

Memorial’s Researcher Portal: Smallwood & ISER Applicants

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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 the Smallwood Research Grant and a second one if you are also applying for an ISER (and additional RP files for additional grants).

- 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” for the St. John’s campus.
- 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 added as “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 – they are in the database as “Workflow Coordinator.”
2. “Heather C. O’Brien (Grants Facilitator)” **and** “Matthew Milner (Grants Facilitator)” - Grants Facilitation Officers (GFO) who work for Faculty of HSS and helps applicants in obtaining HSS approval, needed for all Smallwood and ISER research grant applications.
3. “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
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 RP file.

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 by filling in the boxes you see in the “Project Team Member Edit” window, as this will not properly add the team member and they will not be able to view your file.

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 steps for each of the mandatory team members listed above and choose the correct “Role in Project” for each.

NOTE ALSO: 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 instead 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, CERIG, 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” and if applying for Smallwood, search “Smallwood”. If applying for ISER, then search for “Memorial University.” Hit the yellow “Select” button.
4. In the drop down “Program” menu, choose “Grant” if applying for Smallwood or “Inst of Soc & Econ Res” if applying for ISER.
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.

8: Complete the General Use Applications tabs

Complete all 11 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 tab 7, Indirect Costs, check N/A as neither the Smallwood Foundation nor ISER allow overhead to be included in research grant budgets.
- TIP: answers the questions so the information in the RP matches the information contained in your Smallwood/ISER application.

9: Attach application and documents

You must attach all relevant documents by uploading them under the “Attachments” tab. Therefore, before pressing “Submit,” you should attach:

1. A final draft of the Smallwood/ISER application form (with relevant signatures)
2. Obtained ethics/permits/certifications. If your project is an Indigenous research project, Agreement in Principle or CERIG approval but be attached.
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 [Multiple Applications Master Budget Template](#) 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 to Smallwood or ISER.

- You must “Submit” by the HSS internal deadline (consult the [HSS Research Funding Tracker](#) for deadlines) which is typically *ten days prior* to the Smallwood/ISER deadline. If you submit past this deadline, HSS cannot guarantee that the file will be approved by final Smallwood/ISER deadline.

Note also that:

- 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.”
- 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.
- 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 ISER/Smallwood as official submission to the competition. The Dean’s Office will complete their review by Smallwood/ISER’s deadline.
- 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: Submitting an Event against your RP account

Once you have received email notification that you’ve been awarded a Smallwood or ISER research grant, you must formally accept the award by replying to the email, and then also submit the award letter via an Agreement Event against your original RP file. To do so, follow these steps:

- Log in to the Memorial Researcher Portal: <https://rresources.mun.ca/>
- Type your RP file # into the search bar at the top of the screen; your awarded file should appear.
- Click on the Events button (left side of entry).
- Click the words “RIS- Agreement” from the list that appears.
- In the first tab, explain that you are accepting the award and would like account opening process to begin.
- In the second tab, you must complete the questions in each sub-tab as it applies to your project now.
- In the third tab, attach the award letter.
- Click on the Save button at the top.
- Click on the Submit button; a pop-up window will appear and you should write a comment such as “Accepting award” and hit Submit again. The Event will route to RIS for account opening process.

NOTE: There are other types of Events that you may need to submit during the life of the grant. The main event types are for amendments, for example extending the end date or a major budget change. In these instances you should first contact Heather Patey to request the amendment. Once the Smallwood/ISER office has approved your amendment (via email is fine), you must then submit an “Amendment” Event against your original RP file to inform the Dean’s Office, RIS and FAS about the change. Follow the above steps, except choose the “Amendment” event, and for attachments, you should upload a copy of the email approval, along with any other documents that should be on file for it.

12: Submitting progress reports and the final report

When you submitted your Smallwood and/or ISER application, you agreed to “provide a progress report on my research at any time, upon the request of the Director,” and to “provide a final report on [your] research within 30 days of completion of the Research Grant.” These reports should be emailed to the Smallwood/ISER office, but must also be submitted to RIS via an Event in the RP. To submit this event, you should:

- Log in to the Memorial Researcher Portal: <https://rresources.mun.ca/>
- Type your RP file # into the search bar at the top of the screen; your awarded file should appear.
- Click on the Events button (left side of entry).
- Click the words “RIS- Other Document” from the list that appears.
- In the first tab, explain the type of document you are submitting and that you would like it added to your RP file.

- In the second tab, you must complete the questions in each sub-tab as it applies to your project now.
- In the third tab, attach the report.
- Click on the Save button at the top.
- Click on the Submit button; a pop-up window will appear and you should write a comment such as “Accepting award” and hit Submit again. The Event will route to RIS.

13: Things To Know: Quirks about the RP

- **Press “Save” often** (yellow button at the top left)! The RP does *not* save automatically.
- **Always exit the file by pressing the yellow “Close” button at the top of the file.** Do *not* exit by simply closing your browser – this “locks” the file from activity.
- **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.
- 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.**” 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.

14: RP Support Services

Here is a list of support services available for the Researcher Portal:

- General information: <https://rpresources.mun.ca/awards/>
- FAQs: <https://rpresources.mun.ca/help-2/fag/>
- 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 GFOs:

- 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/research/for-researchers/
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://rresources.mun.ca/human-ethics/
Memorial's Animal care	https://rresources.mun.ca/animal-care/