



# Researcher User Manual

Creating a New *Research Funding* Application for RIS 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:

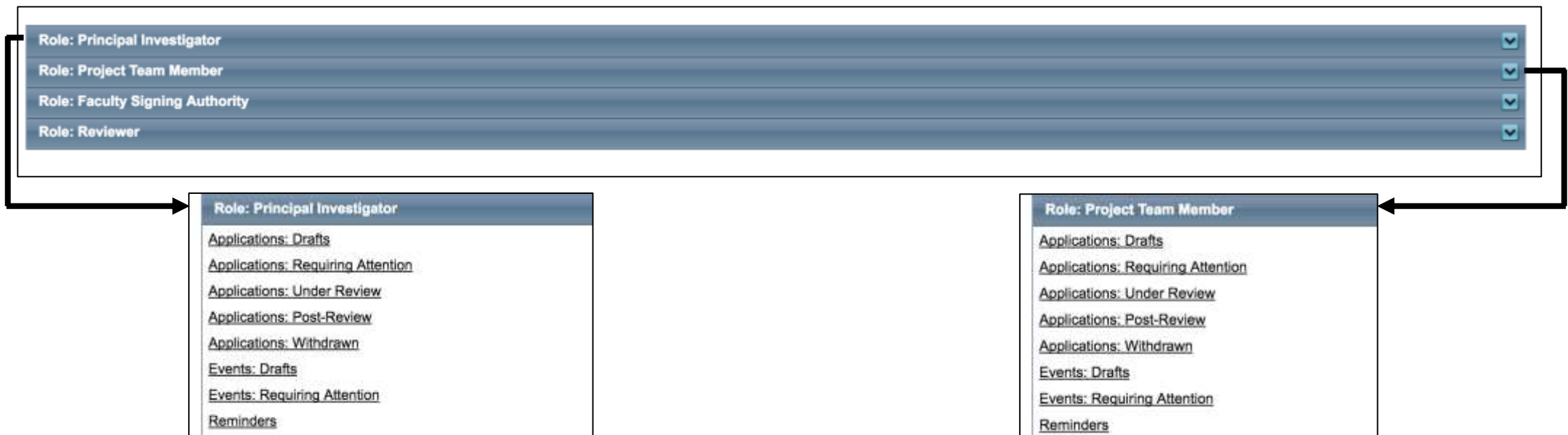
- Canada Foundation for Innovation (coordinated by CCCS)
- Canada Research Chairs (coordinated by CCCS)
- School of Graduate Studies fellowships and scholarships (coordinated by SGS)
- Undergraduate Student Research Awards (USRA)

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) 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 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 Contract 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

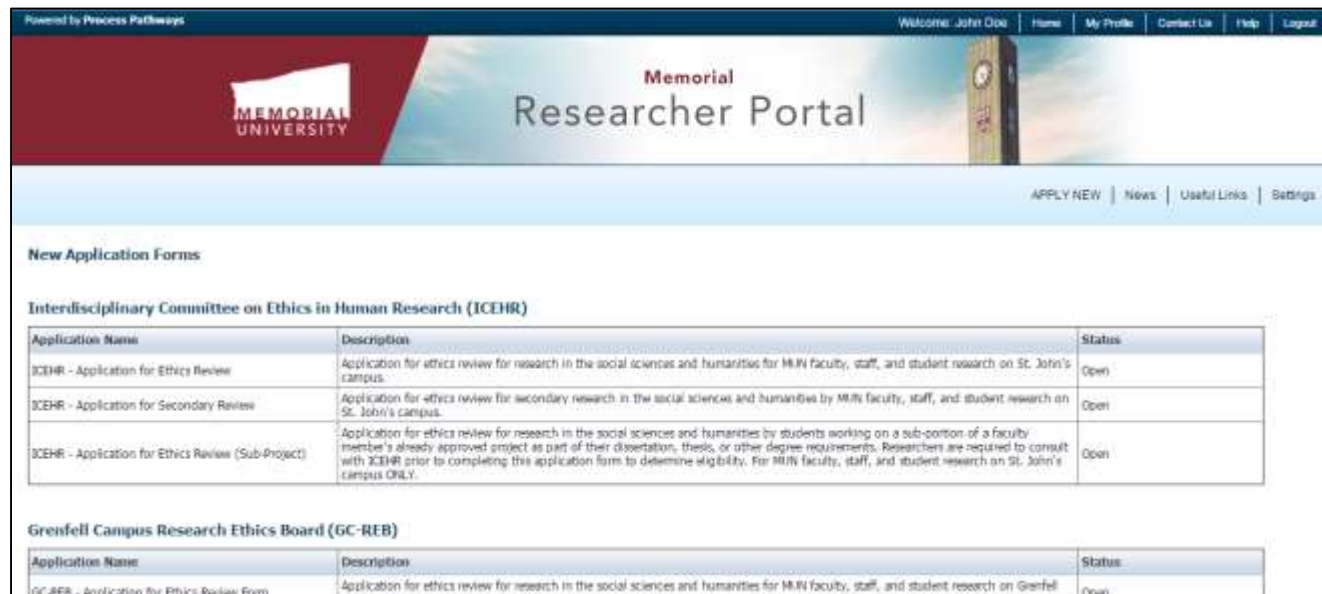
Click the **APPLY NEW** button in the Middle Navigation Menu on the Memorial Researcher Portal Home Page.



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.**



The screenshot shows the Memorial Researcher Portal interface. At the top, there is a navigation bar with the Memorial University logo and the text "Memorial Researcher Portal". Below this, there is a section titled "New Application Forms". Underneath, there are two sections: "Interdisciplinary Committee on Ethics in Human Research (ICEHR)" and "Grenfell Campus Research Ethics Board (GC-REB)". Each section contains a table of application forms.

Application Name	Description	Status
<a href="#">ICEHR - Application for Ethics Review</a>	Application for ethics review for research in the social sciences and humanities for MUN faculty, staff, and student research on St. John's campus.	Open
<a href="#">ICEHR - Application for Secondary Review</a>	Application for ethics review for secondary research in the social sciences and humanities by MUN faculty, staff, and student research on St. John's campus.	Open
<a href="#">ICEHR - Application for Ethics Review (Sub-Project)</a>	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 MUN faculty, staff, and student research on St. John's campus ONLY.	Open

Application Name	Description	Status
<a href="#">GC-REB - Application for Ethics Review Form</a>	Application for ethics review for research in the social sciences and humanities for MUN faculty, staff, and student research on Grenfell	Open

# 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 shows the top section of an application form. At the top, it displays 'Application Ref No: 6946', 'Project Title: Test Application', and 'Application Form: Application for Research Funding'. Below this, it shows 'Project Work Flow State: Pre-Submission'. A red rectangular box highlights a row of six buttons: 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. Below the buttons is a horizontal menu with tabs: 'Project Info', 'Project Team Info', 'Project Sponsor Info', 'Application for Research Funding', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Application for Research Funding' tab is active. Below the menu, 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.

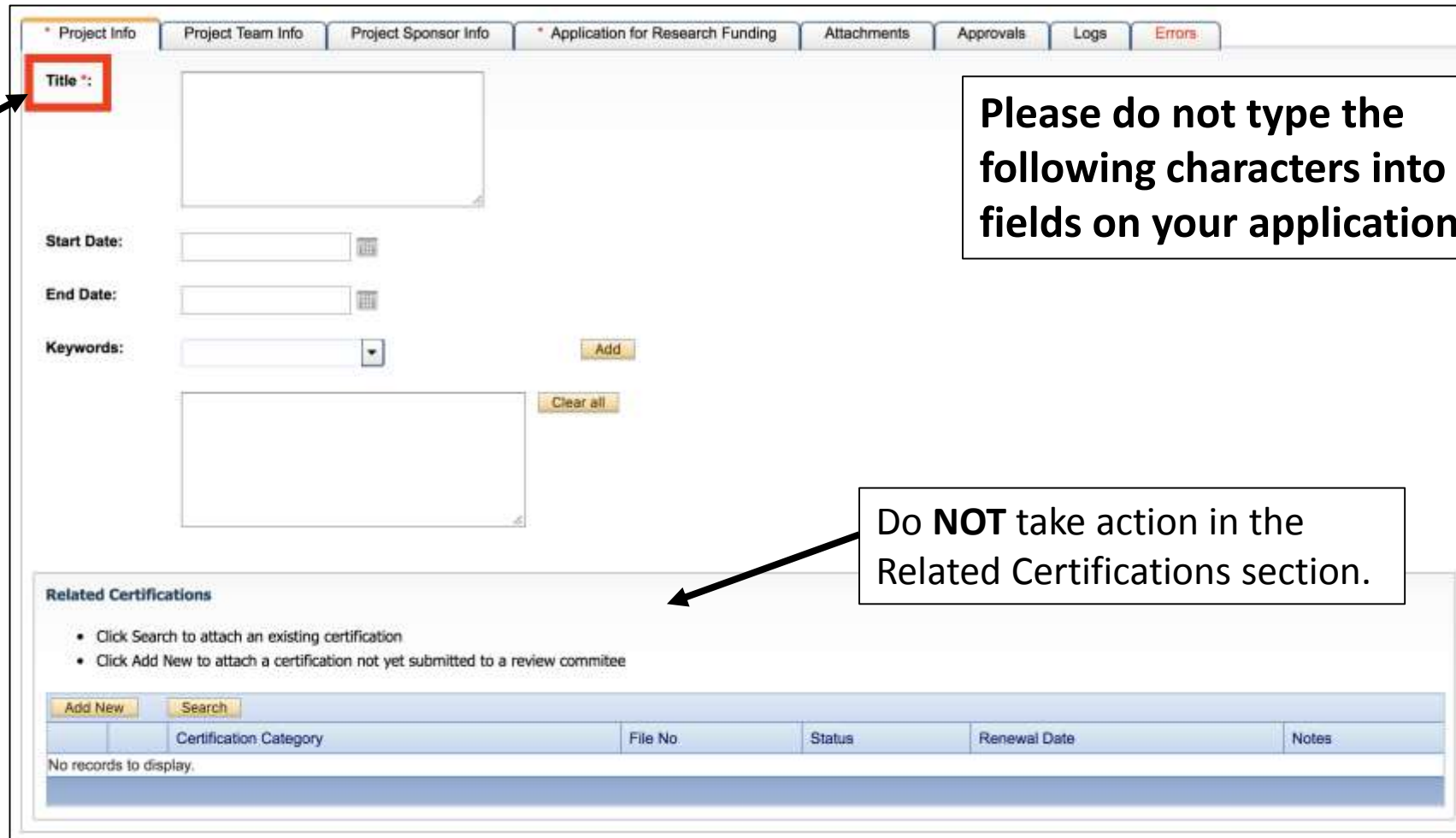
NOTE: Click **Save** as often as possible while completing your application!



The screenshot shows the top section of an application interface. At the top, it displays 'Application Ref No: 6946', 'Project Title: Test Application', and 'Application Form: Application for Research Funding'. Below this, it shows 'Project Work Flow State: Pre-Submission'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. A red rectangular box highlights a row of tabs: 'Project Info', '\* Project Team Info', 'Project Sponsor Info', '\* Application for Research Funding', 'Attachments', 'Approvals', 'Logs', and 'Errors'. Below the tabs, a form field is visible with the label 'Title \*:' and the value 'Test Application'.

# Project Info Tab

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



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

**Title \***

Start Date:

End Date:

Keywords:

**Related Certifications**

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Certification Category	File No	Status	Renewal Date	Notes
No records to display.				

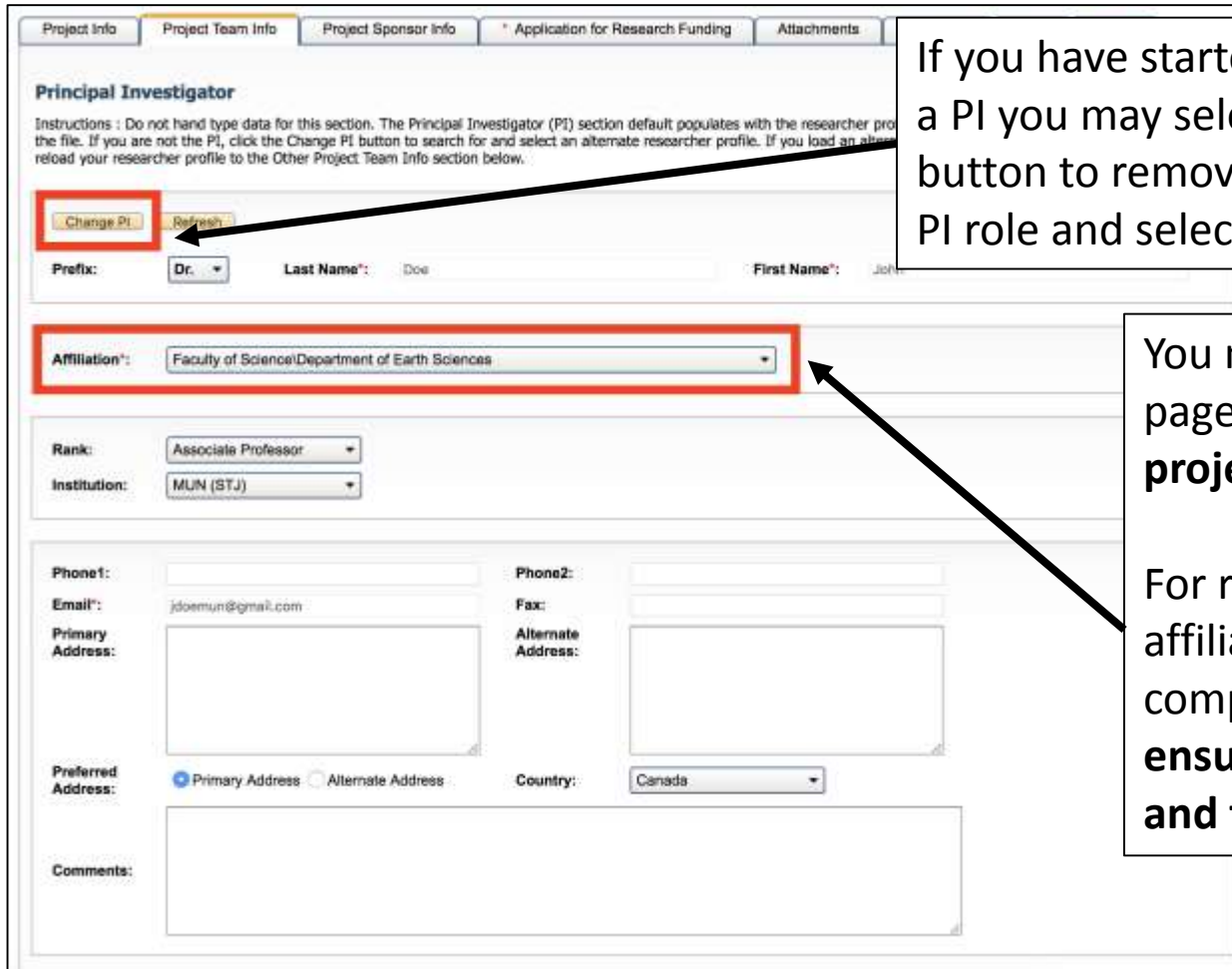
**IMPORTANT:** Please note that all fields that have a red asterisk \* are required. Failing to complete these fields will prevent the PI from submitting the application. See [Errors Tab](#) for more information.

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.



Project Info | Project Team Info | Project Sponsor Info | 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. 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 Other Project Team Info section below.

**Change PI** Refresh

Prefix:  Last Name\*:  First Name\*:

**Affiliation\***:

Rank:

Institution:

Phone1:  Phone2:

Email\*:  Fax:

Primary Address:  Alternate Address:

Preferred Address:  Primary Address  Alternate Address Country:

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 departmental and faculty approvers.**

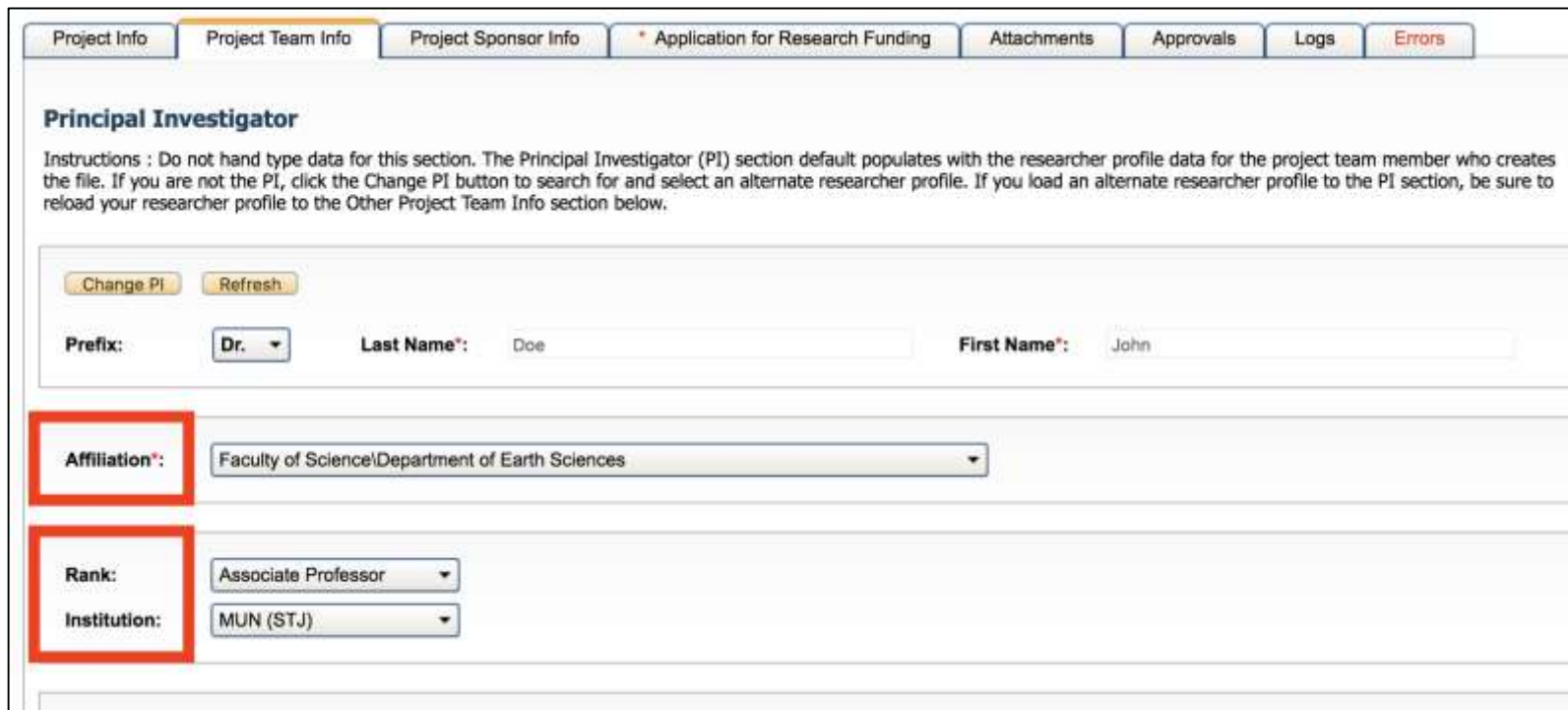
# Researchers with Multiple Affiliations

- 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

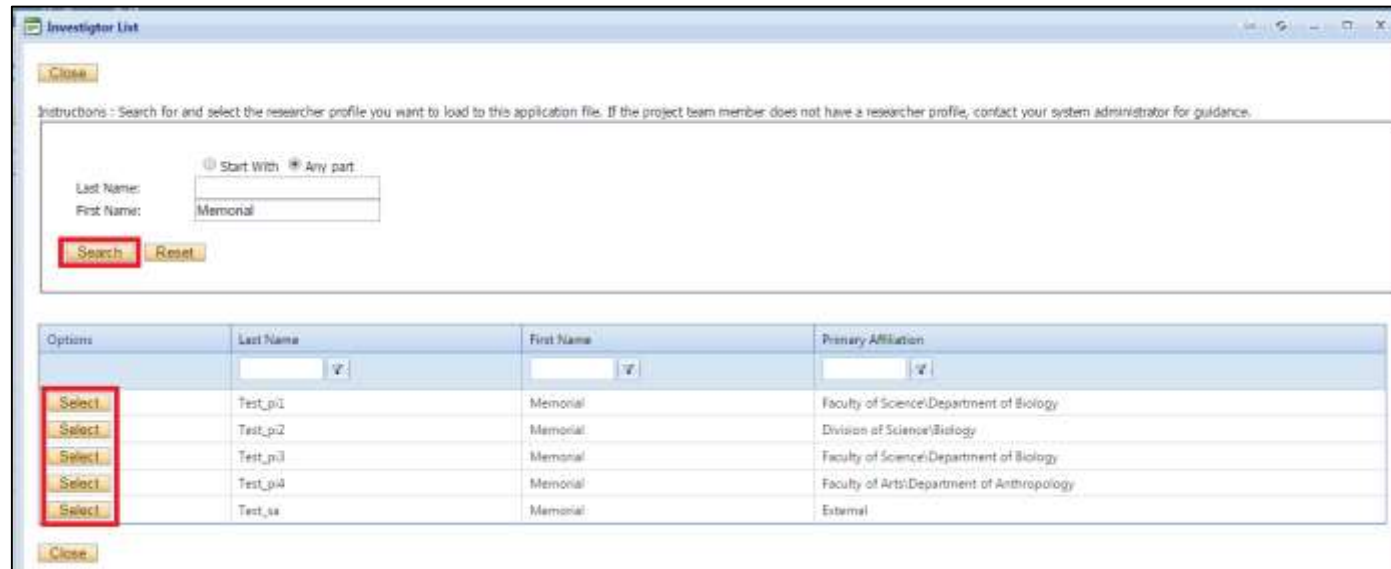
Depending on the research and affiliation, a researcher's rank and institution may change. You may change the rank and institution for the application by selecting the drop down menus on the Project Team Info Tab.



The screenshot shows a web application interface with several tabs: Project Info, Project Team Info (selected), Project Sponsor Info, Application for Research Funding, Attachments, Approvals, Logs, and Errors. The main content area is titled "Principal Investigator" and includes instructions: "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." Below the instructions are two buttons: "Change PI" and "Refresh". The form fields are: "Prefix:" with a dropdown menu set to "Dr.", "Last Name\*:" with the text "Doe", and "First Name\*:" with the text "John". Below these are three fields highlighted with red boxes: "Affiliation\*:" with a dropdown menu showing "Faculty of Science\Department of Earth Sciences", "Rank:" with a dropdown menu set to "Associate Professor", and "Institution:" with a dropdown menu set to "MUN (STJ)".

# 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 the following data:

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

At the bottom of the window, there is a "Close" button.

*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

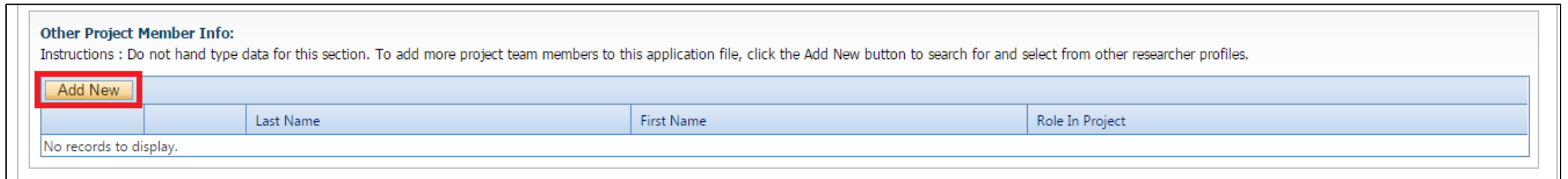
You are required to list all project team members in the Project Team Info tab.

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.

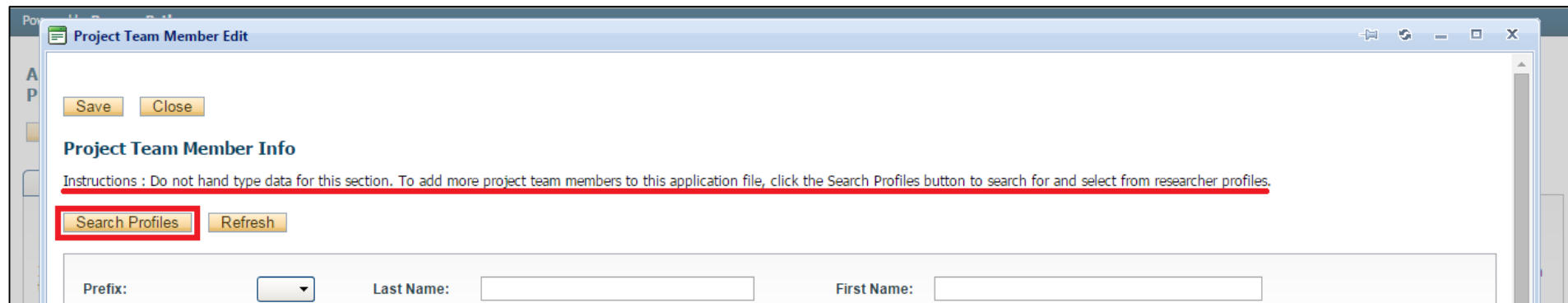


**Other Project Member Info:**  
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

**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

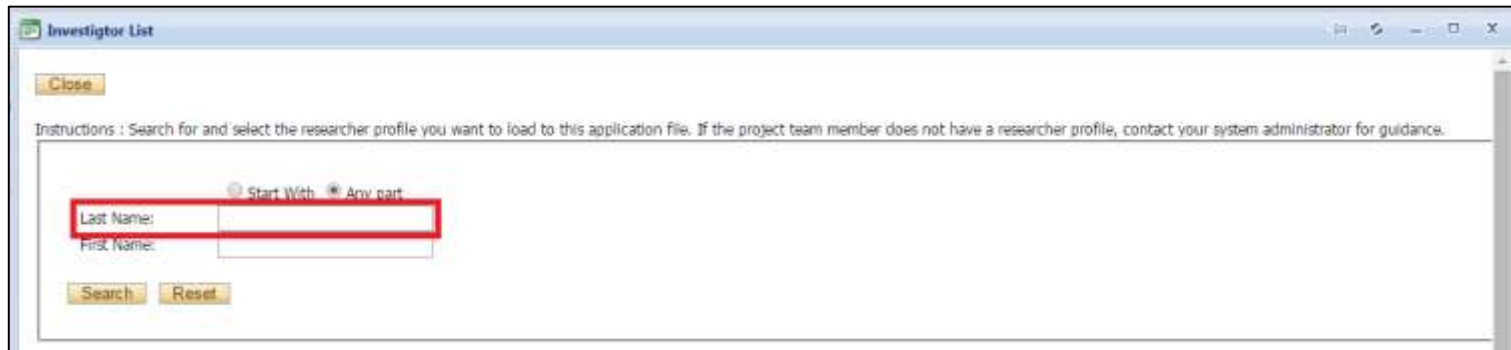
**Project Team Member Info**  
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles.

**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 "Search" and "Reset" buttons.

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

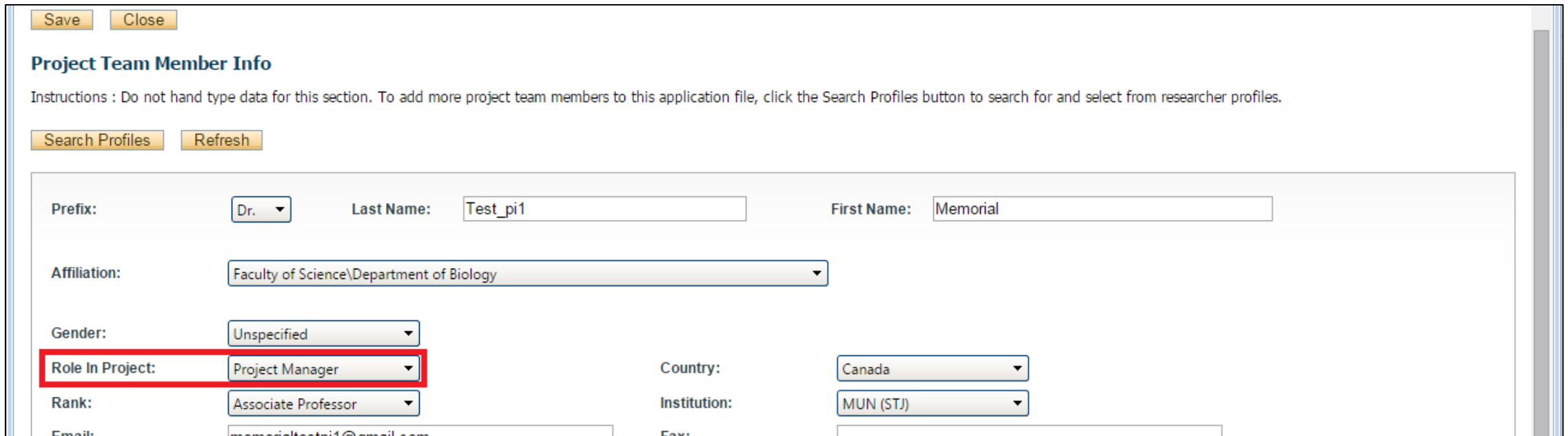


This screenshot shows the same "Investigator List" window after a search. The "Last Name:" field now contains "test\_pi1". Below the search fields is a table with search results. The "Select" button in the first row is highlighted with a red rectangle.

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.**

# Required Project Team Members

## Other Project Team Members for Research Funding Applications:

Research funding applications **require** additional team members. They will help to ensure the application is appropriately processed.

- **Your unit's Grant Facilitator**, if applicable to your unit
- **The RIS Workflow Coordinator**

Add these team members in the initial stage of your application to ensure that they are able to assist in the processing of your application. **These individuals 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 your unit's Grant Facilitator:**

Follow the same process to add a Project Team Member.

Search for the appropriate individual in the Investigator List window:

- Go to this webpage – <http://www.mun.ca/research/funding/grants/facilitators.php> – for a list of Grant Facilitators by unit.

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

## **Adding the RIS Workflow Coordinator:**

Follow the same process to add a Project Team Member.

Search for the RIS Workflow Coordinator in the Investigator List window:

- RIS Workflow Coordinator: Search for “RIS” in the Last Name field.

On the Project Team Member Info screen, choose “RIS – Workflow Coordinator” as 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.

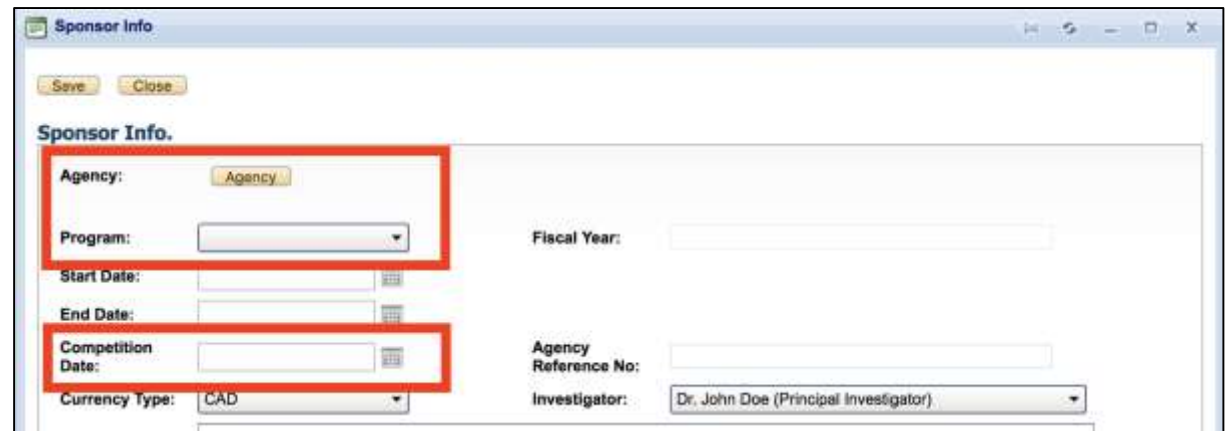
You may click **Add New** to add additional sponsors and programs after creating your first sponsor entry, if applicable.

# 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 RIS Workflow Coordinator ([RISworkflow@mun.ca](mailto:RISworkflow@mun.ca) or 709.864.3805) for assistance.



The screenshot shows a 'Sponsor Info' window with the following fields:

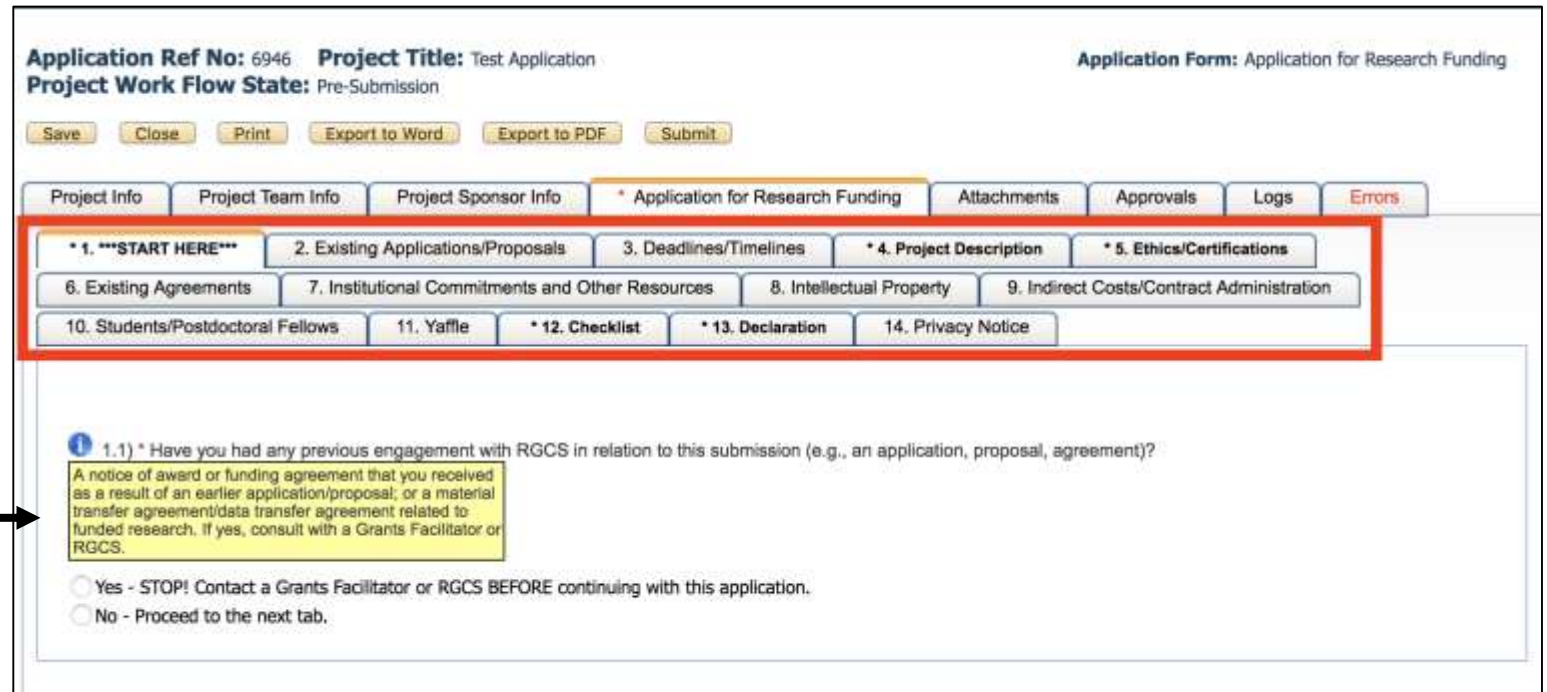
- Agency:** A dropdown menu with 'Agency' selected. This field is highlighted with a red box.
- Program:** A dropdown menu. This field is highlighted with a red box.
- Start Date:** A date input field.
- End Date:** A date input field.
- Competition Date:** A date input field. This field is highlighted with a red box.
- Fiscal Year:** A text input field.
- Agency Reference No.:** A text input field.
- Investigator:** A dropdown menu with 'Dr. John Doe (Principal Investigator)' selected.
- Currency Type:** A dropdown menu with 'CAD' 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: 6946 Project Title: Test Application Application Form: 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 \* Application for Research Funding Attachments Approvals Logs Errors

\* 1. \*\*START HERE\*\* 2. Existing Applications/Proposals 3. Deadlines/Timelines \* 4. Project Description \* 5. Ethics/Certifications  
6. Existing Agreements 7. Institutional Commitments and Other Resources 8. Intellectual Property 9. Indirect Costs/Contract Administration  
10. Students/Postdoctoral Fellows 11. Yaffle \* 12. Checklist \* 13. Declaration 14. Privacy Notice

1.1) \* Have you had any previous engagement with RGCS in relation to this submission (e.g., an application, proposal, agreement)?

A notice of award or funding agreement that you received as a result of an earlier application/proposal; or a material transfer agreement/data transfer agreement related to funded research. If yes, consult with a Grants Facilitator or RGCS.

Yes - STOP! Contact a Grants Facilitator or RGCS BEFORE continuing with this application.  
 No - Proceed to the next tab.

# 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 (\*).

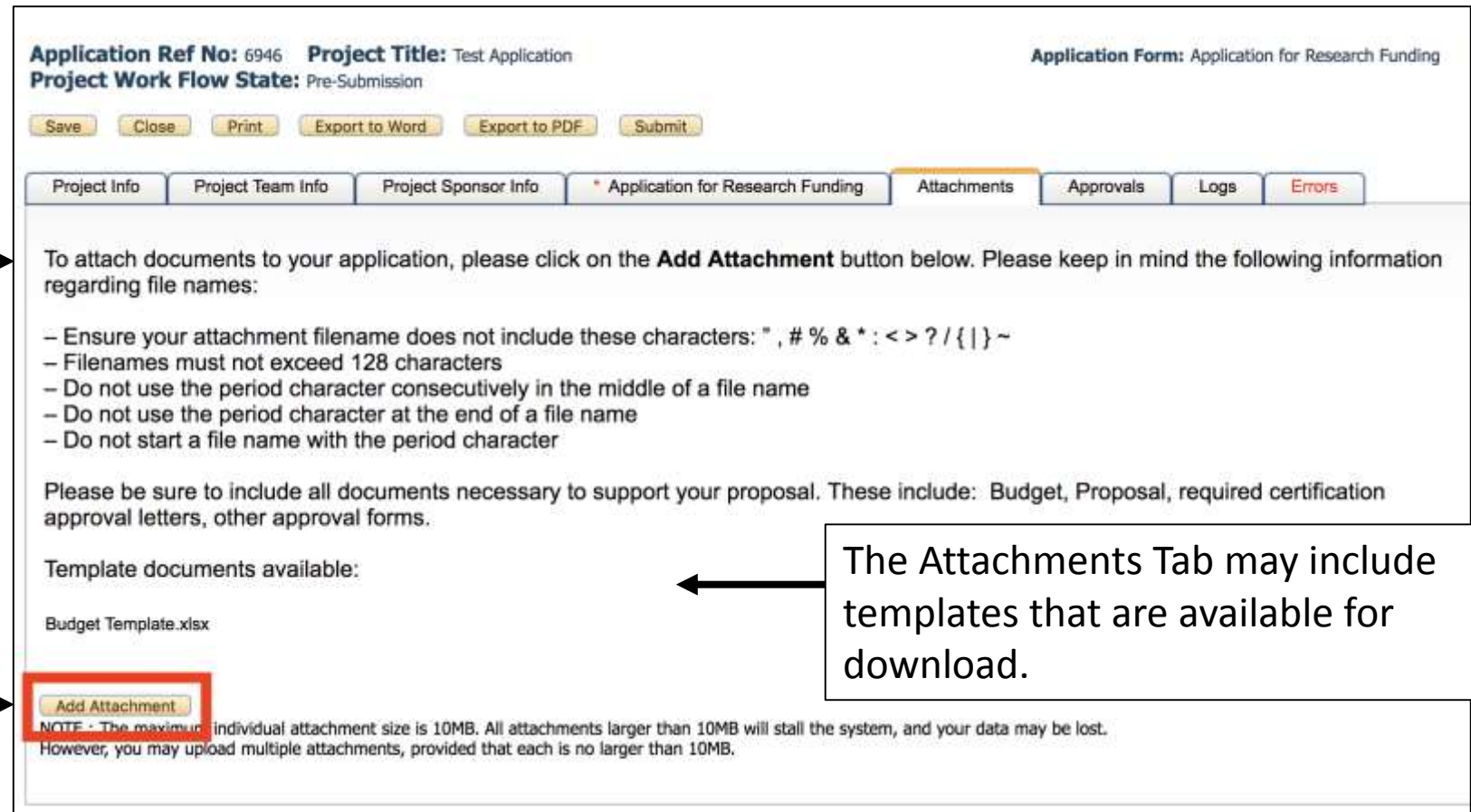
Once all the required questions on the tab have been completed, the tab's name no longer appears bolded, and the asterisk next to its name disappears.

# 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.



The screenshot shows the 'Attachments' tab of an application form. At the top, it displays 'Application Ref No: 6946', 'Project Title: Test Application', and 'Project Work Flow State: Pre-Submission'. Below this are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. A navigation bar includes tabs for 'Project Info', 'Project Team Info', 'Project Sponsor Info', 'Application for Research Funding', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The main content area contains instructions: 'To attach documents to your application, please click on the **Add Attachment** button below. Please keep in mind the following information regarding file names:'. A list of instructions follows: '- 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', and '- Do not start a file name with the period character'. Below this, it states: 'Please be sure to include all documents necessary to support your proposal. These include: Budget, Proposal, required certification approval letters, other approval forms.' A section titled 'Template documents available:' lists 'Budget Template.xlsx'. At the bottom, there is a red-bordered 'Add Attachment' button and a note: '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.

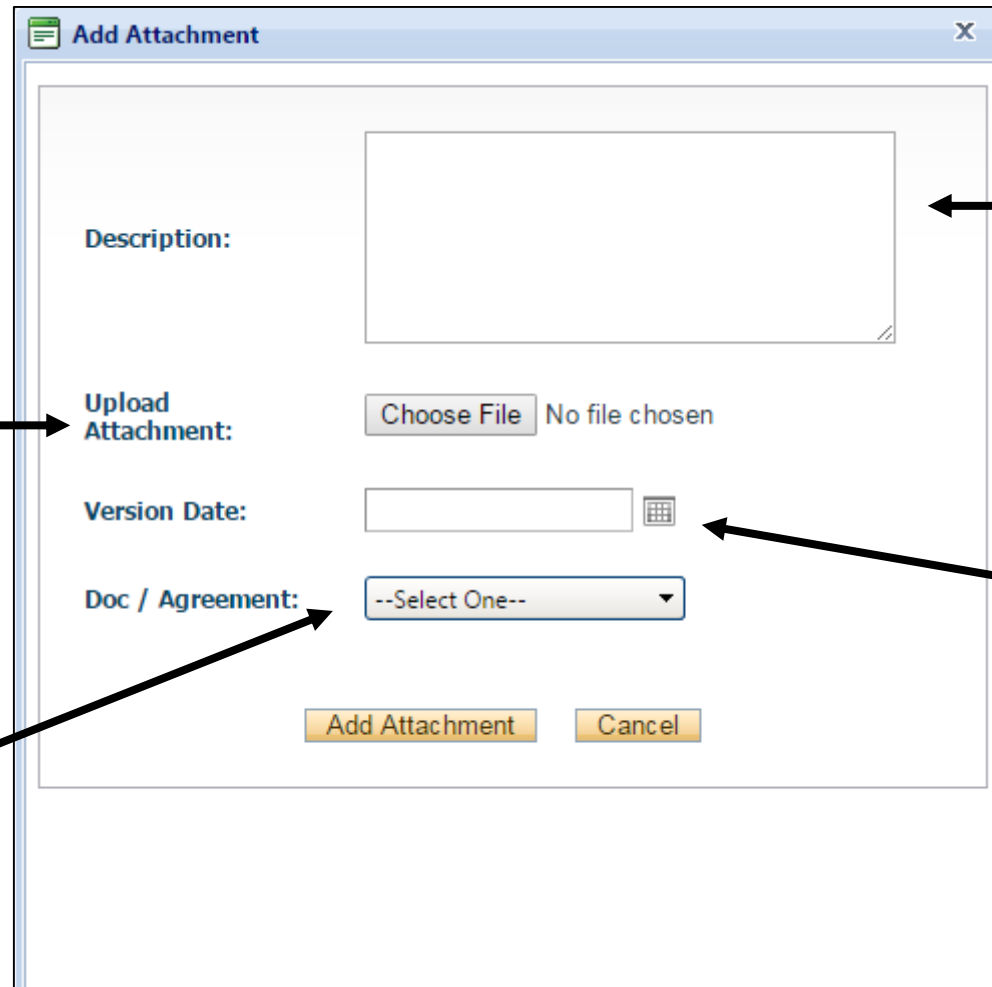
**Please note: The maximum file size is 10 MB. While users can attach as many files as necessary, no single file can exceed 10 MB.**

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).

**Signing Authorities are determined by the PI's affiliation on the Project Team Info tab.**

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



Application Ref No: 6946 Project Title: Test Application Application Form: 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 \* Application for Research Funding 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 checked="" type="checkbox"/>	
Faculty Signing Authority	<input checked="" type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

# Logs Tab

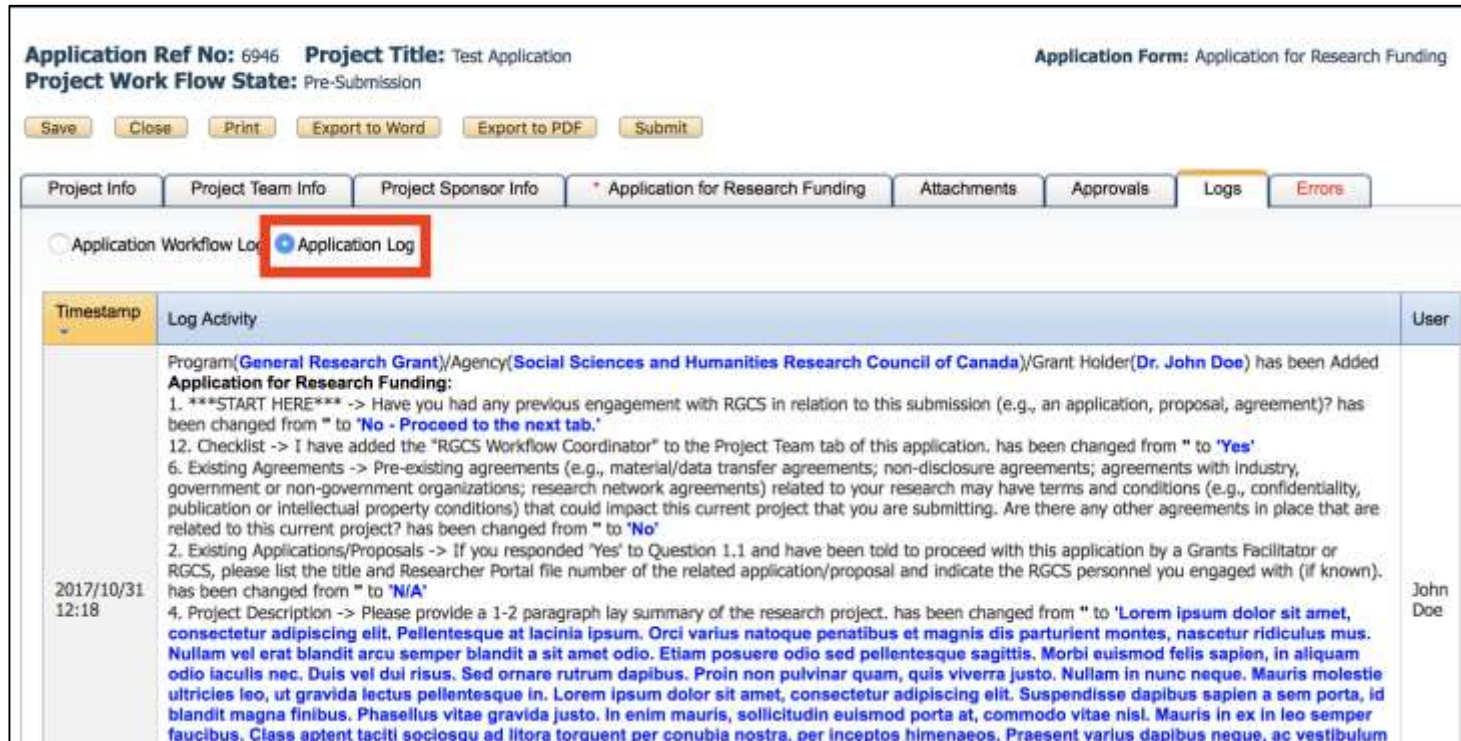
The Log Tab allows the PI and Project Team Members to view all actions on a file. Under the Workflow Log you can track the history of the application. It tracks and time stamps approvals and messages at all stages of the application's workflow.



The screenshot shows a web interface for an application. At the top, it displays: **Application Ref No:** 6946, **Project Title:** Test Application, and **Application Form:** Application for Research Funding. Below this, it shows **Project Work Flow State:** Pre-Submission. There are several buttons: 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, Application for Research Funding (active), Attachments, Approvals, Logs (highlighted), and Errors. Under the Logs tab, there are two radio buttons:  Application Workflow Log and  Application Log. 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.

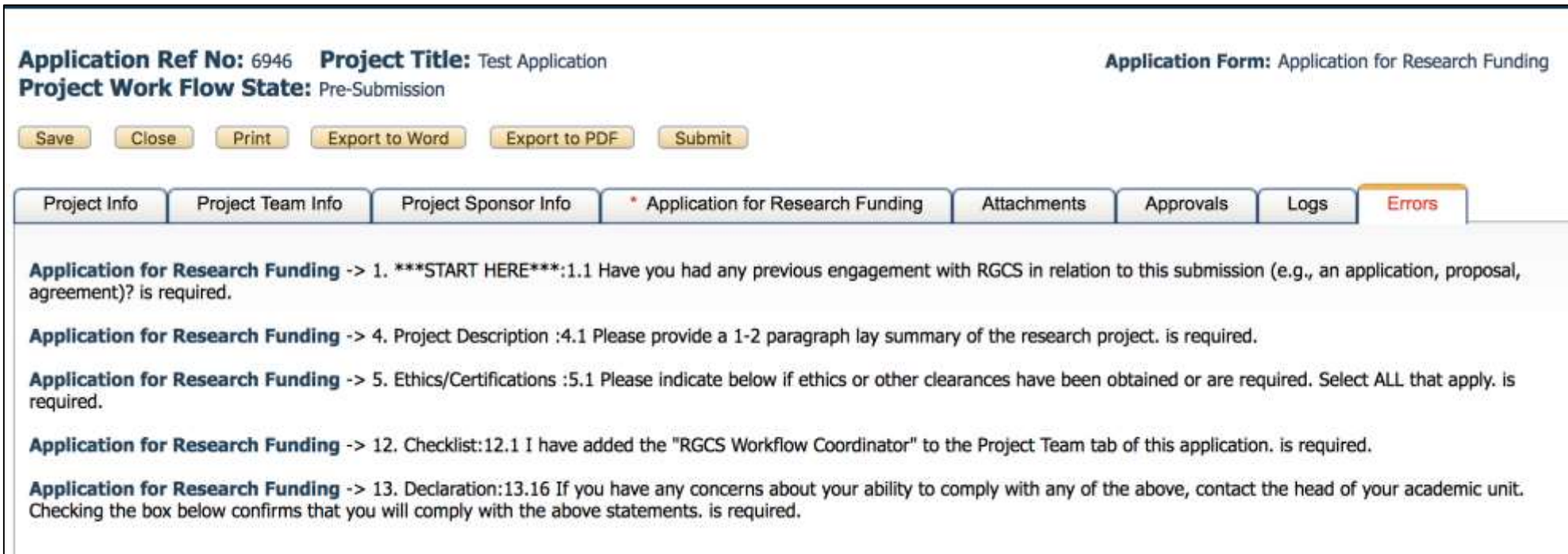


The screenshot displays the 'Application Log' tab within a web application interface. At the top, it shows 'Application Ref No: 6946', 'Project Title: Test Application', and 'Application Form: Application for Research Funding'. Below this, there are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. A navigation bar includes tabs for 'Project Info', 'Project Team Info', 'Project Sponsor Info', 'Application for Research Funding', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Logs' tab is active, and the 'Application Log' radio button is selected. The log entry table has columns for 'Timestamp', 'Log Activity', and 'User'. The entry shows a timestamp of '2017/10/31 12:18' and a user named 'John Doe'. The log activity text describes changes to the application, including adding the application, updating a checklist item, and changing existing agreements.

Timestamp	Log Activity	User
2017/10/31 12:18	Program( <b>General Research Grant</b> )/Agency( <b>Social Sciences and Humanities Research Council of Canada</b> )/Grant Holder( <b>Dr. John Doe</b> ) has been Added <b>Application for Research Funding:</b> 1. <b>***START HERE***</b> -> Have you had any previous engagement with RGCS in relation to this submission (e.g., an application, proposal, agreement)? has been changed from "" to <b>'No - Proceed to the next tab.'</b> 12. Checklist -> I have added the "RGCS Workflow Coordinator" to the Project Team tab of this application. has been changed from "" to <b>'Yes'</b> 6. Existing Agreements -> Pre-existing agreements (e.g., material/data transfer agreements; non-disclosure agreements; agreements with industry, government or non-government organizations; research network agreements) related to your research may have terms and conditions (e.g., confidentiality, publication or intellectual property conditions) that could impact this current project that you are submitting. Are there any other agreements in place that are related to this current project? has been changed from "" to <b>'No'</b> 2. Existing Applications/Proposals -> If you responded 'Yes' to Question 1.1 and have been told to proceed with this application by a Grants Facilitator or RGCS, please list the title and Researcher Portal file number of the related application/proposal and indicate the RGCS personnel you engaged with (if known). has been changed from "" to <b>'N/A'</b> 4. Project Description -> Please provide a 1-2 paragraph lay summary of the research project. has been changed from "" to <b>'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque at lacinia ipsum. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nullam vel erat blandit arcu semper blandit a sit amet odio. Etiam posuere odio sed pellentesque sagittis. Morbi euismod felis sapien, in aliquam odio iaculis nec. Duis vel dui risus. Sed ornare rutrum dapibus. Proin non pulvinar quam, quis viverra justo. Nullam in nunc neque. Mauris molestie ultricies leo, ut gravida lectus pellentesque in. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Suspendisse dapibus sapien a sem porta, id blandit magna finibus. Phasellus vitae gravida justo. In enim mauris, sollicitudin euismod porta at, commodo vitae nisi. Mauris in ex in leo semper faucibus. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Praesent varius dapibus neque, ac vestibulum</b>	John Doe

# 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.**



**Application Ref No:** 6946 **Project Title:** Test Application **Application Form:** 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 \* Application for Research Funding Attachments Approvals Logs **Errors**

**Application for Research Funding** -> 1. **\*\*\*START HERE\*\*\*:1.1** Have you had any previous engagement with RGCS in relation to this submission (e.g., an application, proposal, agreement)? is required.

**Application for Research Funding** -> 4. **Project Description :4.1** Please provide a 1-2 paragraph lay summary of the research project. is required.

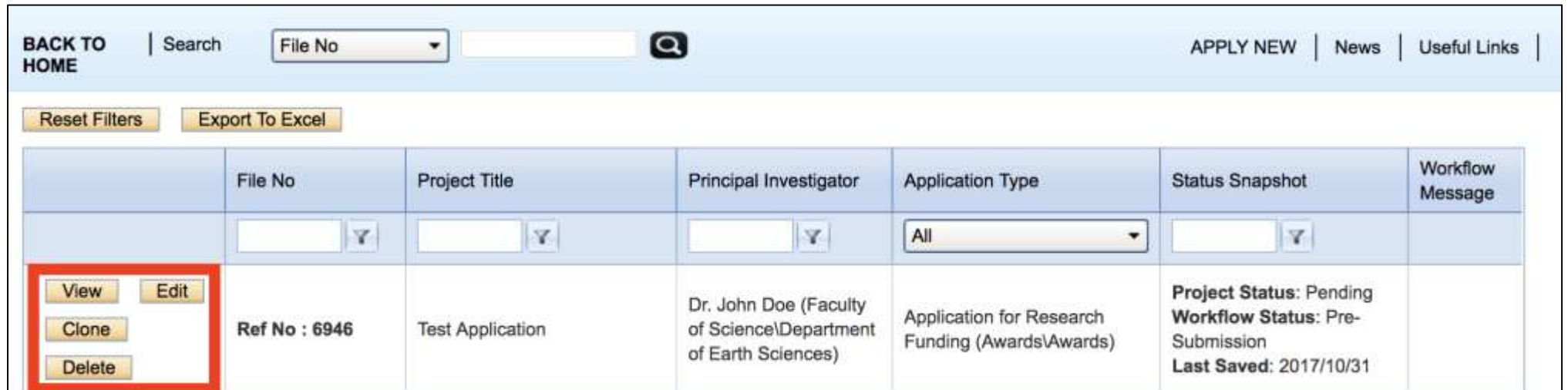
**Application for Research Funding** -> 5. **Ethics/Certifications :5.1** Please indicate below if ethics or other clearances have been obtained or are required. Select ALL that apply. is required.

**Application for Research Funding** -> 12. **Checklist:12.1** I have added the "RGCS Workflow Coordinator" to the Project Team tab of this application. is required.

**Application for Research Funding** -> 13. **Declaration:13.16** 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.



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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
	[ ] [Y]	[ ] [Y]	[ ] [Y]	All [v]	[ ] [Y]	
<b>View</b> <b>Edit</b> <b>Clone</b> <b>Delete</b>	Ref No : 6946	Test Application	Dr. John Doe (Faculty of Science\Department of Earth Sciences)	Application for Research Funding (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre-Submission <b>Last Saved:</b> 2017/10/31	

# Application Options

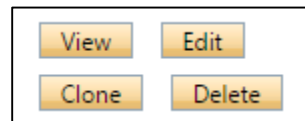
The options for an application include:

**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.

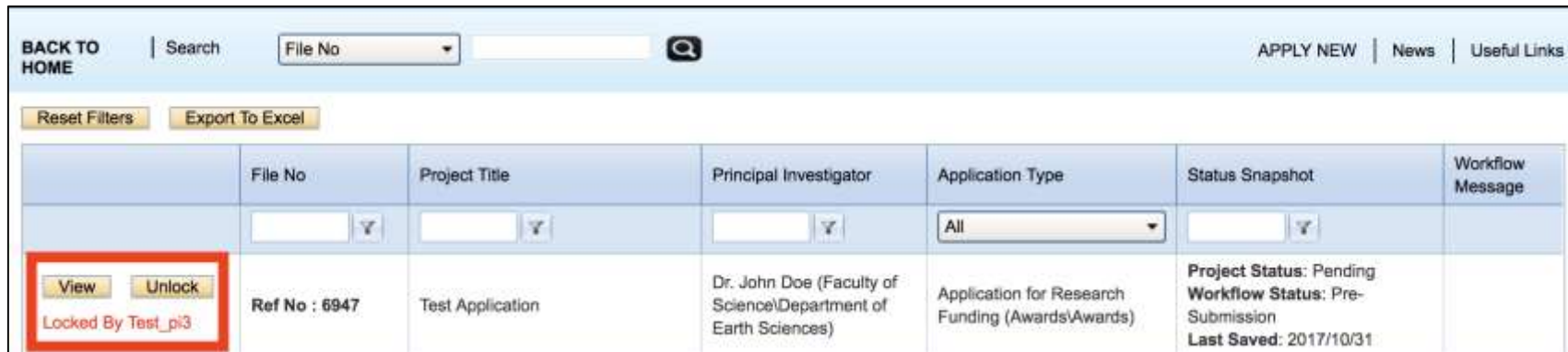


# Locked File

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.***



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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
				All		
<b>View</b> <b>Unlock</b> Locked By Test_pi3	Ref No : 6947	Test Application	Dr. John Doe (Faculty of Science\Department of Earth Sciences)	Application for Research Funding (Awards\Awards)	Project Status: Pending Workflow Status: Pre-Submission Last Saved: 2017/10/31	




# 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 displays 'Application Ref No: 6946' and 'Project Title: Test Application'. Below this, it shows 'Project Work Flow State: Pre-Submission'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The 'Submit' button is highlighted with a red rectangle. Below the buttons are several tabs: 'Project Info', '\* Project Team Info', 'Project Sponsor Info', and '\* Application for Re'. A 'Title \*:' field contains 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, there are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red rectangle. At the bottom of the dialog, there are also 'Submit' and 'Cancel' buttons.

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

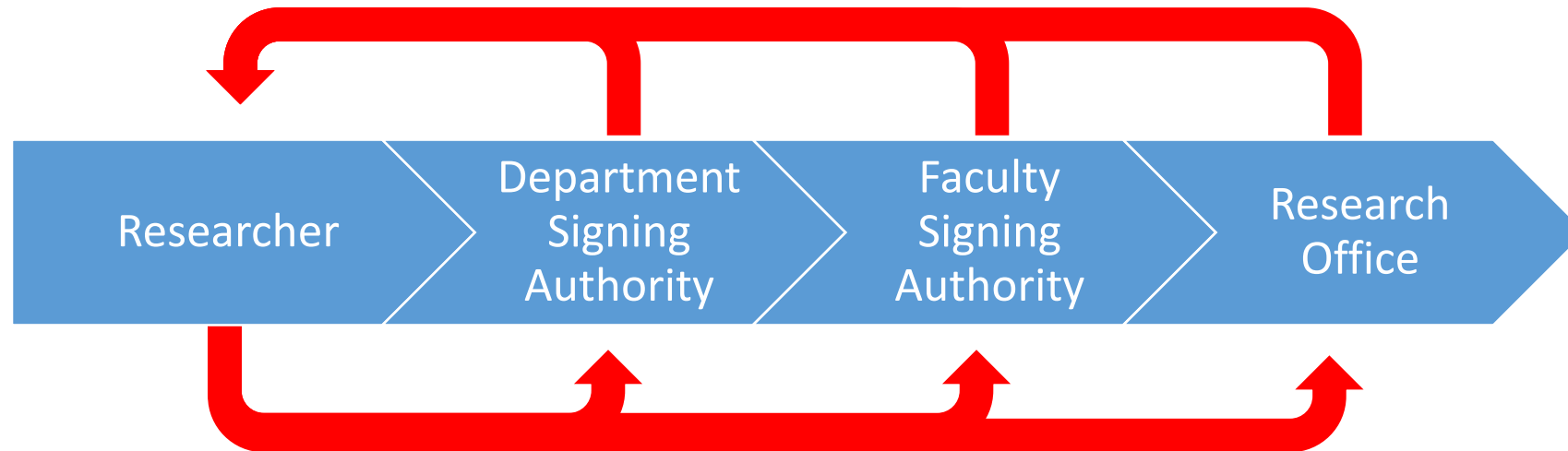
Most research funding applications must travel through Signing Authorities before being received by the appropriate research office.

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

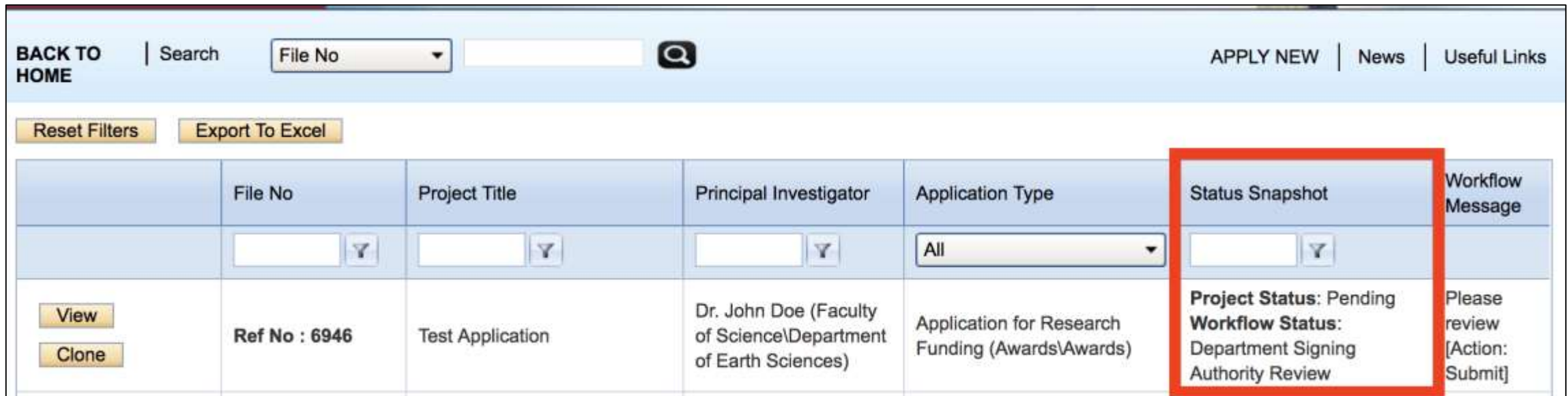
Signing Authorities can approve applications or push them back to the Principal Investigator and project team for revisions.



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.



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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
	[ ] [Y]	[ ] [Y]	[ ] [Y]	All [v]	[ ] [Y]	
<a href="#">View</a> <a href="#">Clone</a>	Ref No : 6946	Test Application	Dr. John Doe (Faculty of Science\Department of Earth Sciences)	Application for Research Funding (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> 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/>