GUIDE

RP – Smallwood & ISER

Faculty of Humanities and Social Sciences
Sponsored Research Guides
Researcher Portal: Grants

Contents:

1. Obtain an RP account

To use the Researcher Portal, you need an account.

- If you don't already have an RP account, submit a request for one here: https://rpresources.mun.ca/request-romeo-account/
- You need to request an account using your Memorial login ID.
- Use Chrome, **do not use Safari**. For more RP quirks see point #10, below.
- When you have received an email informing you that the account has been set up, go to point 2.

2. Start a new RP file – 'General Use Application'

You need to start a new RP file for *every* research grant application you wish to submit; that is, you will need to start a new RP file for each funding proposal.

- Log in to the Researcher Portal using your Memorial login ID.
- On the home screen, click "APPLY NEW" in the upper, right hand side of the screen.
- This will take you to a new screen where you should hit option 1. "General Use Application".
- You will then have to answer the questions in each tab. Follow the points below (#'s 4-9) which provide instructions for some of the tabs.

3. Confirm faculty and department affiliation

It is crucial that the first tab you check after you start a new RP file is the "Project Team Info" tab.

- Ensure your "Affiliation" is the correct faculty and department. This controls where the file will be routed for approvals after you press "Submit."
- Researchers with multiple department affiliations should select the appropriate department where their research funding is normally administered from the drop-down menu. This selection will direct where your file goes for approvals.
- If the affiliation is incorrect, you will need to request that it is updated **before you hit submit**; you can do so here: Update My Account Information.

4. **Add mandatory "team members"**

To process your application, administrators and approvers need to be able to view and/or edit your RP file; to do so, they need to be "team members".

Therefore, within the "Project Team Info" tab, you MUST add several people as "team members" to *every* RP file you create. These include:

1. "Workflow Coordinator" - this person works at the institution level and keeps track of research grant applications on behalf of the university. You don't need their actual name to add them as team member – just use "Workflow Coordinator"
2. "Heather C. O'Brien (Grants Facilitator)"- Grants Facilitation Officer (GFO) who works for Faculty of HSS and helps applicants in obtaining HSS approval, needed for all research grant applications.
3. "Matthew Milner (Grants Facilitator)," - GFO who works for Faculty of HSS and helps applicants in obtaining HSS approval, needed for all research grant applications.
4. Your supervisor(s) - if you're a student at Memorial, you must add your supervisor(s).
5. Potentially others - For some grant applications, you may need to add other team members such as co-applicants.

Collaborators, and MOST external researchers, are NOT normally added to the file. If you wish to add an external researcher, you may, but they will need an RP account if you wish them to access the file.

Specific Competitions:

Smallwood & ISER – Add "Heather Patey" - works for ISER/Smallwood Foundation and helps process the applications to bring them to adjudication committee and also helps with accounts if awarded.

Here are the steps to add a team member to an RP file; the example here is for the Workflow Coordinator:

1. Scroll to the bottom of the "Project Team Info" tab and click "Add New". This will take you to a new window called "Project Team Member Edit."
2. Click "Search Profiles" then type "Workflow" in the "Last Name" field

NOTE: You *MUST* "Search Profiles" to add a Team Member; DO NOT add anyone to your file by filling in the boxes you see in the "Project Team Member Edit" window, as this does not permit access to the RP file itself.

3. Click "Search." Within the blue "Options" table, press "Select" for the "RIS Workflow Coordinator".

4. You will be taken back to "Project Team Member Edit" window. Now choose from the "Role in Project" drop-down menu; select "RIS Workflow Coordinator" then press the yellow "Save" button.
5. Click "Save" again on the main file's window (the RP does not save automatically so save often!)

Repeat these 5 steps for each of the mandatory team members listed above and choose the correct "Role in Project" for each.

NOTE: although both HSS GFOs are added to every RP file, one GFO will be the primary reviewer and contact for your application. The GFO handling your file will be assigned on a workflow-basis; you will be informed as to who is handling your file – Heather O or Matt. Heather P will be involved in all applications.

PLEASE BE AWARE:

- Anyone you add as a team member can view AND edit the file but CANNOT submit on your behalf.
- If you want to/need to add a team member, the person MUST have an RP account. You may request an account be set up on their behalf, but they will have to answer a verification e-mail through their own e-mail account for it to be opened. The team member may also request an account for themselves.
- Team members listed on your application/proposal who do *not* have an RP account (such as colleagues or partners who are external to Memorial) should be added to the "Comments" box of the "Project Team Info" tab.
- The Workflow Coordinator or a Grant Facilitator may add team members to your file as they deem necessary, such as a Contracts Officers, Grants Coordinators, and/or other institutional administrative staff.

5. Add a Project Title
Complete the Project Info tab by entering a title (if applying for multiple grants for the same project, we recommend differentiating the titles slightly to distinguish which agency each is for), start and end dates, and key words.

6. Link approved Memorial certifications
If you have already received clearances from Memorial, such as ICEHR, HREB, IACC, CERIIG, or you have a separate Indigenous Research File , you must link them to the application's RP file.

To link Memorial clearances, use the "Project Info" tab. To do so, follow these steps:

1. At the bottom of the "Project Info" tab, click "Search."
2. Hit "select" for the certification related to the project this RP file is for.
3. Hit "save."

For applications not yet approved by an ethics board or for other types of certifications or permits, you should list these in sub-tab 5 of the "General Use Applications" tab.

7. Select funding agency and program
You must indicate a funding agency/sponsor and the program using the "Project Sponsor Info" tab.

Follow these steps:

1. Click on the "Project Sponsor Info" tab
2. Click "Add New" and a new window entitled "Sponsor Info" will open.
3. Click "Agency" search for the sponsor by either a portion of the name or an abbreviation.
4. Once the window returns to the previous screen, choose the appropriate program by selecting the name of the competition from the drop down "Program" menu.
5. Do NOT complete/generate the "disbursement table" found at the bottom of this "Sponsor Info" window.
6. Click "Save."
7. On the main file window, hit "save" again.

Specific Sponsors & Competitions:

o Memorial University is the agency for Smallwood, ISER, Harris Centre, Public Engagement, SSHRC Explore / Exchange, Publication Subvention, etc.
o Various Provincial Government departments appear for Provincial Archaeology Grants, Leverage R&D / Innovation Fund.

8. Complete the General Use Applications tabs

Complete all sub-tabs in the General Use Application tab. If you have questions about the answers to any of these tabs, please speak to your supervisor. If you still have questions, contact the GFO handling your file.

- For "Indirect Costs (Overhead)", all Memorial internal competitions, as well as most Tri-Agency (SSHRC, NSERC, and CIHR) do not have indirect costs.
- TIP: answers the questions so the information in the RP matches the information contained application.

9. Attach application and documents

You must attach all relevant documents by uploading them under the "Attachments" tab.

Before pressing "Submit," you should attach:

1. A final draft of the application form (with relevant signatures if needed)
2. Obtained ethics/permits/certifications. If your project is an Indigenous research project, Agreement in Principle must be attached or CERIIG approval.
3. If there are in-kind or cash contributions, back-up documentation from the person with signing authority over the cash or in-kind contribution must be attached.
4. If applying to more than one agency for the same project (not including fellowships), an Excel sheet with a full project budget breakdown must also be uploaded.

To attach a file, click "Add Attachment" then either drag and drop the file to the "Upload Attachment" comment box, or you can browse and find the file on your computer. Click "Add Attachment".

NOTE:

- You do *not* have to fill out the "Description" text box or select a "doc agreement" type; these are optional but helpful to reviewers and team members if completed.
- Filenames cannot exceed 128 characters or include: " , # % & * : < > ? / { | } ~

- The maximum attachment size is 10 MB. If your file is larger, you will have to break it into parts.

10. Press "Submit" by the HSS internal deadline

You must press submit in order to file your application for review by your Department and the HSS Dean's Office, prior to final submission.

NOTE: For SSHRC Insight, Insight Development, NSERC Discovery, RTI, and CIHR Project and Foundation Grants, refer to the competition-specific guidelines for submission procedures. The below is describes how RP research grant submissions take place; numerous competitions, including all research agreements, follow a different procedure.

- You must "Submit" by the HSS internal deadline (consult the HSS Research Funding Tracker for deadlines) which is typically **ten days prior** to the external deadline. If you submit past this deadline, HSS cannot guarantee that the file will be approved by the final deadline.
  Note also that:
  o You must complete all mandatory tabs and subtabs in order to "Submit" the file. An "Errors" tab will be present until all mandatory questions (demarcated with an *asterisks) have been answered; once everything has been completed, the "Errors" tab will disappear and you will be able to "Submit."
  o Before submitting, it is a good idea to check the "Logs" tab. Here, click the "Application Log" option to see the latest activity on the file. You want to ensure a team member has not made revisions to the file that you are unaware of before you submit.
  o When you press the "Submit" button, you MUST write a comment in the pop-up window in order to complete the submission. Please be aware that EVERYONE who has signing authority or who is a team member can see this comment. We recommend simply stating "Please approve" although if there are caveats or things to note regarding the file, you may add other comments.
- Pressing "Submit" locks your file from further edits. Your Department Head will receive an automatically-generated e-mail. They then log into their RP account, reviews your file, and then "Approves" it. They will contact you via email if they have questions.
- Once the Department Head approves, the file is routed to the HSS Dean's Office for review and approval. The GFO handling your file will begin the HSS administrative review. If this review generates any feedback or need for revisions, the GFO will contact you via e-mail.
- Once the Dean's Office approves the RP file, it is routed to RIS. In some competitions you may be required to submit the application directly, or via a platform, yourself. If you aren't sure, check the Research Funding Tracker, or contact an HSS GFO.
- If at any point an "Approver" (e.g. the Department Head or HSS Dean's Office) require edits to the RP file and/or its attachments, they can return the file to the researcher, thus unlocking it. The researcher makes the necessary changes and then presses, "Re-submit".

11. Changes or additions to existing RP files

Any post-review changes, additions, or deletions require use of an "event". These may include:

- opening an account with an award letter or notice
- a request for transferring funds to an external team member's institution;
- adding agreements or contracts;
- an amendment to the file, which might include a team change (addition or deletion), a time extension, budgetary or scope of work changes; etc.

Anyone listed on the original RP file as a team member can submit an Event. If you would like to add a team member to an RP file, this request must be submitted by an existing team member as an event.

To launch an Event against one of your RP files, you should:

1. Find the original RP file that you want to change:
   a. TIP: if you know the eight-digit RP file number, you can search for it from the home screen.
   b. Otherwise, you can browse your RP account to find it. Depending on your role in the project, it could be located in either the block "Role: Principal Investigator" or "Role: project Team Member."
   c. Depending on whether the grant has been awarded or not, in each block you may find the file under "Applications: Under Review" or "Applications: Post-Review."
2. Hit the yellow "Events" button.
   a. Note: if there is no Events button present, contact an HSS Grants Facilitator. They can request that RIS make the file "eventable" for you.
3. In the new "Create New Event" window, choose which event type best fits what you want to convey to RIS; there are descriptions listed beside each event type. The options are:
   a. RIS-Agreement
   b. RIS-Amendment
   c. RIS-Request to Transfer Funds to External Team Member's Institution
   d. RIS-Other Documents
   e. RIS-Certification Verification
      NOTE: DO NOT use any events listed as 'MI' or 'Marine Institute'.
4. Complete the tabs in the Event, upload the necessary documents, and hit "Submit".

When you press "Submit", the Event will go directly to RIS, bypassing Department Heads and the Assoc. Dean; therefore, if relevant, obtain necessary department and/or faculty approvals and upload them as attachments before pressing "Submit" in the event. These could be copies of e-mails or official letters, for example.

12.   Quirks about the RP

- **Press "Save" often** (yellow button at the top left)! The RP does *not* save automatically.
- Do *not* exit by simply closing your browser – this "locks" the file from activity. Instead, *always exit the file by pressing the yellow "Close" button at the top of the file.*
- **RP is *not* compatible with Safari**. At all. Use Chrome instead.
- **Do *not* have multiple RP windows open** at the same time.
- **Do *not* use these symbols *anywhere*** in the RP file because they do not play nice with ROMEO: **< >**
- Be aware of **space limits in text boxes.** If you need more space, make a note in the text box that there is an attachment and then upload the entire response in the Attachments tab.

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- You should not simply copy and paste from Word or other document programs into comment boxes in the RP. Instead, "copy" the Word document text and then right click in the RP comment box and **"paste as plain text"** OR, alternatively, copy and paste into "Note Pad" or a similar program, and then copy and paste that into the comment box. If you simply copy and paste, you may be carrying over invisible formatting and an error message may be triggered if the amount of text you are pasting exceeds the space limit of the text box.
- **Do *not* press the browser's "back" button** – instead, navigate within the RP.

13.   RP Support

Here is a list of supports available for the Researcher Portal:

- General information: https://rpresources.mun.ca/awards/
- FAQs: https://rpresources.mun.ca/help-2/faq/
- Manual for creating a new RP file: https://rpresources.mun.ca/wp-content/uploads/2018/10/25.10.2018-Creating-a-New-Application-RGCS.pdf
- Post-award manual: https://rpresources.mun.ca/wp-content/uploads/2017/12/24.11.2017-Creating-and-Managing-Events.pdf
- Training videos: https://rpresources.mun.ca/human-ethics/videos/
- Request a Memorial Researcher Portal account: https://rpresources.mun.ca/request-romeo-account/
- Update my Account Information: https://rpresources.mun.ca/request-romeo-account/update-research-portal-account/
- Submit a help ticket: https://rpresources.mun.ca/help-2/help/

HSS can also offer support through its GFO:

- Heather C. O'Brien: HSSResearchAdmin@mun.ca, 864-8603
- Matthew Milner: HSSResearchGrants@mun.ca, 864-8050

Other Useful Links

Links to useful information:	URL
Smallwood Foundation Research Grant	https://www.mun.ca/smallwood/funding-opportunities/research-grant/
ISER Research Grant	https://www.mun.ca/iser/funding-programs/iser-research-grant/
HSS Research Support Services website	https://www.mun.ca/hss/faculty-and-staff/research-support-services/
HSS Research Funding Tracker	https://www.hss.mun.ca/funding/dashboard
Memorial's Indigenous Research Policy	https://www.mun.ca/research/Indigenous/
Memorial's Human ethics	https://rpresources.mun.ca/human-ethics/
Memorial's Animal care	https://rpresources.mun.ca/animal-care/