". At the top, there are "Save" and "Close" buttons. Below them, the "Sponsor Info." section contains several fields. The "Agency:" field is a search box with a dropdown arrow, highlighted with a red box. The "Program:" field is a dropdown menu, also highlighted with a red box. The "Start Date:" and "End Date:" fields are date pickers. The "Competition Date:" field is a date picker, highlighted with a red box. The "Currency Type:" field is a dropdown menu with "CAD" selected. To the right of these fields, there are "Fiscal Year:" and "Agency Reference No:" text input fields. At the bottom right, there is an "Investigator:" dropdown menu with "Dr. John Doe (Principal Investigator)" selected.

Application Custom Questions Tab

This tab includes all the questions that are directly related to your particular application. There will often be a number of sub-tabs that organize the application questions into different areas. If you are unsure how to complete a question, look for yellow text boxes that may contain additional information.

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 expand or collapse providing additional information.



Application Ref No: 7072 Project Title: Test Application
Project Work Flow State: Pre-Submission
Application Form: Marine Institute Application for Research Funding

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Project Sponsor Info * Marine Institute Application for Research Funding Attachments Approvals Logs Errors

* 1. **START HERE** * 2. Project Description * 3. Related Projects/Proposals * 4. Ethics/Clearances * 5. Scope * 6. Check-list * 7. Declaration Privacy Notice

1.1) * Does this proposal involve strategic research initiatives such as Tri-council (NSERC, SSHRC and CIHR), Mitacs, CRC, CFI, other otherwise require institutional signature?

An endorsement by Memorial University of Newfoundland (MUN), which indicates its willingness to administer the research funds on the principal investigator's behalf, in accordance with both MUN and funding agency policies. Research Grant and Contract Services (RGCS) is responsible for providing this endorsement for all Tri-Council Agencies (CIHR, SSHRC, NSERC) and Mitacs in most cases. The Canada Foundation for Innovation (CFI) and the Canada Research Chair (CRC) program are administered by CREAT, CRC and CFI Services (CCCS).

Yes - STOP! Back out of this application if this proposal involves Canada Research Chairs Program (CRC) or the Canada Foundation for Innovation (CFI) and contact the CCCS office (864-3750) for further directions.

Yes - STOP! Back out of this application if this proposal involves strategic research initiatives, such as Tri-council (NSERC, SSHRC and CIHR) or Mitacs, or otherwise requires institutional signature and complete the "Application for Research Funding" under the RGCS group.

No - Proceed to question 1.2.

1.2) * I have added the "Research Grants and Contracts Officer" (Kelly Santos) as a team member on the Project Team Info tab.

Go to the Project Team Info tab and add Kelly Santos by clicking "Add New" button under the "Other Project Member Info" section.

Yes

Application Custom Questions Tab Cont'd

If an application contains a sub-tab that is entitled “***START HERE***,” please begin with these questions, as they may direct you to complete a different application form than the one you have initiated.

Also, some sub-tabs may contain required questions. Those tabs that contain required questions have an asterisk next to the tab name, and required questions have a red asterisk (*).

Once all the required questions on the tab have been completed, the tab’s name no longer appears bolded, and the asterisk next to its name disappears.

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.



Application Ref No: 7072 Project Title: Test Application
Project Work Flow State: Pre-Submission
Application Form: Marine Institute Application for Research Funding

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Project Sponsor Info Marine Institute Application for Research Funding **Attachments** Approvals Logs

To attach documents to your application, please click on the **Add Attachment** button below.

Please be sure to include all documents necessary to support your proposal. These include:

- Proposal Transmittal Form
- Budget
- Letters of Support

Please keep in mind the following information regarding file names:

- 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

Add Attachment

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.

File Name Guidelines for Attachments

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

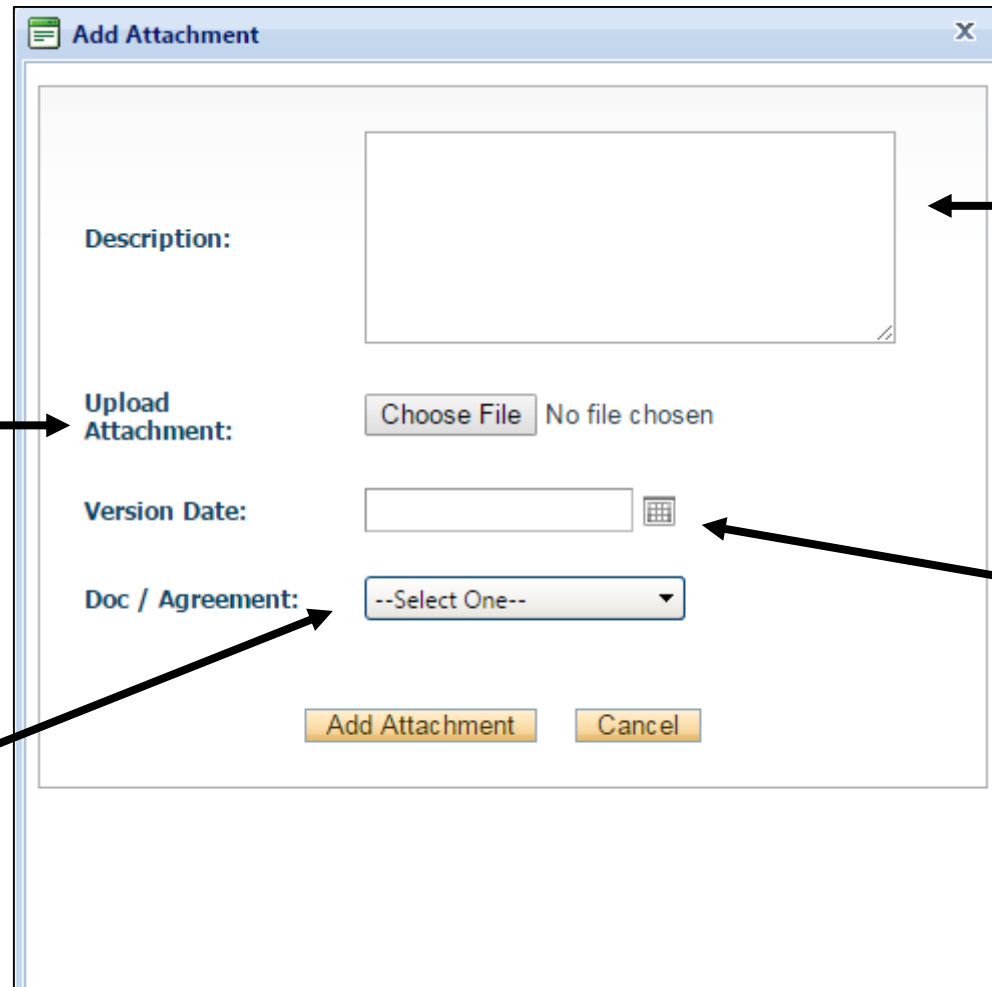
- Ensure your attachment filename does not include these characters: " # % & * : < > ? / { | } ~ [] +
- Filenames must not exceed 128 characters.
- Do not use the period character consecutively in the middle of a file name.
- Do not use the period character at the end of a file name.
- Do not start a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

Attachments Tab Cont'd

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



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.
- Doc / Agreement:** A dropdown menu with "--Select One--" as the selected option.
- Buttons:** "Add Attachment" and "Cancel" buttons at the bottom.

In order to select a file to upload, click **Choose File**.

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

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

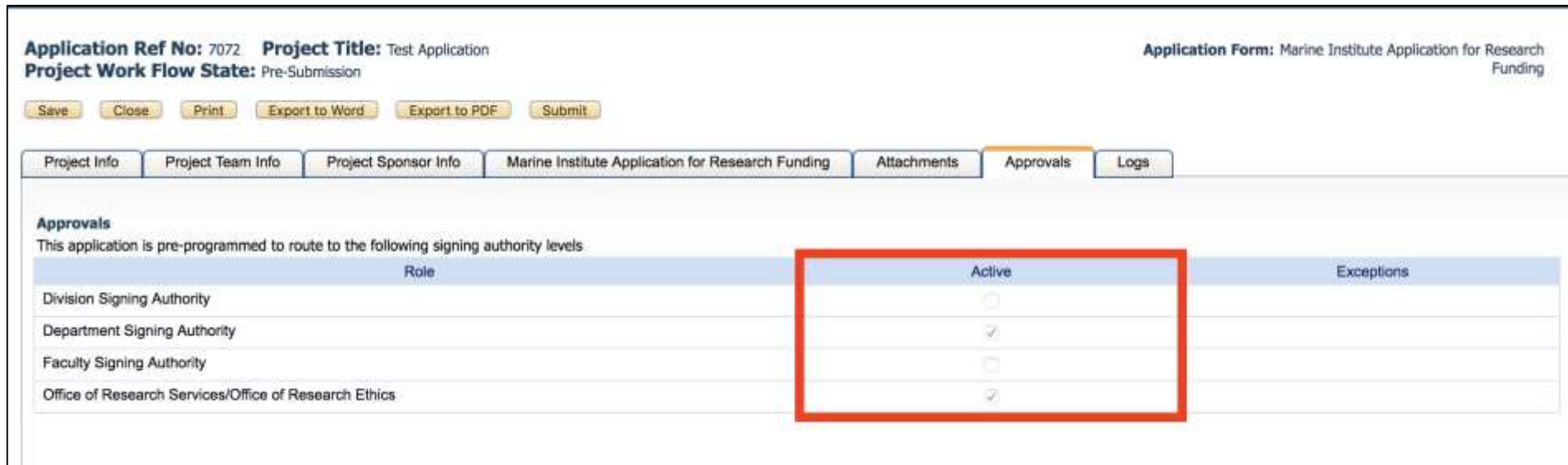
The date when the document was finalized. If you have multiple versions of the same document prior to submission, it is recommended you delete the outdated attachments.

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). This is for information ONLY.

Signing Authorities are determined by the PI's affiliation on the Project Team Info tab. For MI researchers, "Department" refers to the Centre-level.

Depending on the application, "Office of Research Services" could refer to RIS or the Marine Institute Finance and Contracts Office.



Application Ref No: 7072 Project Title: Test Application Application Form: Marine Institute Application for Research Funding
Project Work Flow State: Pre-Submission

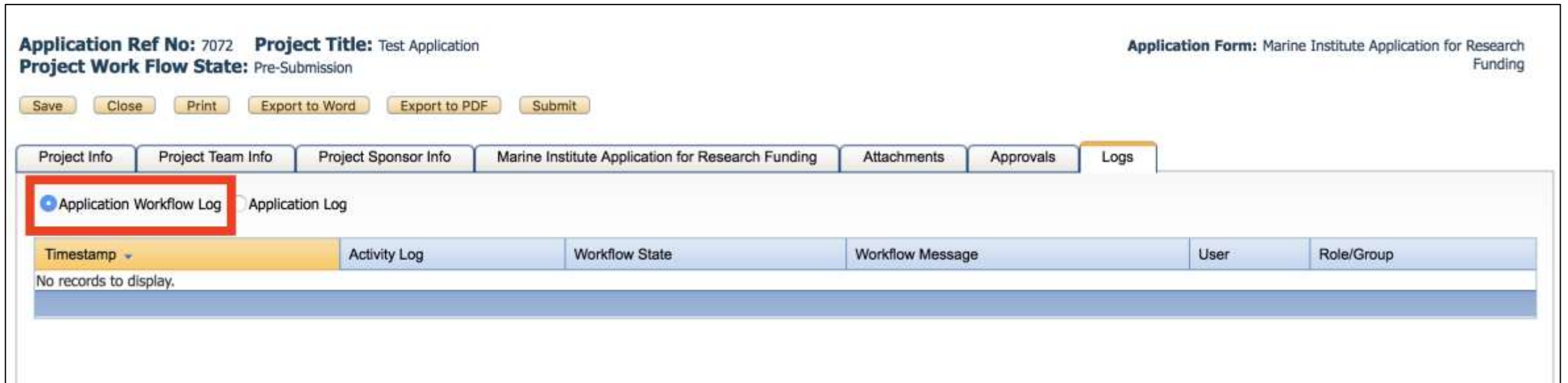
Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Project Sponsor Info Marine Institute Application for Research Funding Attachments Approvals Logs

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 checked="" type="checkbox"/>	
Faculty Signing Authority	<input type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

The Log Tab allows the PI and Project Team Members to view all actions on a file. Under the Workflow Log you can track the history of the application. It tracks and time stamps approvals and messages at all stages of the application's workflow.



The screenshot shows a web interface for an application. At the top, it displays 'Application Ref No: 7072' and 'Project Title: Test Application'. Below this, it shows 'Project Work Flow State: Pre-Submission' and 'Application Form: Marine Institute Application for Research Funding'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. A navigation bar contains tabs for 'Project Info', 'Project Team Info', 'Project Sponsor Info', 'Marine Institute Application for Research Funding', 'Attachments', 'Approvals', and 'Logs'. The 'Logs' tab is active, and within it, 'Application Workflow Log' is selected. Below the navigation, a table header is visible with columns: 'Timestamp', 'Activity Log', 'Workflow State', 'Workflow Message', 'User', and 'Role/Group'. The table content area 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 shows the 'Application Log' tab selected in a web application. The interface includes a header with application details, a toolbar with buttons like 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit', and a navigation menu with tabs for 'Project Info', 'Project Team Info', 'Project Sponsor Info', 'Marine Institute Application for Research Funding', 'Attachments', 'Approvals', and 'Logs'. The 'Application Log' tab is active, showing a table of log entries. The first entry is dated 2017/12/05 15:44 and is attributed to 'Bob Test'. The log text describes changes to investigator information, funding application status, project description, and scope.

Application Ref No: 7072 Project Title: Test Application
Project Work Flow State: Pre-Submission
Application Form: Marine Institute Application for Research Funding

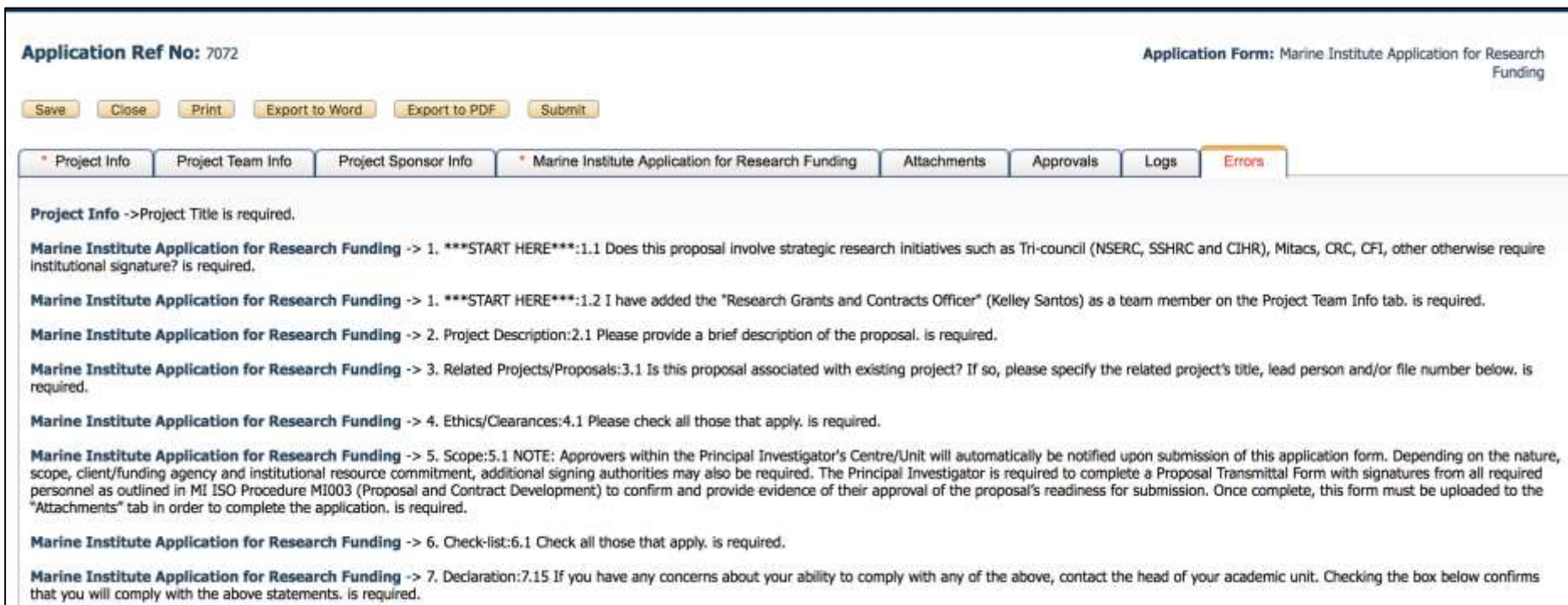
Application Saved

Project Info Project Team Info Project Sponsor Info Marine Institute Application for Research Funding Attachments Approvals **Logs**

Application Workflow Log Application Log

Timestamp	Log Activity	User
2017/12/05 15:44	<p>For Investigator Dr. Bob Test</p> <ul style="list-style-type: none">-> Affiliation has been changed from 'Faculty of Science/Department of Biology' to 'School of Fisheries/Centre for Aquaculture and Seafood Development'-> Phone1 has been changed from '709-864-9999' to ''-> Mailing Address has been changed from 'Memorial University of Newfoundland Room 234 Science Building 230 Elizabeth Avenue, St. John's, NL, Canada A1C 5S7' to ''*-> Use Of Address has been changed from '' to 'Primary Address' <p>Marine Institute Application for Research Funding:</p> <ul style="list-style-type: none">5. Check-list -> Check all those that apply, has been changed from '' to 'I have uploaded the Proposal Transmittal Form with all of the required signatures as outlined in M1003 (Proposal and Contract Development) to the "Attachments" tab.'2. Project Description -> Please provide a brief description of the proposal, has been changed from '' to 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus congue aliquam odio et pellentesque. Quisque luctus sagittis varius. Proin leo orci, feugiat vitae ultricies vitae, efficitur porttitor lacus. Aliquam viverra ultricies interdum. Vivamus a sem odio. Sed imperdiet commodo lectus sed vulputate. Integer rhoncus, lorem vulputate tincidunt efficitur, nisi ex condimentum est, id varius est enim et nisi. Mauris vitae enim et ex tempus facilisis eu a tellus. Ut auctor ante urna, eget vestibulum magna accumsan a. Ut dolor sem, ullamcorper eget purus nec, elementum accumsan metus. Curabitur commodo id arcu sit amet venenatis. Donec condimentum rutrum erat, pulvinar consectetur tellus vulputate et. Interdum et malesuada fames ac ante ipsum primis in faucibus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vivamus lobortis nisi eu lacus dictum, eu hendrerit augue auctor. Donec tristique nibh quis vulputate maximus.'5. Scope -> NOTE: Approvers within the Principal Investigator's Centre/Unit will automatically be notified upon submission of this application form. Depending on the nature, scope, client/funding agency and institutional resource commitment, additional signing authorities may also be required. The Principal Investigator is required to complete a Proposal Transmittal Form with signatures from all required personnel as outlined in MI ISO Procedure M1003 (Proposal and Contract Development) to confirm and provide evidence of their approval of the proposal's readiness for submission. Once complete, this form must be uploaded to the "Attachments" tab in order to complete the application, has been changed from '' to 'As Principal Investigator, I understand the approval requirements stated above.'1. ***START HERE*** -> Does this proposal involve strategic research initiatives such as Tri-council (NSERC, SSHRC and CIHR), Mitacs, CRC, CFI, other otherwise require institutional signature? has been changed from '' to 'No - Proceed to question 1.2.'4. Ethics/Clearances -> Please check all those that apply, has been changed from '' to 'No clearances are required.'	Bob Test

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.**



Application Ref No: 7072 **Application Form:** Marine Institute Application for Research Funding

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Project Sponsor Info * Marine Institute Application for Research Funding Attachments Approvals Logs **Errors**

Project Info ->Project Title is required.

Marine Institute Application for Research Funding -> 1. *****START HERE***:1.1** Does this proposal involve strategic research initiatives such as Tri-council (NSERC, SSHRC and CIHR), Mitacs, CRC, CFI, other otherwise require institutional signature? Is required.

Marine Institute Application for Research Funding -> 1. *****START HERE***:1.2** I have added the "Research Grants and Contracts Officer" (Kelley Santos) as a team member on the Project Team Info tab. is required.

Marine Institute Application for Research Funding -> 2. **Project Description:2.1** Please provide a brief description of the proposal. Is required.

Marine Institute Application for Research Funding -> 3. **Related Projects/Proposals:3.1** Is this proposal associated with existing project? If so, please specify the related project's title, lead person and/or file number below. is required.

Marine Institute Application for Research Funding -> 4. **Ethics/Clearances:4.1** Please check all those that apply. Is required.

Marine Institute Application for Research Funding -> 5. **Scope:5.1** NOTE: Approvers within the Principal Investigator's Centre/Unit will automatically be notified upon submission of this application form. Depending on the nature, scope, client/funding agency and institutional resource commitment, additional signing authorities may also be required. The Principal Investigator is required to complete a Proposal Transmittal Form with signatures from all required personnel as outlined in MI ISO Procedure MI003 (Proposal and Contract Development) to confirm and provide evidence of their approval of the proposal's readiness for submission. Once complete, this form must be uploaded to the "Attachments" tab in order to complete the application. Is required.

Marine Institute Application for Research Funding -> 6. **Check-list:6.1** Check all those that apply. is required.

Marine Institute Application for Research Funding -> 7. **Declaration:7.15** If you have any concerns about your ability to comply with any of the above, contact the head of your academic unit. Checking the box below confirms that you will comply with the above statements. 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.



	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>	
View Edit Clone Delete	Ref No : 7072	Test Application	Dr. Bob Test (Faculty of Science/Department of Biology)	Marine Institute Application for Research Funding (Awards/Awards)	Project Status: Pending Workflow Status: Pre-Submission Last Saved: 2017/12/05	

Application Options

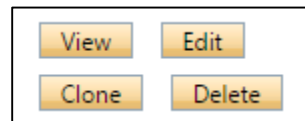
The options for an application include:

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

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

Clone: To clone your application. This will allow you *to start a new application of the same type* with the same information from a previous application.

Delete: To delete the application from the Researcher Portal.

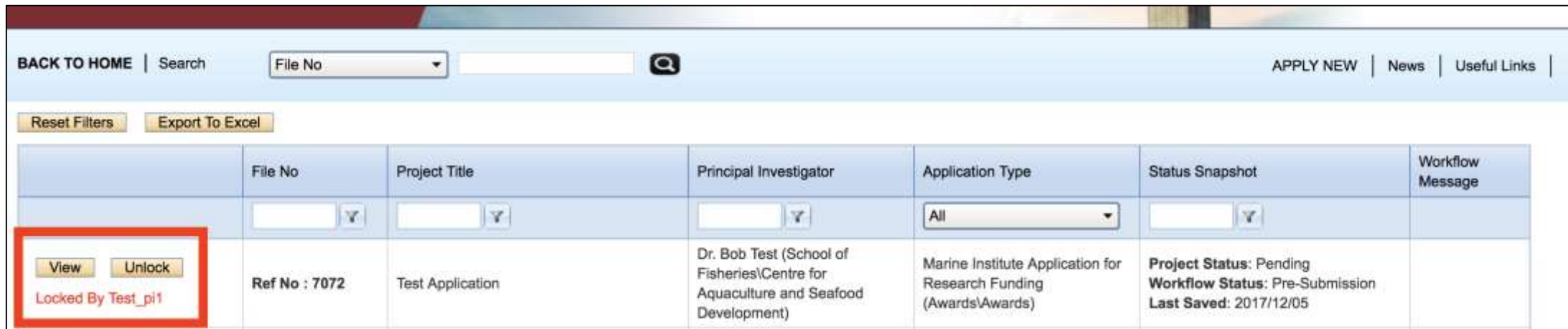


Locked File

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.***



	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
View Unlock Locked By Test_pi1	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>	
	Ref No : 7072	Test Application	Dr. Bob Test (School of Fisheries\Centre for Aquaculture and Seafood Development)	Marine Institute Application for Research Funding (Awards\Awards)	Project Status: Pending Workflow Status: Pre-Submission Last Saved: 2017/12/05	

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. **Once submitted, you can no longer edit the application.**



The screenshot shows the top of the application submission page. At the top left, it says "Application Ref No: 7072". Below this is a row of buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". The "Submit" button is highlighted with a red square. Below the buttons are four tabs: "Project Info", "Project Team Info", "Project Sponsor Info", and "Marine Institute A". The "Project Info" tab is active, showing a "Title *" field with the text "Test Application".

A workflow action block will appear. Here, you may make any necessary comments about your application (e.g., "Please review"). Click **Submit**.



The screenshot shows a "Work Flow Action" dialog box. It has a "Comments:" label above a large text input area. At the top right of the dialog are "Submit" and "Cancel" buttons. The "Submit" button is highlighted with a red square. At the bottom of the dialog are another "Submit" and "Cancel" buttons.

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

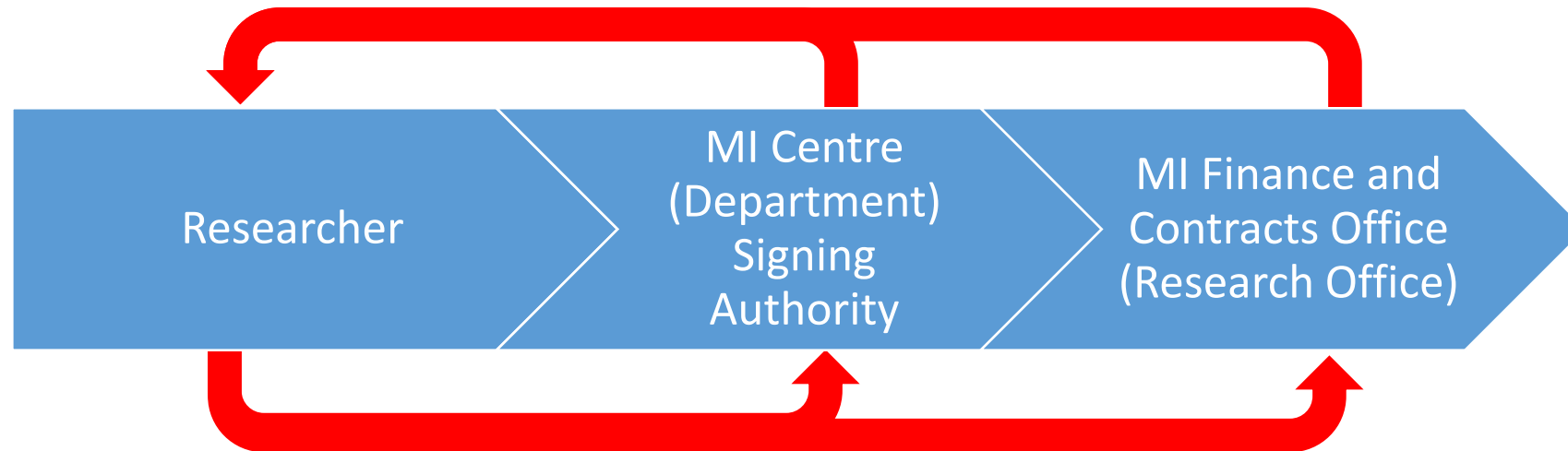
Most research funding applications must travel through Signing Authorities before being received by the appropriate research office.

Researchers must factor the time that will be needed for Signing Authorities to review and approve applications into their timelines for submitting applications.

Researchers already have to factor in collecting approver signatures in their current timelines for submitting applications, but it is important to emphasize this consideration as research funding applications are submitted through the Researcher Portal.

Signing Authorities Cont'd

Signing Authorities can approve applications or push them back to the Principal Investigator and project team for revisions.



If the application is pushed back for revisions, it will appear under the Applications: Requiring Attention link. **When the application is resubmitted, it will return to the Signing Authority who pushed it back so that they can continue their review.**

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 your project status and where your application is in the workflow.



Memorial
Researcher Portal

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

	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
<input type="button" value="View"/> <input type="button" value="Clone"/>	<input type="text"/> <input type="button" value="Y"/>	<input type="text"/> <input type="button" value="Y"/>	<input type="text"/> <input type="button" value="Y"/>	All <input type="button" value="Y"/>	<input type="text"/> <input type="button" value="Y"/>	
	Ref No : 7072	Test Application	Dr. Bob Test (School of Fisheries/Centre for Aquaculture and Seafood Development)	Marine Institute Application for Research Funding (Awards/Awards)	Project Status: Pending Workflow Status: Department Signing Authority Review	Please review [Action: Submit]

Withdrawing an Application

If the application is still with Signing Authorities, you may withdraw the application from consideration.

To withdraw an application:

- Click on Applications: Under Review
- View the specific application
- Click Withdraw (this button replaces Submit)

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.

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 associated with pushing back the application, 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**.



Application Ref No: 6946 Project Title: Test Application Application Form: Application for Research Funding
Project Work Flow State: Pending Info by Department

Save Close Print Export to Word Export to PDF **Re-Submit** Withdraw

Project Info Project Team Info Project Sponsor Info Application for Research Funding Attachments Approvals **Logs**

Application Workflow Log Application Log

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
31/10/2017 12:23	Project Work Flow State has been changed from Department Signing Authority Review to Pending Info by Department	Department Signing Authority Review -> Pending Info by Department	Please see the email on October 31, 2017 regarding modifications. [Action: Request Information]	Bob Smith	Department Signing Authority
31/10/2017 12:20	Project Work Flow State has been changed from Pending Info by Department to Department Signing Authority Review	Pending Info by Department -> Department Signing Authority Review	Please review [Action: Submit]	John Doe	Principal Investigator

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

What's Next?

Research funding applications will remain in **Applications: Under Review** until a funding decision has been made *by the Sponsor/Agency*.

Once the application has been approved by the Sponsor/Agency, the application can no longer be modified but is available for viewing under **Applications: Post Review** on the Researcher Portal homepage.

Any Post-Review activities, such as a request for transfers out, an amendment, or a project team change, can be submitted for a research funding file using Event forms. More information on Event forms can be found in additional training materials.

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/>