



Memorial Research Tools & Resources



Researcher User Manual

Cloning Applications, Creating and Managing Events

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://rresources.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.

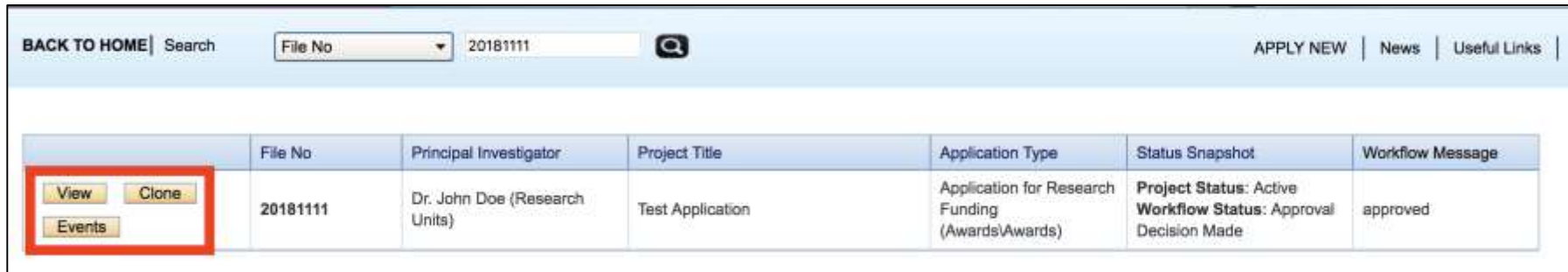
Managing Approved Applications

Once an application has been approved and is active, you will find it in in the **Applications: Post-Review** quick link on the *Home Page*. This link contains post-review ethics and awards applications. These applications are read-only; however, the Principal Investigator and Project Team Members can clone (copy) the application or submit Event forms for these files. **Please note: Applications that were entered by RIS prior to the implementation of the Memorial Researcher Portal (i.e., not submitted through the Researcher Portal) CANNOT be cloned.**



Viewing an Application Post-Review

Three actions can be performed on an application



	File No	Principal Investigator	Project Title	Application Type	Status Snapshot	Workflow Message
View Clone Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

1. View button: The view button allows a user to access the application in read-only mode. An application in view mode is shown below. You may still access the tabs of your application and print or export it to Word or PDF.



File No: 20181111 **Project Title:** Test Application **Project Work Flow State:** Approval Decision Made **Application Form:** Application for Research Funding

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

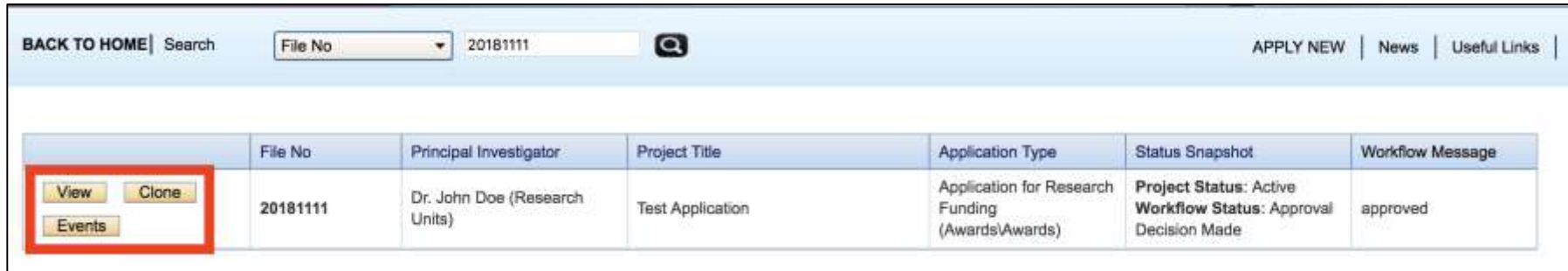
View mode. Changes cannot be saved.

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

Title *: Test Application

Cloning an Application Post-Review

Three actions can be performed on an application



BACK TO HOME | Search | File No: 20181111 | APPLY NEW | News | Useful Links

	File No	Principal Investigator	Project Title	Application Type	Status Snapshot	Workflow Message
View Clone Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

2. Clone button: Cloning allows you to start a new application by copying information from the tabs of an existing application. As seen in the screenshot on the right, you will be presented with the option of copying the Project Info, Project Team Info, Project Sponsor Info, Common Questions, and Attachments tabs from an existing application. **Applications created prior to the implementation of the Memorial Researcher Portal CANNOT be cloned.**



Application Form Clone

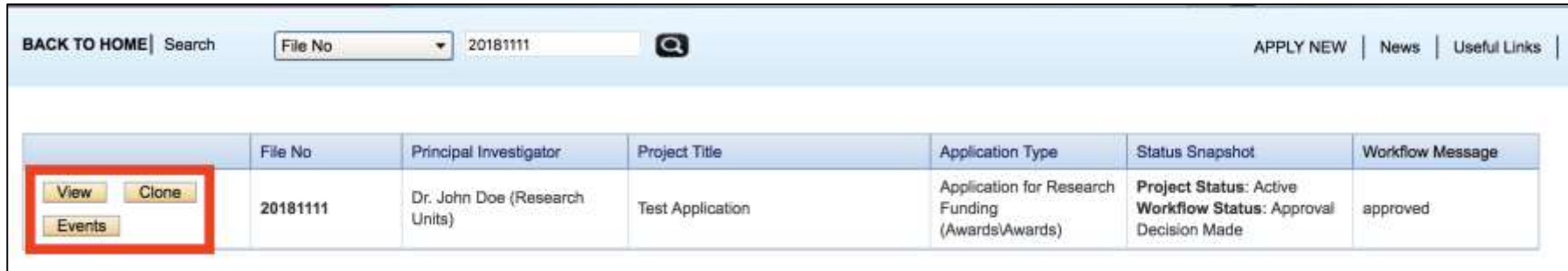
Please select below the tabs that you want to clone

- Project Info
- Project Team Info
- Project Sponsor Info
- Common Questions
- Attachments

Clone Cancel

Managing Events of an Application Post-Review

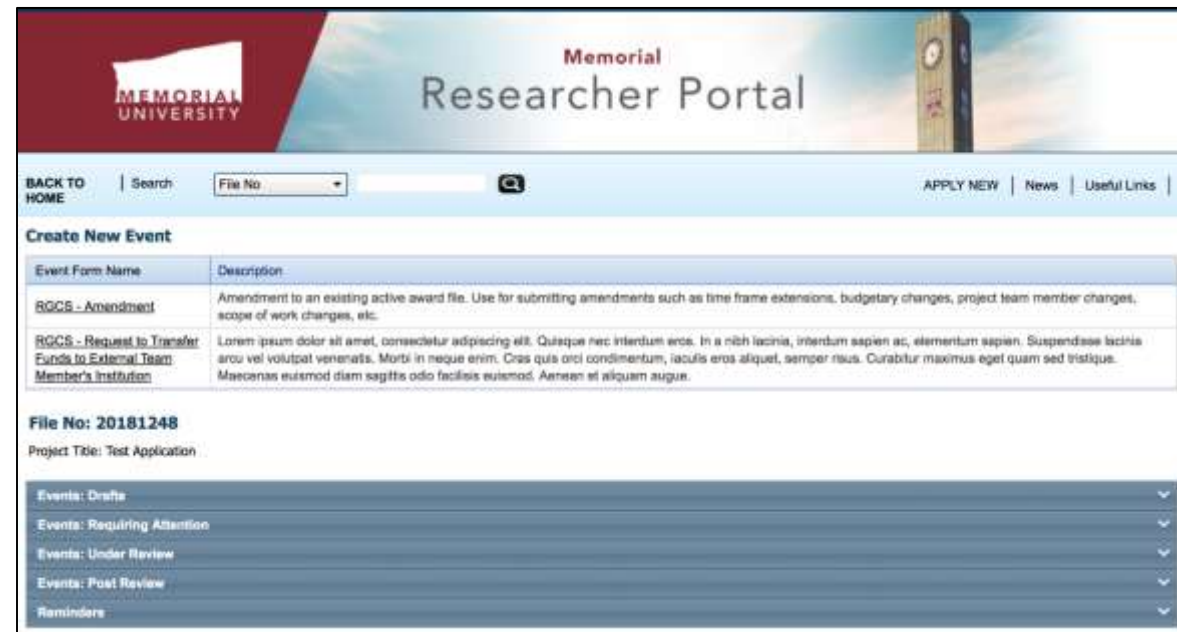
Three actions can be performed on an application



BACK TO HOME | Search | File No: 20181111 | APPLY NEW | News | Useful Links

	File No	Principal Investigator	Project Title	Application Type	Status Snapshot	Workflow Message
View Clone Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards/Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

3. Events button: Opens the Events page, as seen on the screenshot to the right. Here you can create and manage Event forms for an application. Event forms are designed to manage post-approval application forms such as personnel changes, amendments and various other forms.



Memorial Researcher Portal

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

Create New Event

Event Form Name	Description
RGCS - Amendment	Amendment to an existing active award file. Use for submitting amendments such as time frame extensions, budgetary changes, project team member changes, scope of work changes, etc.
RGCS - Request to Transfer Funds to External Team Member's Institution	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque nec interdum eros. In a nibh lacinia, interdum sapien ac, elementum sapien. Suspendisse lacinia orcu vel volutpat venenatis. Morbi in neque enim. Cras quis orci condimentum, iaculis eros aliquet, semper neus. Curabitur maximus eget quam sed tristique. Maecenas eusmod diam sagittis odio facilisis euismod. Aenean et aliquam augue.

File No: 20181248
Project Title: Test Application

- Events: Drafts
- Events: Requiring Attention
- Events: Under Review
- Events: Post Review
- Reminders

What is an Event?

Event forms are designed to manage post-approval application forms, including:

- Amendments
- Requests to transfer funds to an external team member's institution (funding applications only)
- Other post-approval application forms

ANY Project Team Member can submit an Event form.

Event forms for research funding are routed to RIS or the Marine Institute Finance and Contracts Office once submitted (depending upon the application), while Event forms for ethics files are routed to the relevant ethics office.

The PI and project team will be notified once a decision has been made or if changes are required.

To view a previously submitted Event or start an Event form, click the **Events** button.



BACK TO HOME | Search | File No: 20181111 | APPLY NEW | News | Useful Links

	File No	Principal Investigator	Project Title	Application Type	Status Snapshot	Workflow Message
View Clone Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards\Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

Scroll to the bottom of the Events page to view all Event links.

The links available are similar to those available when submitting an application, only these are Event-specific.

File No: 20170740
Project Title: Test Project

Events: Drafts	▼
Events: Requiring Attention	▼
Events: Under Review	▼
Events: Post Review	▼
Reminders	▼

- **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 application form type, these may have been returned by RIS, the Marine Institute Finance and Contracts Office, or an ethics office. The Principal Investigator and Project Team members can edit these Event forms.
- **Events: Under Review:** This link contains Event forms submitted by the Principal Investigator or Project Team and are currently under review. These applications are read-only.
- **Events: Post Review:** This link contains post-review Event forms. These forms are read-only.
- **Reminders:** This link contains any reminders for upcoming Event forms for this application.

View Previously Reviewed Events

To view previously reviewed Events, click Events: Post Review, which will expand to show you all available Events in this category. To open an Event form, click **View Event**.

File No: 20181248
Project Title: Test Application

Events: Drafts ▼

Events: Requiring Attention ▼

Events: Under Review ▼

Events: Post Review ▲

	Event No	Event Category	Event Submission Date	Event Status	Latest Update
View Event	20181248 - 385404	Amendment (RGCS - Amendment)	2017/11/20	Approved	on 11/20/2017 2:12:21 PM
View Event	20181248 - 385402	New Approval Process (N/A)	2017/11/20	Approved	on 11/20/2017 1:55:22 PM

Reminders ▼

Event Form Identification

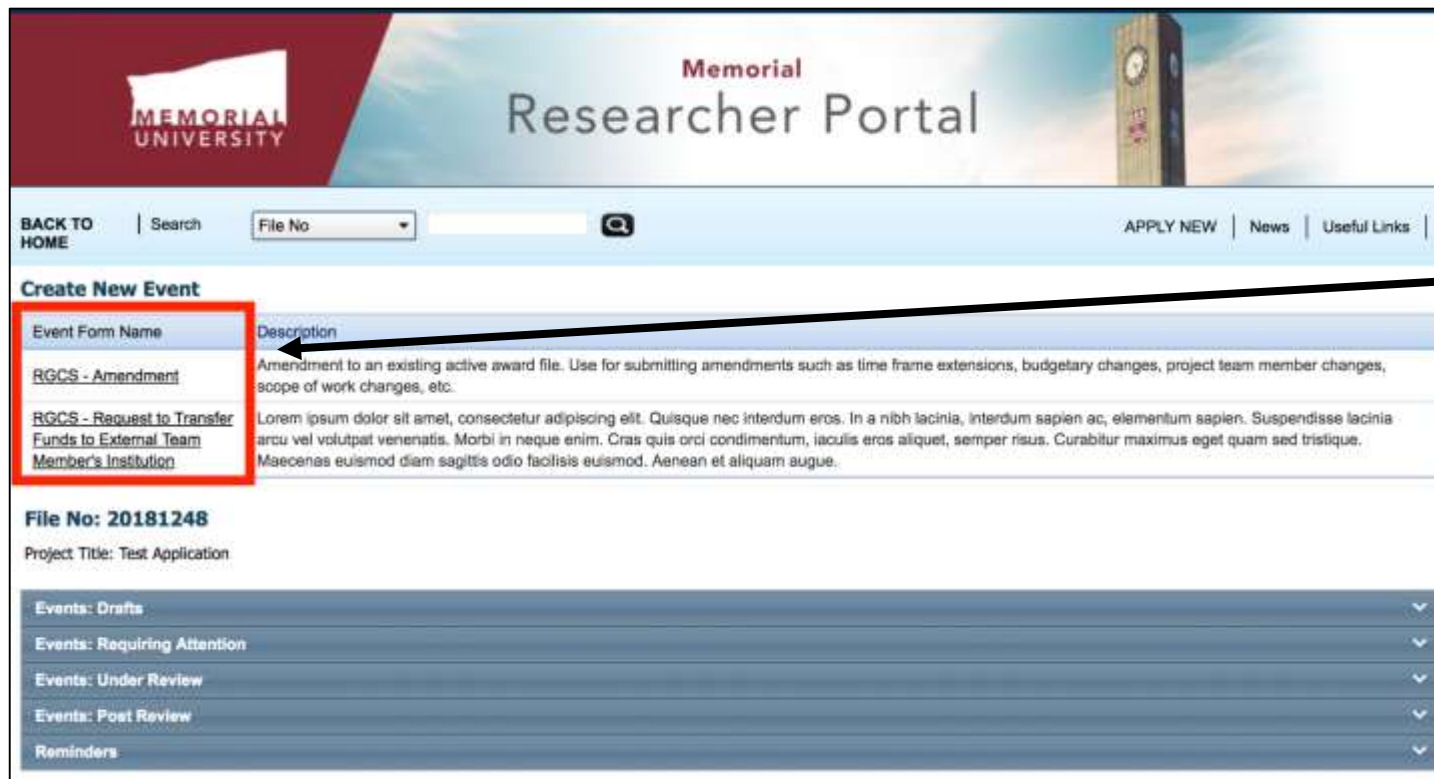
When selecting an Event Form, you must choose the office's Event form. The Event form names are prefixed with the research office's abbreviation:

1. **RIS:** Research Initiatives & Services (St. John's and Grenfell Campus)
2. **MI:** Marine Institute

Should you submit an incorrect Event Form, you will be required to resubmit the appropriate Event Form.

Submitting a New Event Form

To create a new Event form, select the appropriate Event form from the list provided on the Events page. **Please ensure that you are filling out the Event form for the appropriate research office (e.g., RIS, MI).**



Memorial
Researcher Portal

BACK TO HOME | Search | File No: [dropdown] [input] [icon] | APPLY NEW | News | Useful Links

Create New Event

Event Form Name	Description
RGCS - Amendment	Amendment to an existing active award file. Use for submitting amendments such as time frame extensions, budgetary changes, project team member changes, scope of work changes, etc.
RGCS - Request to Transfer Funds to External Team Member's Institution	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque nec interdum eros. In a nibh lacinia, interdum sapien ac, elementum sapien. Suspendisse lacinia arcu vel volutpat venenatis. Morbi in neque enim. Cras quis orci condimentum, iaculis eros aliquet, semper risus. Curabitur maximus eget quam sed tristique. Maecenas euismod diam sagittis odio facilisis euismod. Aenean et aliquam augue.

File No: 20181248
Project Title: Test Application

- Events: Drafts
- Events: Requiring Attention
- Events: Under Review
- Events: Post Review
- Reminders

Click on the Event form name to create a new Event.

Event Form Action Buttons

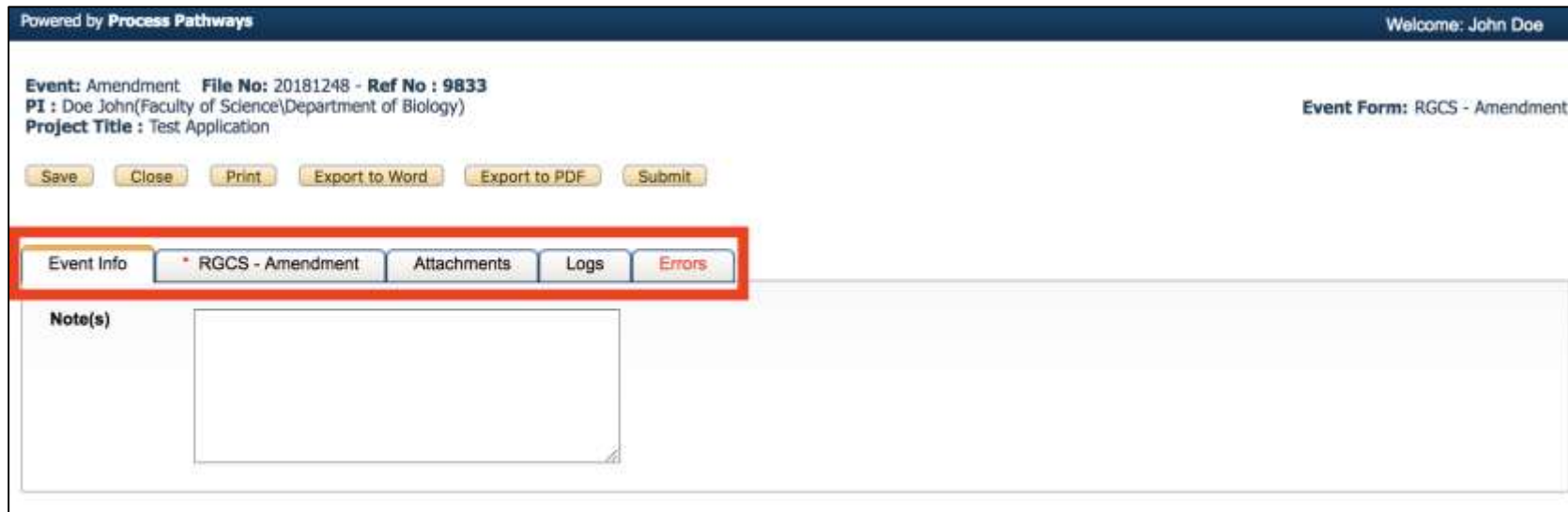
The buttons that appear at the top of an Event form are the **Event Form Action** buttons. Select these buttons to:

- **Save:** Save any changes on the Event form.
- **Close:** Exit the Event form and return to the Memorial Researcher Portal Home Page.
- **Print:** Print the Event form.
- **Export to Word:** Open the Event form as a Word Document.
- **Export to PDF:** Open the Event form as a PDF document.
- **Submit:** Submit the Event form.



Event Form Tabs

At the top of any Event form is a list of tabs that you will complete prior to submission. 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. **It is recommended that you click Save after completing each tab in order to avoid losing your work.**



The screenshot shows a web interface for an event form. At the top, it says "Powered by Process Pathways" and "Welcome: John Doe". Below this, there is a header section with the following information: "Event: Amendment", "File No: 20181248 - Ref No : 9833", "PI : Doe John(Faculty of Science\Department of Biology)", and "Project Title : Test Application". To the right of this header, it says "Event Form: RGCS - Amendment". Below the header, there are several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". Below the buttons, there is a row of tabs: "Event Info", "* RGCS - Amendment", "Attachments", "Logs", and "Errors". The "RGCS - Amendment" tab is highlighted with a red border and a red asterisk. Below the tabs, there is a large text area labeled "Note(s)" with a text input field.

Event Info Tab

The Event Info Tab allows the Principal Investigator or Project Team Members to add any additional comments about the Event form. **Complete the entire Event form before adding information in the Note(s) box.**



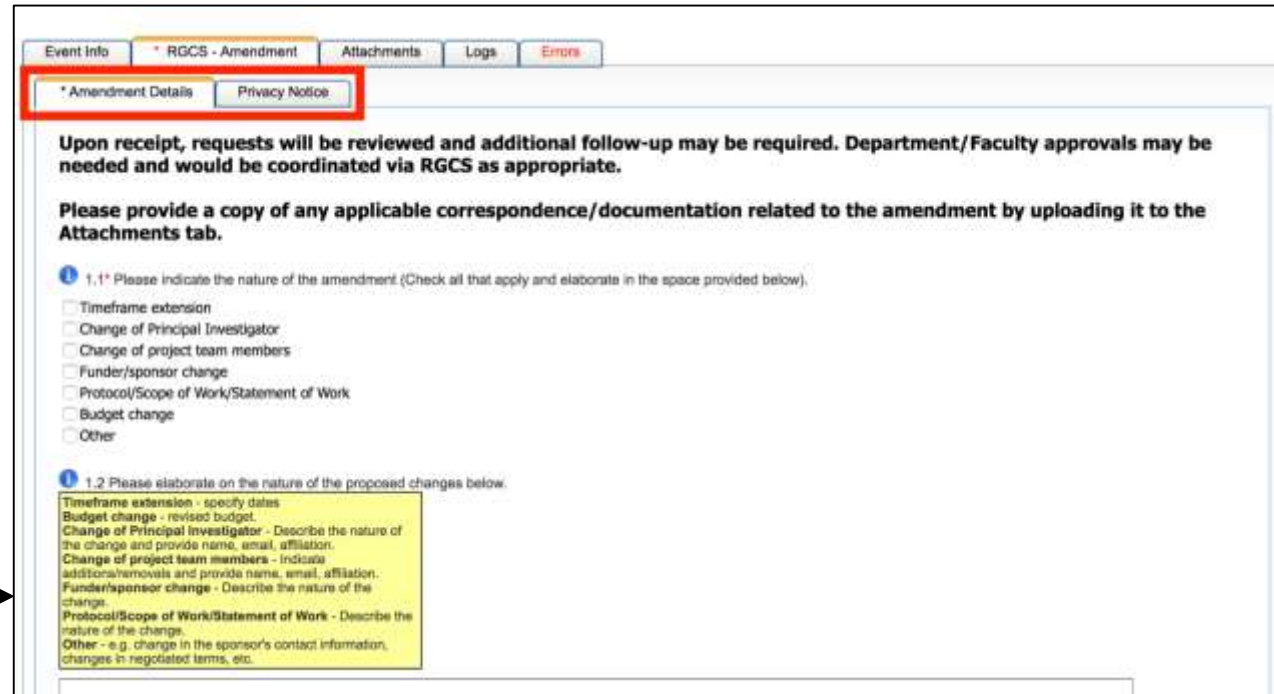
The screenshot shows a web interface for an event form. At the top, it says "Powered by Process Pathways" and "Welcome: John Doe". Below this, the event details are displayed: "Event: Amendment", "File No: 20181248 - Ref No: 9833", "PI: Doe John(Faculty of Science\Department of Biology)", and "Project Title: Test Application". On the right, it says "Event Form: RGCS - Amendment". There are several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". Below the buttons is a tabbed interface with five tabs: "Event Info", "* RGCS - Amendment", "Attachments", "Logs", and "Errors". The "Event Info" tab is highlighted with a red box. Below the tabs is a large text area labeled "Note(s)" with a scrollable input field.

Event Form Custom Questions Tab

This tab includes all questions that are directly related to your particular Event form. There may be a number of sub-tabs that organize the Event form questions into different areas. If you are unsure how to complete a question, read the information in the yellow info boxes.

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.



Event Info * RGCS - Amendment Attachments Logs Errors

* Amendment Details Privacy Notice

Upon receipt, requests will be reviewed and additional follow-up may be required. Department/Faculty approvals may be needed and would be coordinated via RGCS as appropriate.

Please provide a copy of any applicable correspondence/documentation related to the amendment by uploading it to the Attachments tab.

1.1* Please indicate the nature of the amendment. (Check all that apply and elaborate in the space provided below).

- Timeframe extension
- Change of Principal Investigator
- Change of project team members
- Funder/sponsor change
- Protocol/Scope of Work/Statement of Work
- Budget change
- Other

1.2 Please elaborate on the nature of the proposed changes below.

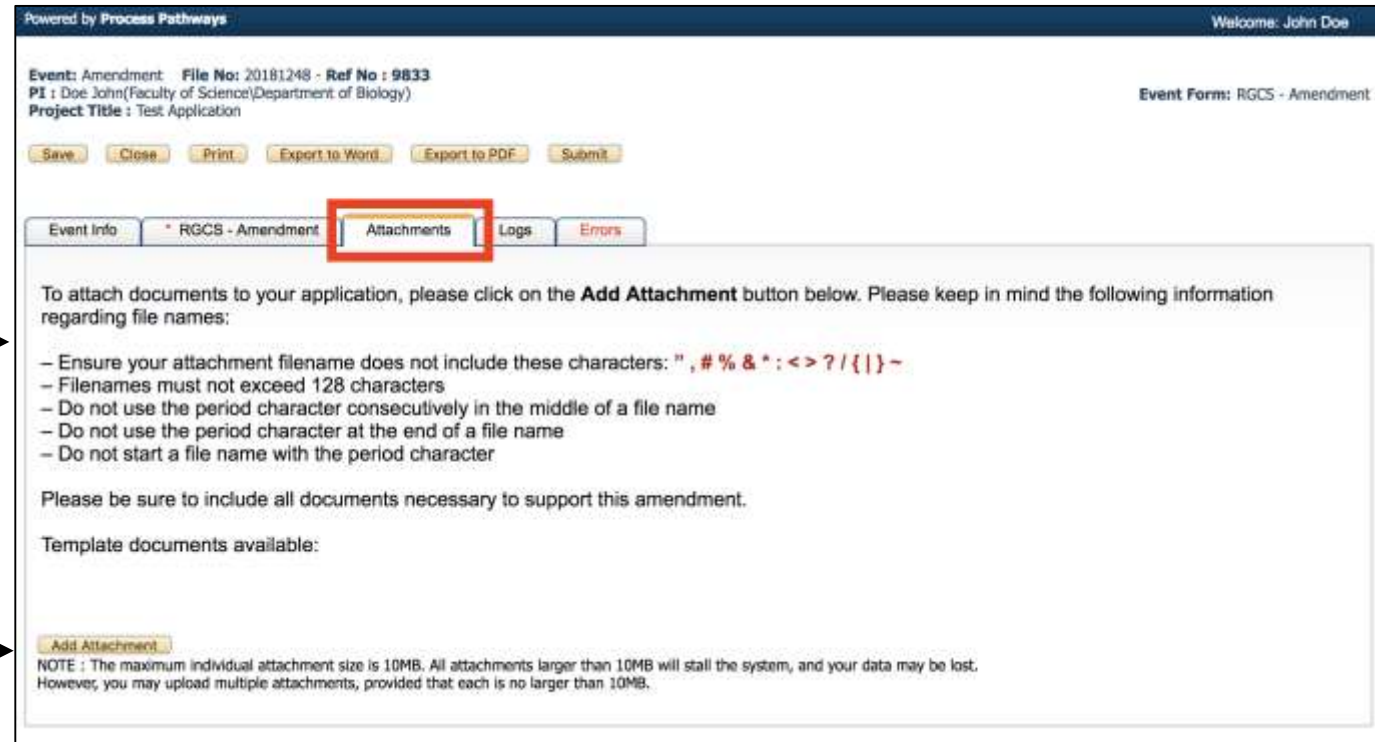
Timeframe extension - specify dates
Budget change - revised budget.
Change of Principal Investigator - Describe the nature of the change and provide name, email, affiliation.
Change of project team members - indicate additions/removals and provide name, email, affiliation.
Funder/sponsor change - Describe the nature of the change.
Protocol/Scope of Work/Statement of Work - Describe the nature of the changes.
Other - e.g. change in the sponsor's contact information, changes in negotiated terms, etc.

Attachments Tab

The Attachments Tab is where users upload any supporting documents required for the Event form.

At the top of the tab, there may be specific instructions on what should be uploaded.

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



Powered by Process Pathways Welcome: John Doe

Event: Amendment - File No: 20181248 - Ref No : 9833
PI : Doe John(Faculty of Science/Department of Biology)
Project Title : Test Application Event Form: RGCS - Amendment

Save Close Print Export to Word Export to PDF Submit

Event Info * RGCS - Amendment **Attachments** Logs Errors

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

Please be sure to include all documents necessary to support this amendment.

Template documents available:

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.

File Name Guidelines for Attachments

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

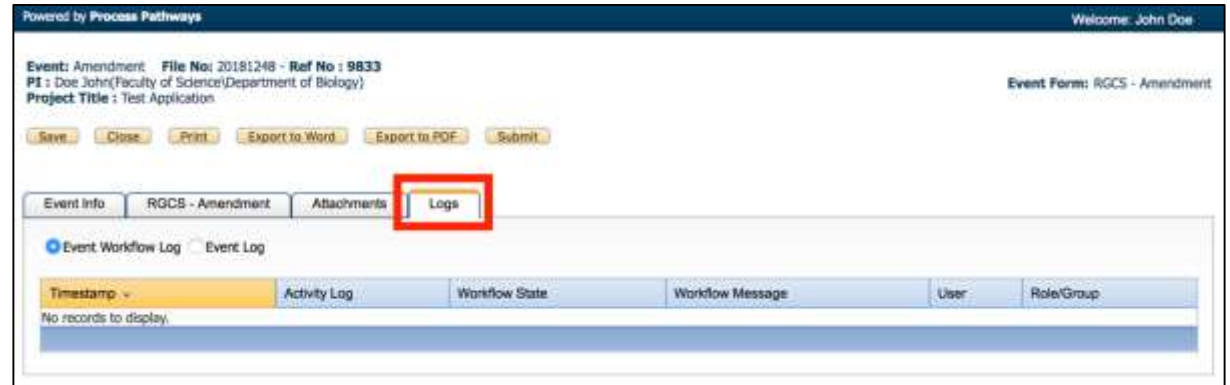
- Ensure your attachment filename does not include these characters: " # % & * : < > ? / { | } ~ []
- Filenames must not exceed 128 characters.
- Do not use the period character consecutively in the middle of a file name.
- Do not use the period character at the end of a file name.
- Do not start a file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

Logs Tab

The Log Tab allows the PI and Project Team Members to view all actions on an Event form.

- Under the *Event Workflow Log*, you can track the history of the Event. It tracks and time stamps approvals and messages between the PI and RIS or the MI Finance and Contracts Office.
- Under the *Event Log*, all changes made to the form are tracked by the user. It is the responsibility of the PI to review the Event log to ensure they are aware of all changes made by Project Team Members prior to submission.



Powered by Process Pathways Welcome: John Doe

Event: Amendment File No: 20181248 - Ref No : 9833
PI : Doe John(Faculty of Science/Department of Biology)
Project Title : Test Application Event Form: RGCS - Amendment

[Save](#) [Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Submit](#)

Event Info | RGCS - Amendment | Attachments | **Logs**

Event Workflow Log Event Log

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
No records to display.					



Powered by Process Pathways Welcome: John Doe

Event: Amendment File No: 20181248 - Ref No : 9833
PI : Doe John(Faculty of Science/Department of Biology)
Project Title : Test Application Event Form: RGCS - Amendment

[Save](#) [Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Submit](#)

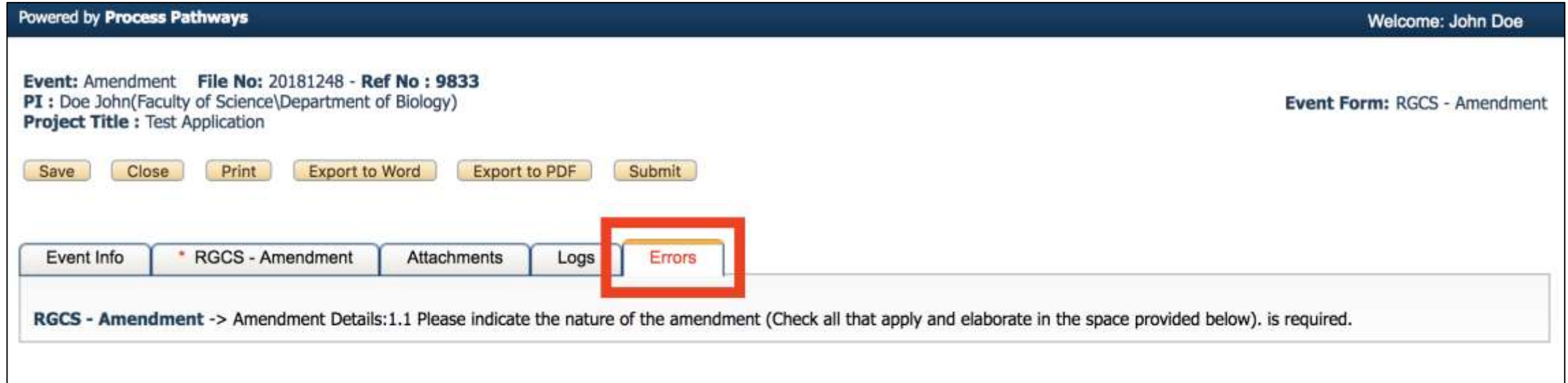
Event Info | RGCS - Amendment | Attachments | **Logs**

Event Workflow Log Event Log

Timestamp	Log Activity	User
2017/11/20 14:07	RGCS - Amendment: Amendment Details -> Please indicate the nature of the amendment (Check all that apply and elaborate in the space provided below), has been changed from "" to "Other" Amendment Details -> Please elaborate on the nature of the proposed changes below. has been changed from "" to "Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque nec interdum eros. In a nibh lacinia, interdum sapien ac, elementum sapien. Suspendisse lacinia arcu vel volutpat venenatis. Morbi in neque enim. Cras quis orci condimentum, iaculis eros aliquet, semper risus. Curabitur maximus eget quam sed tristique. Maecenas euismod diam sagittis odio facilisis euismod. Aenean et aliquam augue."	John Doe
2017/11/20 14:05	New Event Created	John Doe

Errors Tab

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



The screenshot shows a web application interface with a dark blue header. On the left, it says "Powered by Process Pathways". On the right, it says "Welcome: John Doe". Below the header, there is a section with event details: "Event: Amendment", "File No: 20181248 - Ref No : 9833", "PI : Doe John(Faculty of Science\Department of Biology)", and "Project Title : Test Application". To the right of this section, it says "Event Form: RGCS - Amendment". Below the details, there are several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". Below the buttons, there is a tabbed interface with five tabs: "Event Info", "RGCS - Amendment", "Attachments", "Logs", and "Errors". The "Errors" tab is highlighted with a red border. Below the tabs, there is a text area containing the text: "RGCS - Amendment -> Amendment Details:1.1 Please indicate the nature of the amendment (Check all that apply and elaborate in the space provided below). is required."

Saving an Event Form

If you wish to edit or submit your Event form at a later date, click **Save** to save your most recent edits and click **Close**.



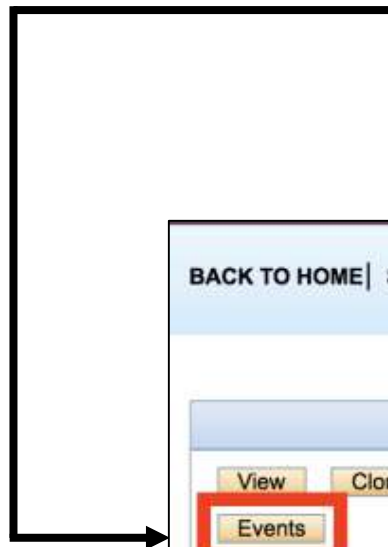
The screenshot shows a web interface for an event form. At the top, it says "Powered by Process Pathways" and "Welcome: John Doe". The main content area displays event details: "Event: Amendment", "File No: 20181248 - Ref No : 9833", "PI : Doe John(Faculty of Science\Department of Biology)", and "Project Title : Test Application". On the right, it says "Event Form: RGCS - Amendment". Below the details is a row of buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". The "Save" and "Close" buttons are highlighted with a red box. Below the buttons is a tabbed interface with tabs for "Event Info", "RGCS - Amendment", "Attachments", "Logs", and "Errors". The "Event Info" tab is active, showing a "Note(s)" section with a large text area.

Retrieving a Saved Event Form

In order to access the previously saved Event form, choose the link **Events: Drafts**. Find the appropriate application and click the **Events** button.

Role: Principal Investigator
Applications: Drafts
Applications: Requiring Attention
Applications: Under Review
Applications: Post-Review
Applications: Withdrawn
Events: Drafts
Events: Requiring Attention
Reminders

Role: Project Team Member
Applications: Drafts
Applications: Requiring Attention
Applications: Under Review
Applications: Post-Review
Applications: Withdrawn
Events: Drafts
Events: Requiring Attention
Reminders



BACK TO HOME Search	File No	20181111		APPLY NEW	News	Useful Links		
View	Clone	Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards\Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

Retrieving a Saved Event Form Cont'd

Scroll to the bottom of the Events page and click on **Events: Drafts** to expand your available saved Events. Click **Edit** to open the Event for editing.

File No: 20181248
Project Title: Test Application


Events: Drafts ^

	Event No	Event Category	Event Form	Comments	Latest Update
View Event Edit Delete	20181248 - Ref No : 9833	Amendment	RGCS - Amendment		John Doe on 11/20/2017 2:07:31 PM

Events: Requiring Attention v
Events: Under Review v
Events: Post Review v
Reminders v

Submitting an Event Form

When you have completed the Event form, click the **Submit** button. **Once you click Submit, you will no longer be able to edit the Event form.**



Powered by Process Pathways

Event: Amendment File No: 20181248 - Ref No : 9833
PI : Doe John(Faculty of Science\Department of Biology)
Project Title : Test Application

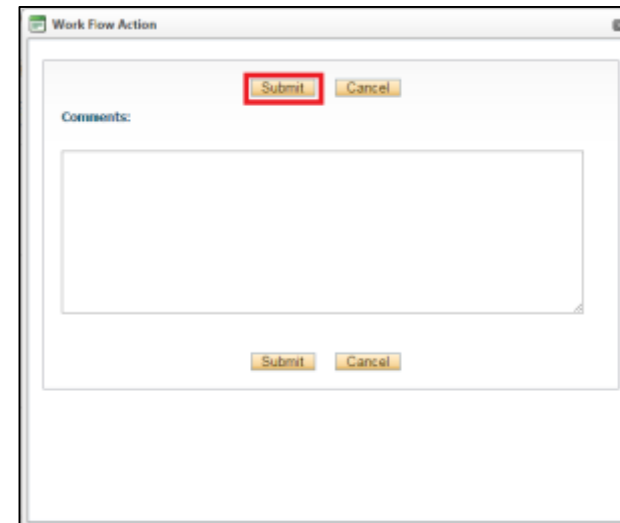
Save Close Print Export to Word Export to PDF **Submit**

Event Info * RGCS - Amendment Attachments Logs Errors

Note(s)

A screenshot of a web application interface for submitting an event form. The interface is titled "Powered by Process Pathways". It displays event details: "Event: Amendment", "File No: 20181248 - Ref No : 9833", "PI : Doe John(Faculty of Science\Department of Biology)", and "Project Title : Test Application". Below the details are several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". The "Submit" button is highlighted with a red rectangle. Below the buttons is a tabbed interface with tabs for "Event Info", "RGCS - Amendment", "Attachments", "Logs", and "Errors". The "Event Info" tab is active, showing a "Note(s)" section with a large text input area.

A workflow action block will appear. Make any necessary comments about your form. Click **Submit**.



Work Flow Action

Comments:

Submit Cancel

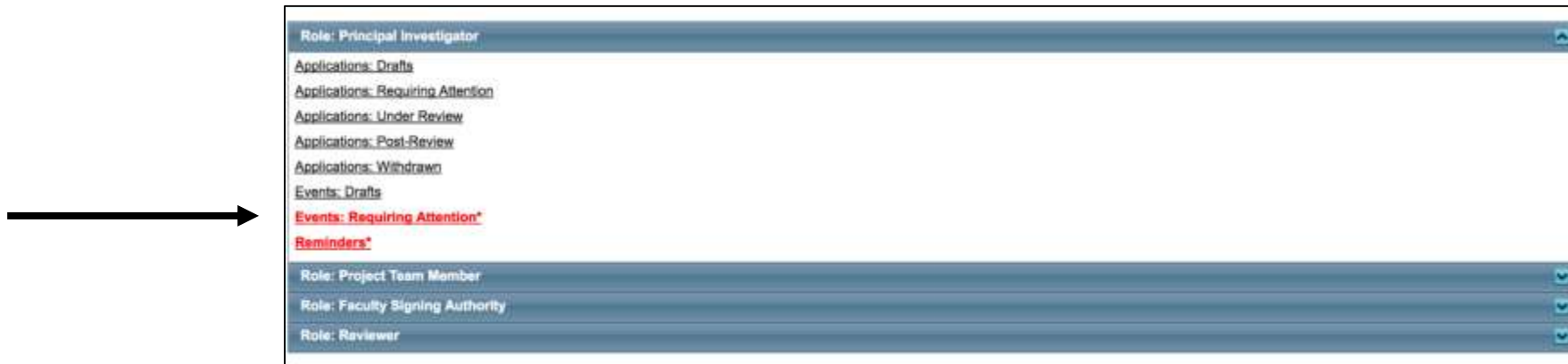
Submit Cancel

A screenshot of a "Work Flow Action" dialog box. It features a "Comments:" label followed by a large text input area. At the top right of the input area are "Submit" and "Cancel" buttons, with the "Submit" button highlighted by a red rectangle. At the bottom of the dialog box are another "Submit" and "Cancel" button pair.

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

Event Forms Requiring Revisions

When an Event Form has been returned from a research office for revisions, the quick link “Events: Requiring Attention” will be boldfaced and red.



Click the quick link and then select **Events** to enter the Events for a specific application.



A screenshot of a web application interface. At the top, there is a search bar with 'File No' and '20181111'. Below the search bar is a table with columns: File No, Principal Investigator, Project Title, Application Type, Status Snapshot, and Workflow Message. The first row of the table has the following data: File No: 20181111, Principal Investigator: Dr. John Doe (Research Units), Project Title: Test Application, Application Type: Application for Research Funding (Awards\Awards), Status Snapshot: Project Status: Active, Workflow Status: Approval Decision Made, Workflow Message: approved. In the first column of the table, there are three buttons: View, Clone, and Events. The Events button is highlighted with a red box.

	File No	Principal Investigator	Project Title	Application Type	Status Snapshot	Workflow Message
View Clone Events	20181111	Dr. John Doe (Research Units)	Test Application	Application for Research Funding (Awards\Awards)	Project Status: Active Workflow Status: Approval Decision Made	approved

Event Forms Requiring Revisions Cont'd

Find the Event under the Events: Requiring Attention section. Click **Edit** to edit the specific Event form.

File No: 20181248
Project Title: Test Application

Events: Drafts ▼

Events: Requiring Attention ▲

	Event No	Event Category	Event Submission Date	Event Status	Latest Update
View Event Edit	20181248 - 385404	Amendment (RGCS - Amendment)	2017/11/20	Pending	on 11/20/2017 2:09:59 PM


Events: Under Review ▼

Events: Post Review ▼

Reminders ▼

Event Forms Requiring Revisions Cont'd

To see the workflow message from RIS or the MI Finance and Contracts Office, go to the Logs Tab. The Workflow message in the table will provide information regarding the necessary changes. Once you have made the necessary edits, click **Re-Submit** in the Event Form Action Buttons to re-submit the form. In the the pop-up Work Flow Action window, enter a comment and click **Submit**.



Event: Amendment File No: 20181248 - 385404
PI : Doe John(Faculty of Science\Department of Biology)
Project Title : Test Application

Event Form: RGCS - Amendment

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

Event Info RGCS - Amendment Attachments Logs

Event Workflow Log Event Log

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
20/11/2017 14:10	Event Workflow State has been changed from ORS Review to Pending Info by ORS . Event Status has been changed from Submitted by Researcher to Pending	ORS Review -> Pending Info by ORS	Please refer to the email on DATE regarding additional information needed.	RGCS Staff	Office of Research Services/Office of Research Ethics
20/11/14:08			Please review. [Action: Submit]	John Doe	Principal Investigator

Re-submit after you have made **all** necessary edits to your Event form.

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/>

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