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cuResearch

User's Manual

Rev. June 2019

Introduction to cuResearch

What is cuResearch?

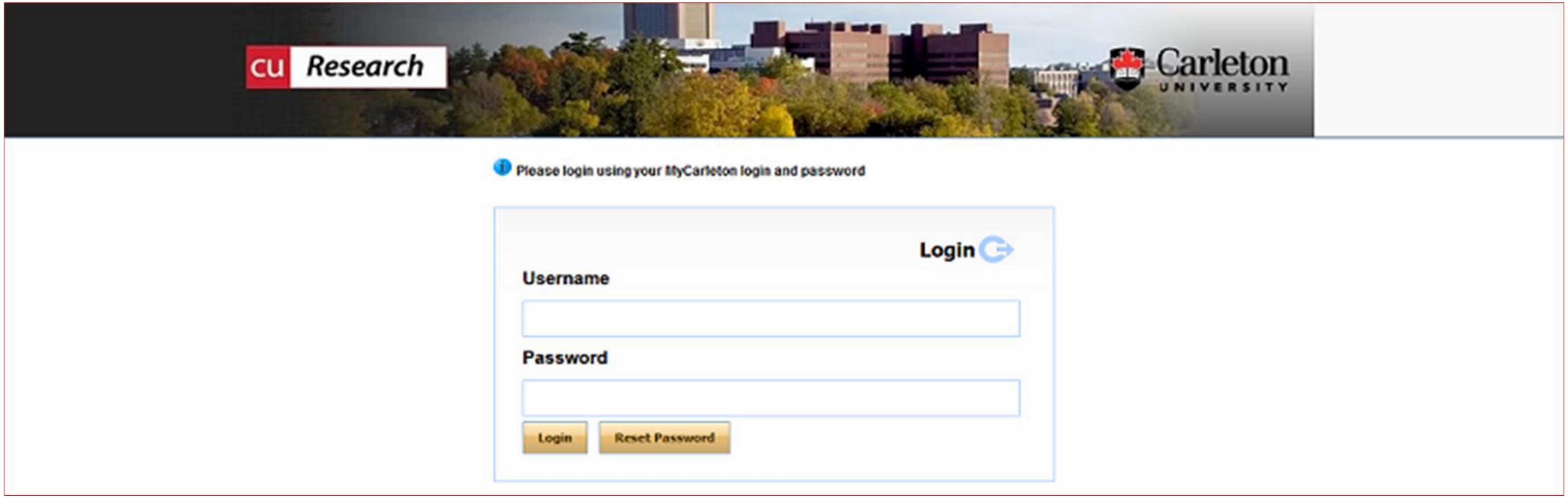
- a research information management system geared to the needs of Carleton Researchers
- allows you to keep track of all of your projects and applications online
- accessible from anywhere at any time
- signing authorities have access to the system and can sign applications electronically

More information is available on the CORIS website: http://www.carleton.ca/coris/curesearch/

Accessing cuResearch

How to Login:

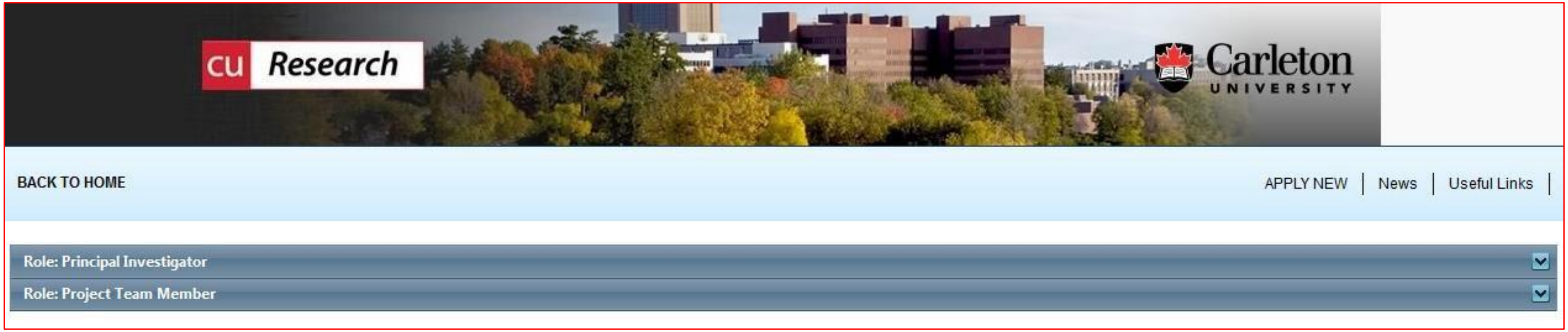
- visit the login page at https://ovpri.research.carleton.ca/Romeo.Researcher/



Homepage

Dissecting the homepage:

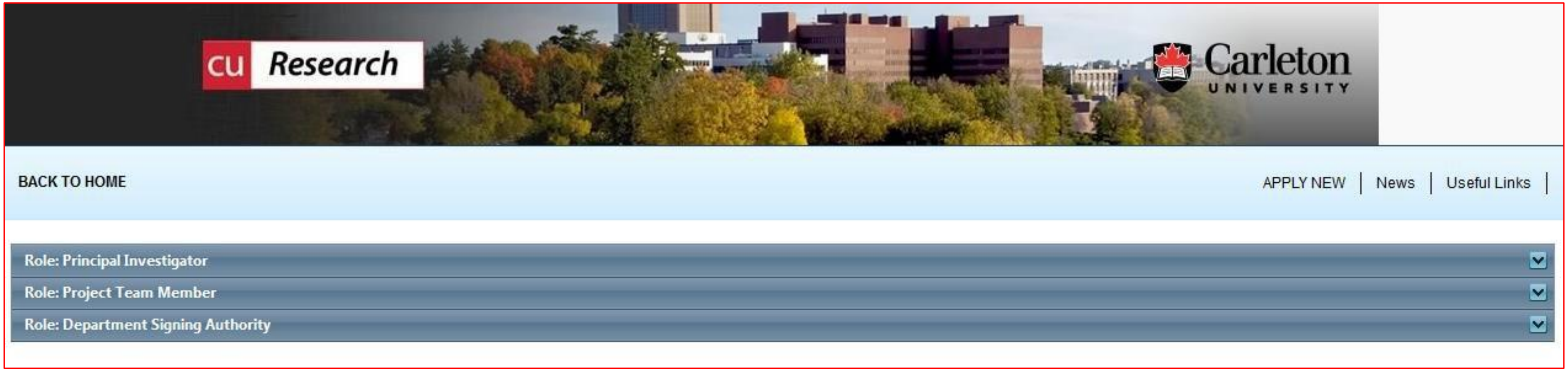
- all users have two roles (“Principal Investigator” and “Project Team Member”)
- depending on your role in a particular study, you are be able to access your files
- any individual affiliated with Carleton that has been added as a “Team Member” can view the application



Homepage

Roles:

- users with signing or review authority will see Department Signing Authority and/or Reviewer roles appear on their Homepage



Homepage

The “News” tab is a perfect way for CORIS to update Carleton researchers on announcements, tips and tricks, and additional information.

“Useful Links” provide quick access to forms and documents that are commonly used (e.g., CORIS, NSERC)

Homepage

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Applications:

- **Applications: Drafts** still in progress by user, not submitted for review (applications can be edited)
- **Applications: Requiring Attention** signing authority has returned for editing (applications can be edited)
- **Applications: Under Review** has been submitted by PI for review (applications can only be viewed)
- **Applications: Post Review** all active or closed approved (applications can only be viewed)
- **Applications: Withdrawn** PI no longer pursuing funding and withdraws the application
- **Events: Drafts** still in progress by user, not submitted for review (event can be edited)
- **Events: Requiring Attention** has returned for editing (event can be edited)
- **Reminders** applications that have a report due, requiring an event form, due within 30 days

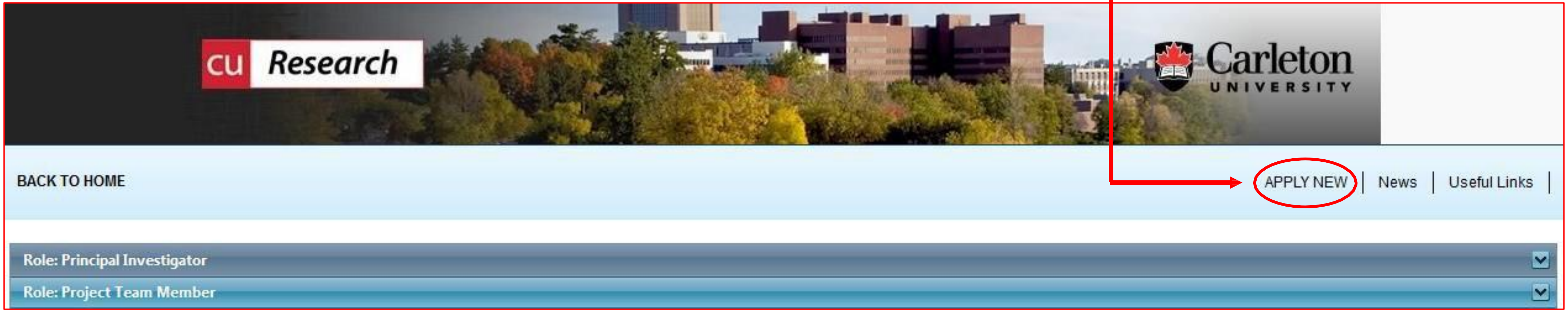
Role: Principal Investigator

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

Homepage

Starting a New Application

Step 1: Select "APPLY NEW" to access Application Forms



New Application Forms

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Step 2: Select the appropriate hyperlinked form to start the application.

New Application Forms

A. CORIS Awards

Application Name	Description	Status
Approval Form	This application replaces the old PDF "checklist". Carleton requires Authorization for all research funding administered through CORIS.	Open
(Carleton International) Visiting Scholars Request Form	This application is used to submit a request to host a visiting scholar for the purpose of conducting research at Carleton University.	Open

B. Animal Care

Application Name	Description	Status
Approval "in principle" request to the Animal Care Committee	This application is used to submit a request for a release of funds prior to submitting a full application to the ACC.	Open
Lab or Wildlife Protocol	Complete the Word protocol form found at http://carleton.ca/curo/ethics-and-compliance/animal-care/animal-research-resources/, and attach and submit through cuResearch. PLEASE NOTE that Safari Internet browser is not supported.	Open

Tip

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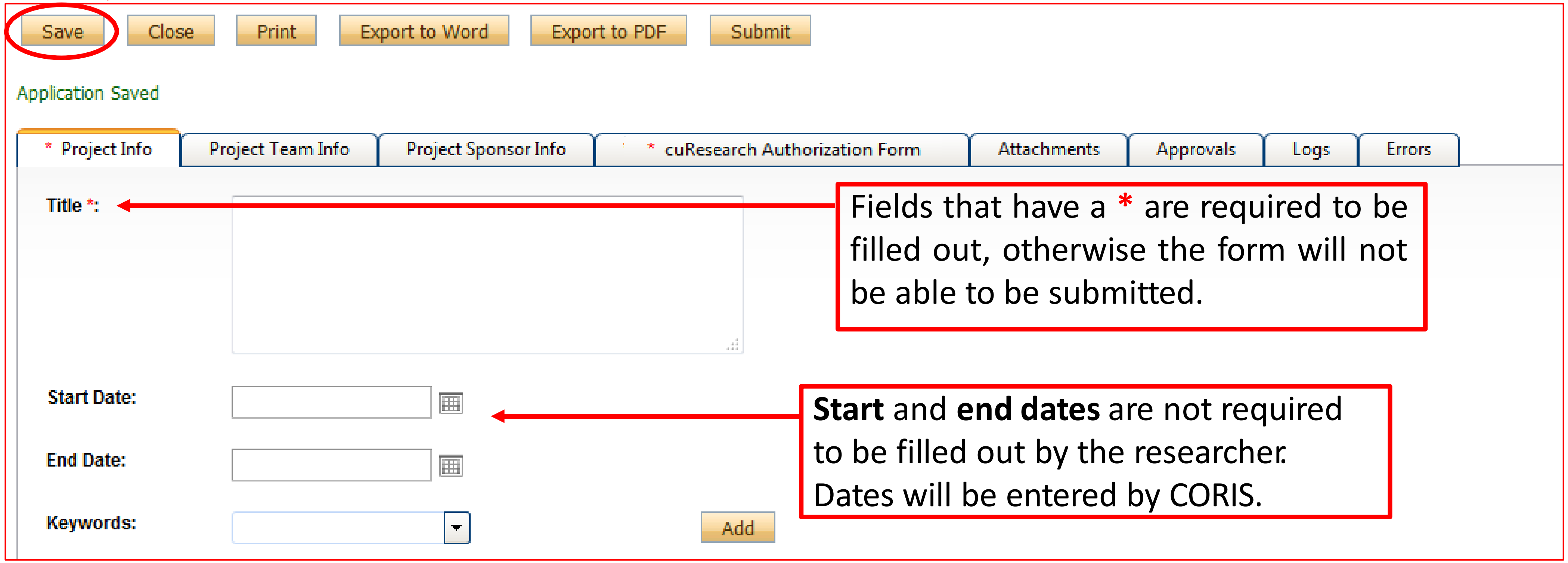
It is important to "**Save**" after completing each tab, because cuResearch does not automatically do so!



Fields that have a * are required to be filled out, otherwise the form will not be able to be submitted.

Start and **end dates** are not required to be filled out by the researcher. Dates will be entered by CORIS.

“Project Info” Tab

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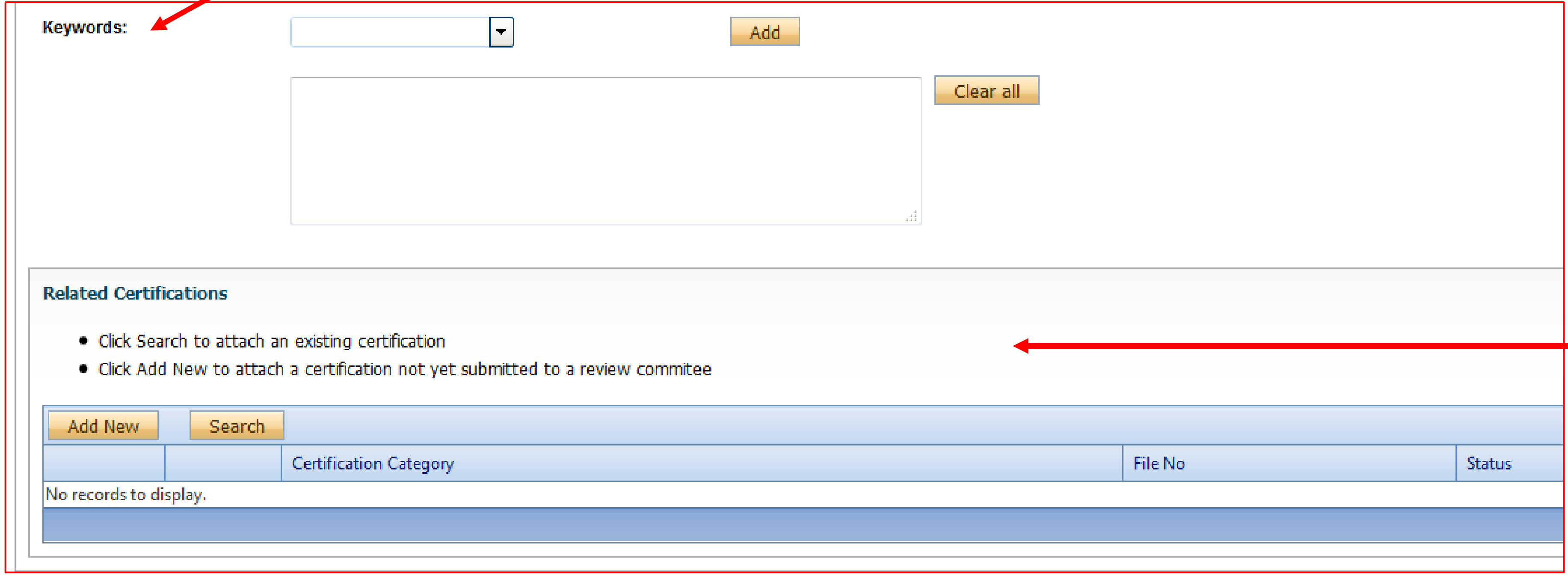
Keywords are not required, but researchers are encouraged to use this field to describe their project.



If your study requires Human Ethics, Biohazard, and/or Animal Care **Certification(s)** you must link them to your application, or make note of your intent to apply.

“Project Info” Tab

Certifications

Select “**Add New**” if you do not have any active certifications to indicate your intention of applying for one.

Related Certifications

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

Add New | Search

		Certification Category	File No	Status	Renewal Date	Notes
Edit	Delete	Human Ethics		Pending		This application requires human ethics certification. I will be submitting in my application CUREB shortly.

If you have already submitted your application for required certifications, or already have active applications, select “**Search**” to bring them up.

“Project Team Info” Tab

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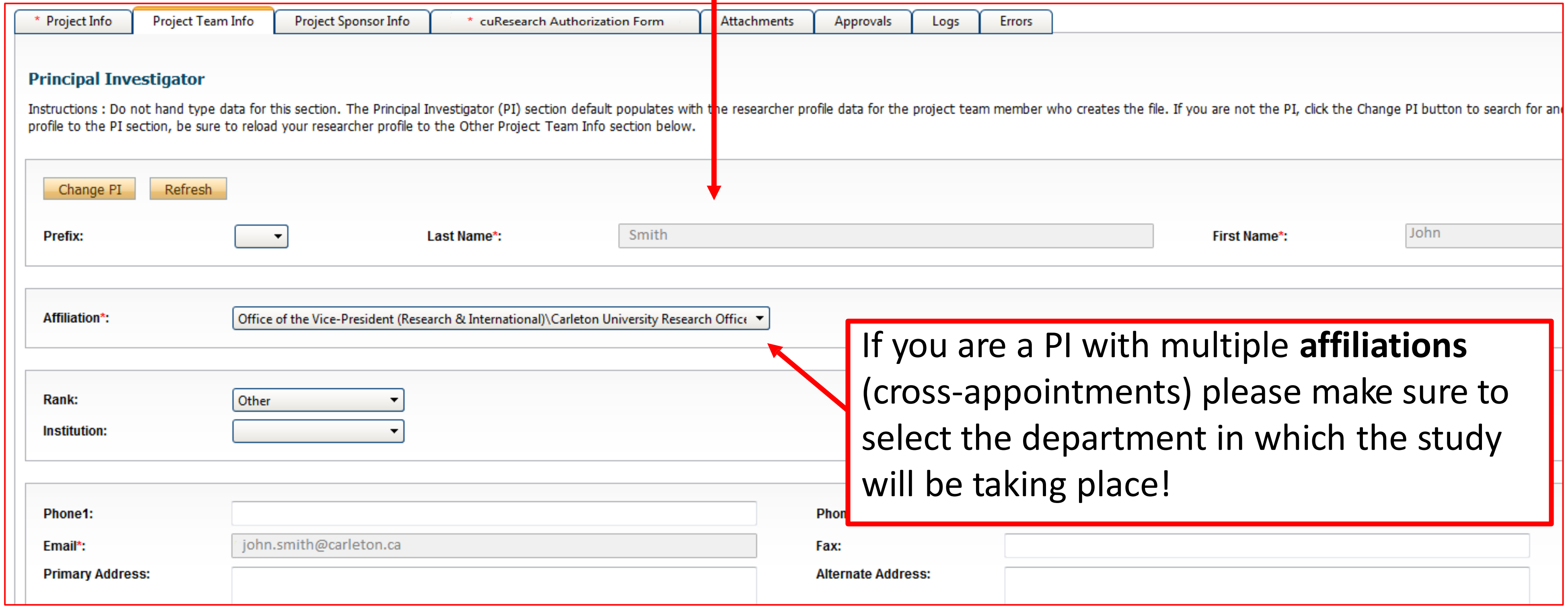
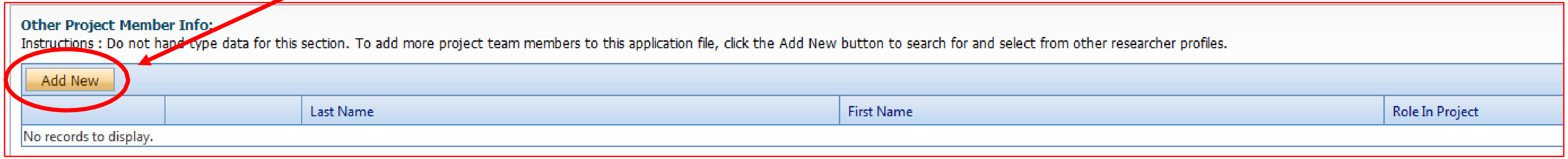
The Principal Investigator info is automatically filled out with the user’s information.

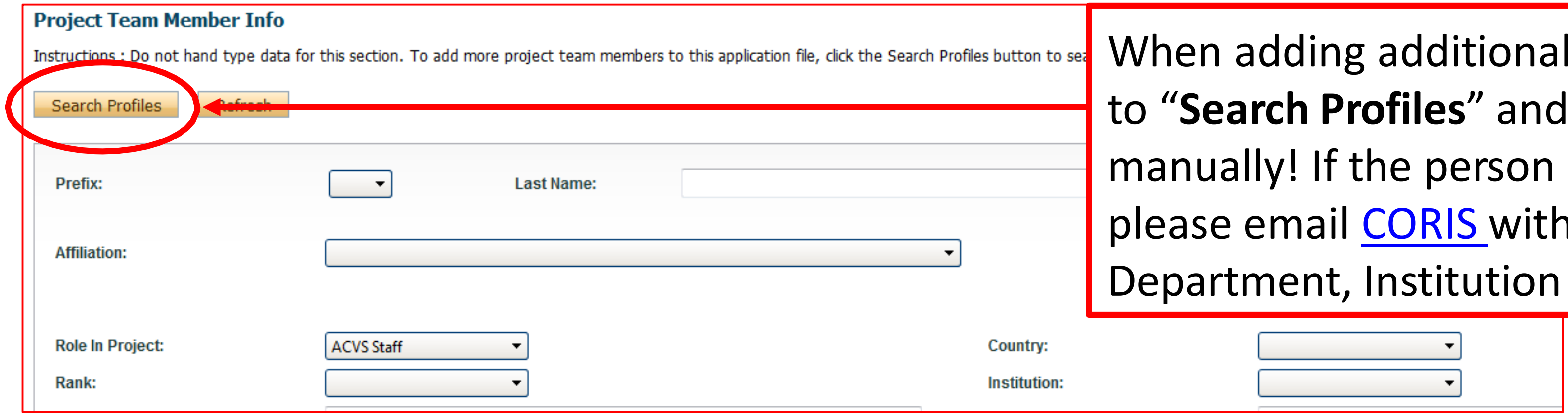


If you are a PI with multiple **affiliations** (cross-appointments) please make sure to select the department in which the study will be taking place!

“Project Team Info” Tab

At the bottom of the page you have the option to add other team members by selecting “**Add New**”.

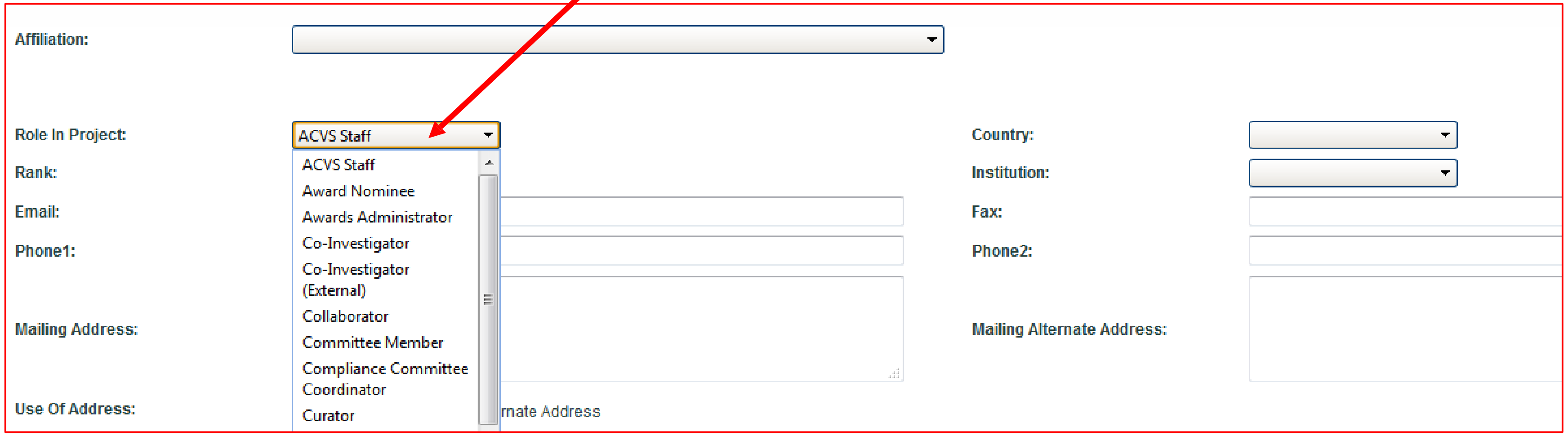




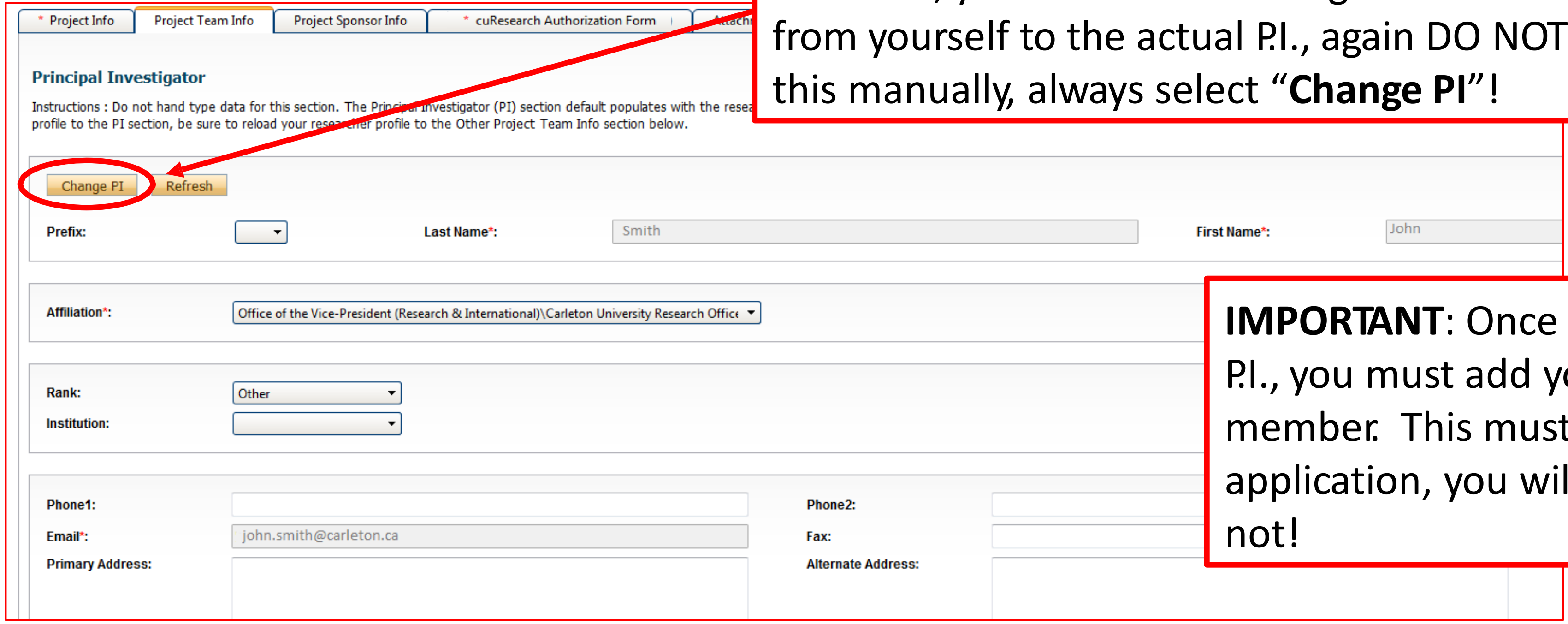
When adding additional team members it is important to “**Search Profiles**” and not to enter this information manually! If the person is not on the Investigator List please email CORIS with their (First/Last name, Department, Institution (if not Carleton), and E-Mail).

“Project Team Info” Tab

After selecting the team member you can then select their “Role In Project” from the drop down. You can add as many team members as you like!



“Project Team Info” Tab

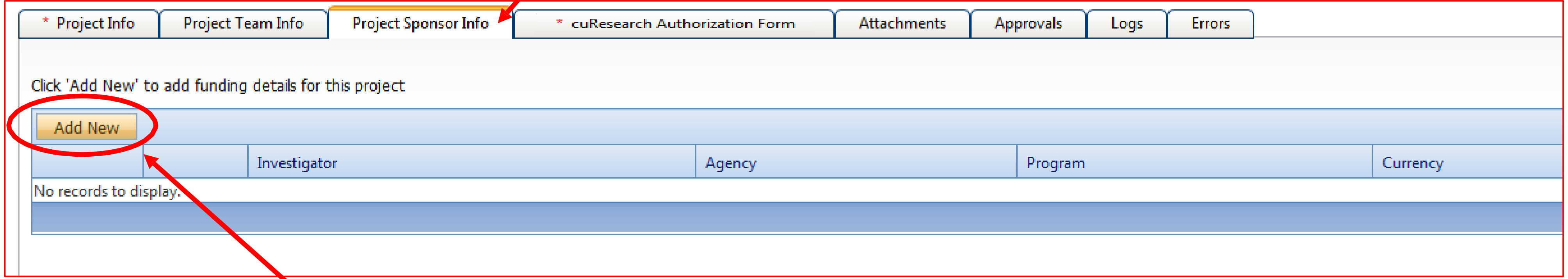


If you are completing the application on behalf of the P.I., you will have to change the P.I. role from yourself to the actual P.I., again DO NOT do this manually, always select “**Change PI**”!

IMPORTANT: Once you have transferred the role of the P.I., you must add yourself to the application as a team member. This must be done before you close the application, you will lose access to the application if not!

“Project Sponsor Info” Tab

The “Project Sponsor Info” Tab is intended for funding data such as the agency (“Sponsor”) and program, requested cash and/or in-kind, etc.



Select “**Add New**” to add a sponsor.

“Project Sponsor Info” Tab

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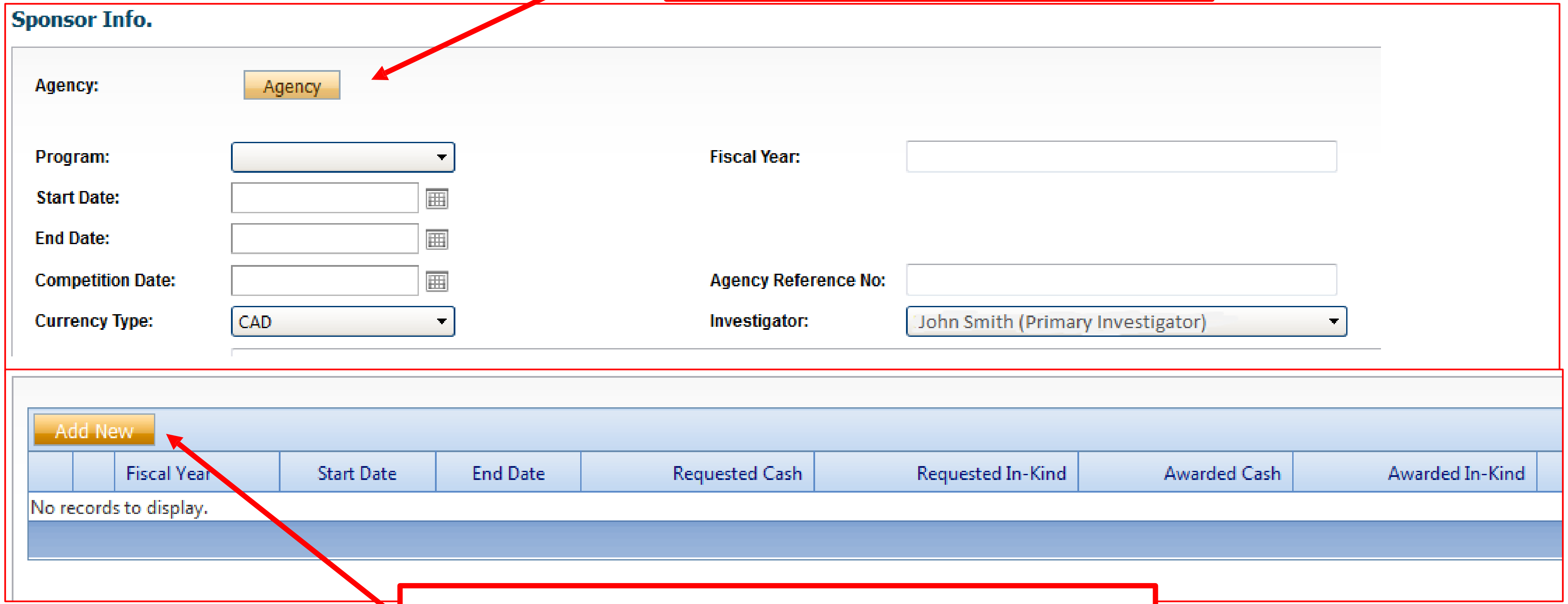
Select “**Agency**” to choose the funding agency



Select “**Add New**” to add disbursement(s).

“Project Sponsor Info” Tab

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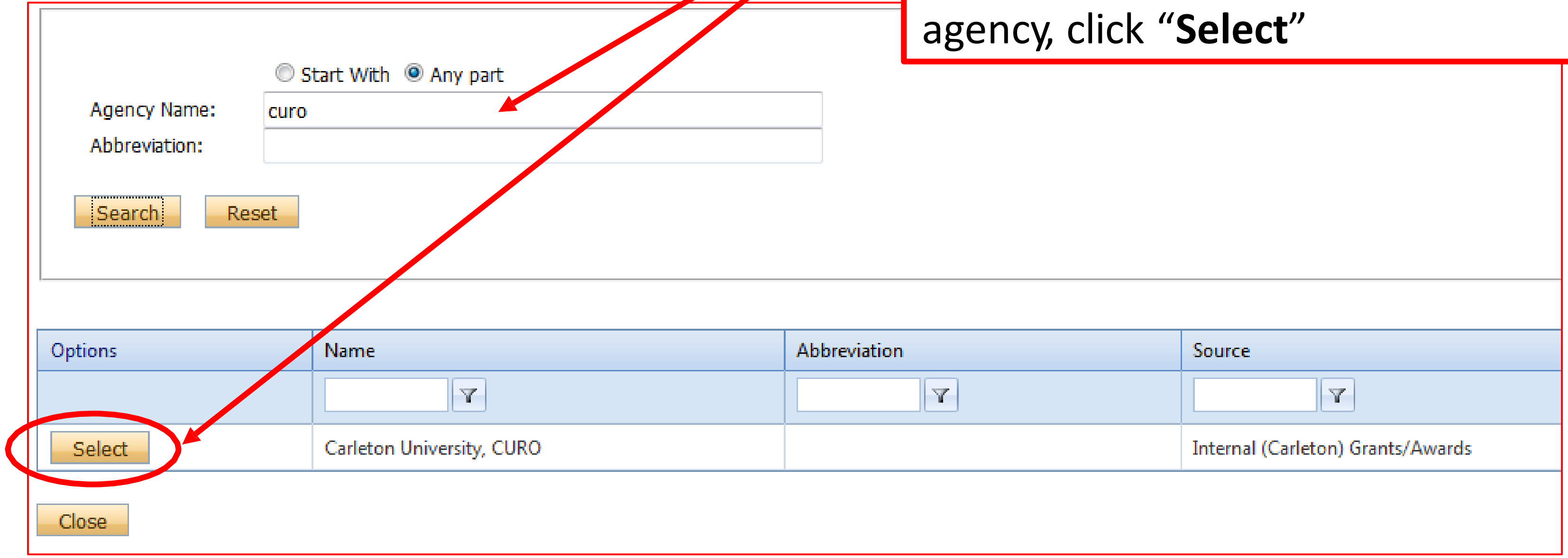
You can search the Agency by typing in the agency name, the abbreviation (e.g., NSERC, CORIS). Once you have found the desired agency, click “**Select**”



“Project Sponsor Info” Tab

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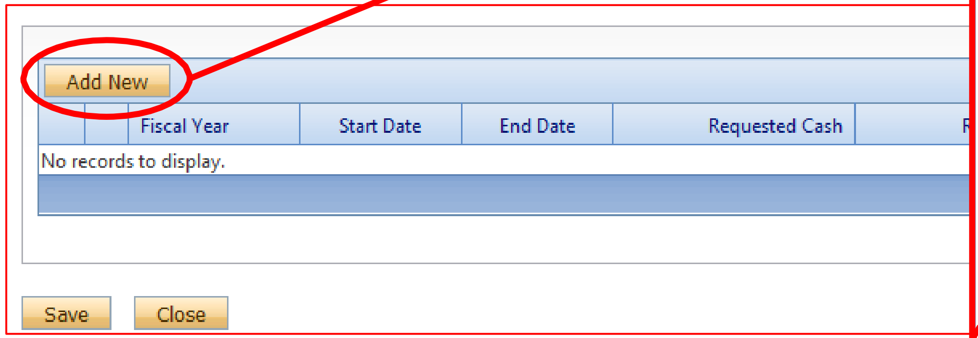
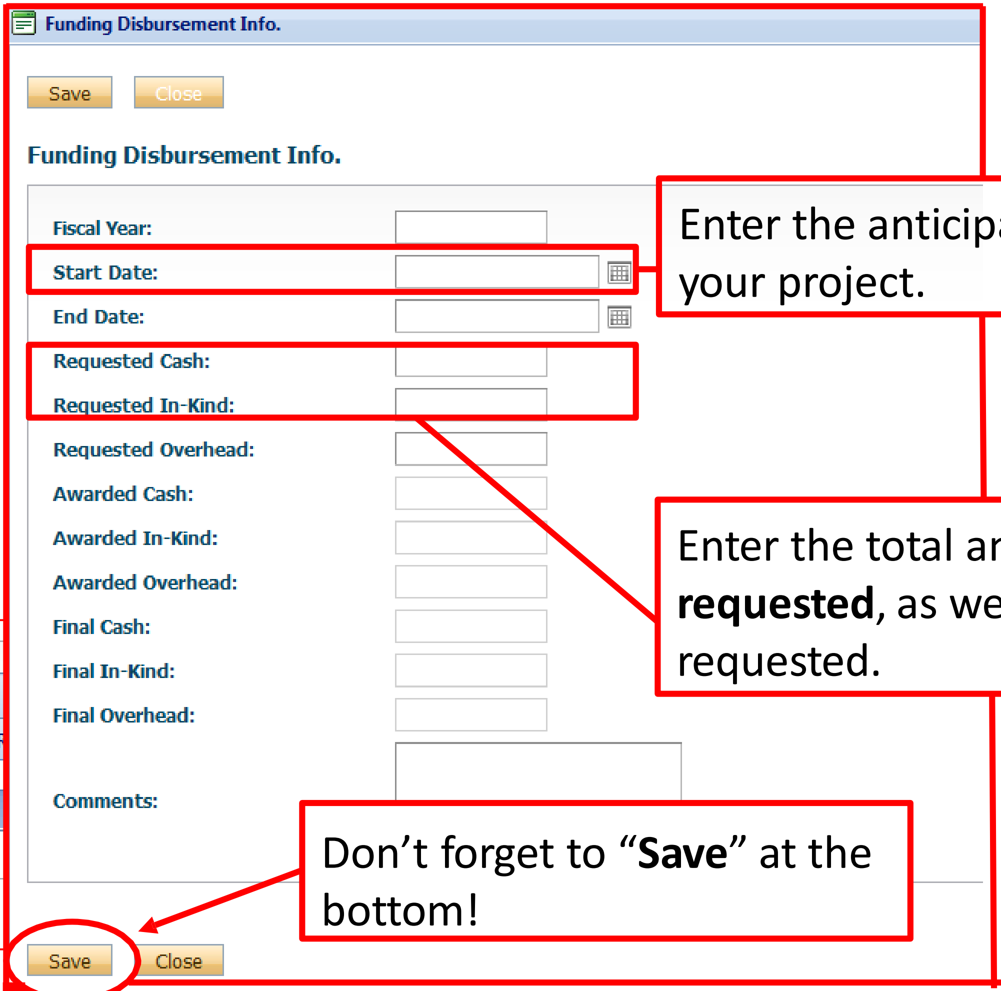
If you are unable to find the agency you are looking for, please return to the “**Sponsor Info**” screen and type the agency into the “**Comments**”.

After an Agency has been selected, you can select the **Program** in which you are applying to.

"Project Sponsor Info" Tab

You can now indicate the amount of funding you will be requesting by completing the "Funding Disbursement Info" screen. Select "**Add New**" at the bottom of the "Sponsor Info" screen.





Enter the anticipated **start date** of your project.

Enter the total amount of **cash requested**, as well as **in-kind** requested.

Don't forget to "**Save**" at the bottom!

“cuResearch Approval Form” Tab

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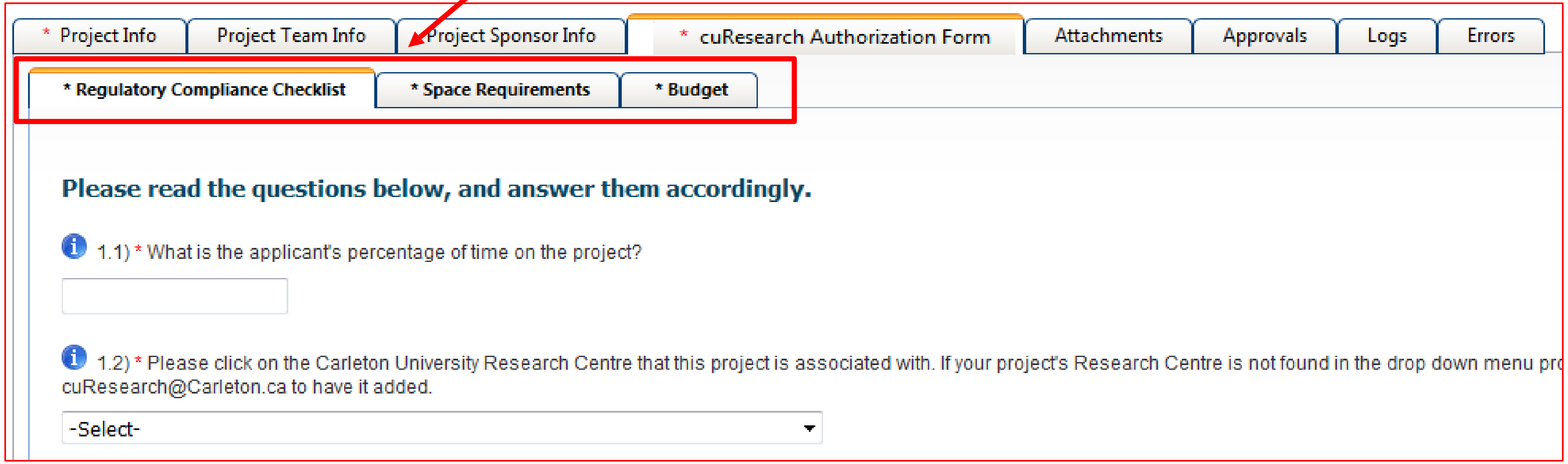
Within the “cuResearch Authorization Form (Funding Application)” tab you will notice **three sub-tabs**. All three of these questionnaire are to be completed.



“Attachments” Tab

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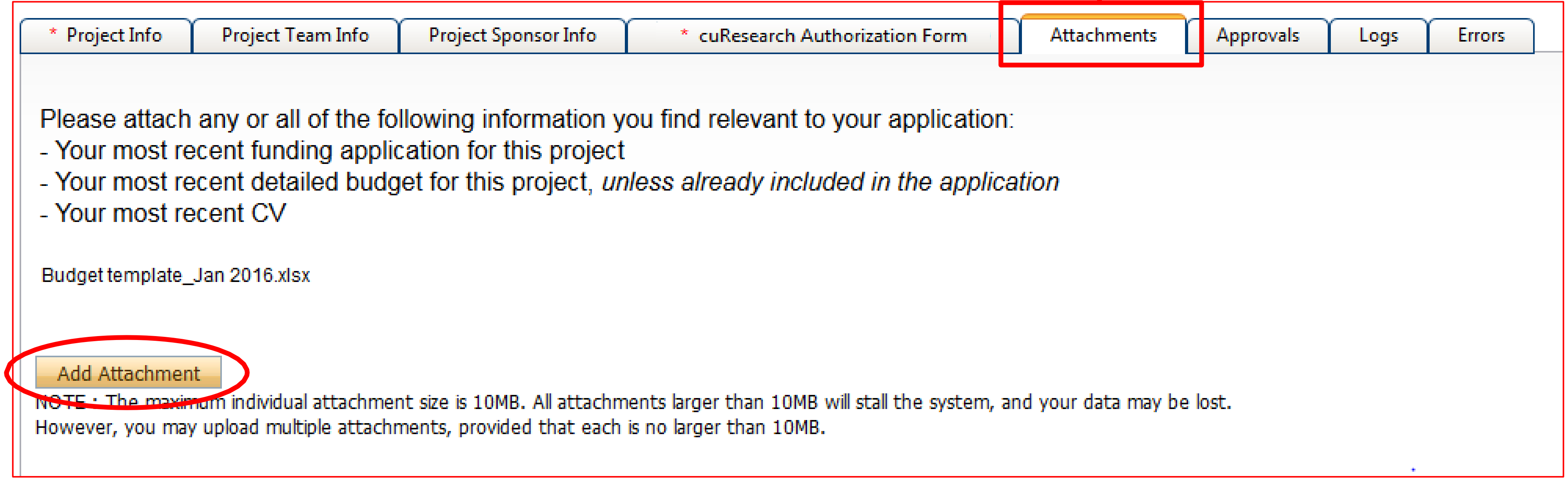
In this tab, researchers should upload any document(s) applicable (e.g., Research Proposal, Budget/Budget Justification). <u>Please note:</u> completing a budget template is not required. Users may upload several **attachments** (no larger than 10MB), and are encouraged to upload as “PDF”. “Word”, “Excel”, “JPEG” are also accepted.



“Attachments” Tab

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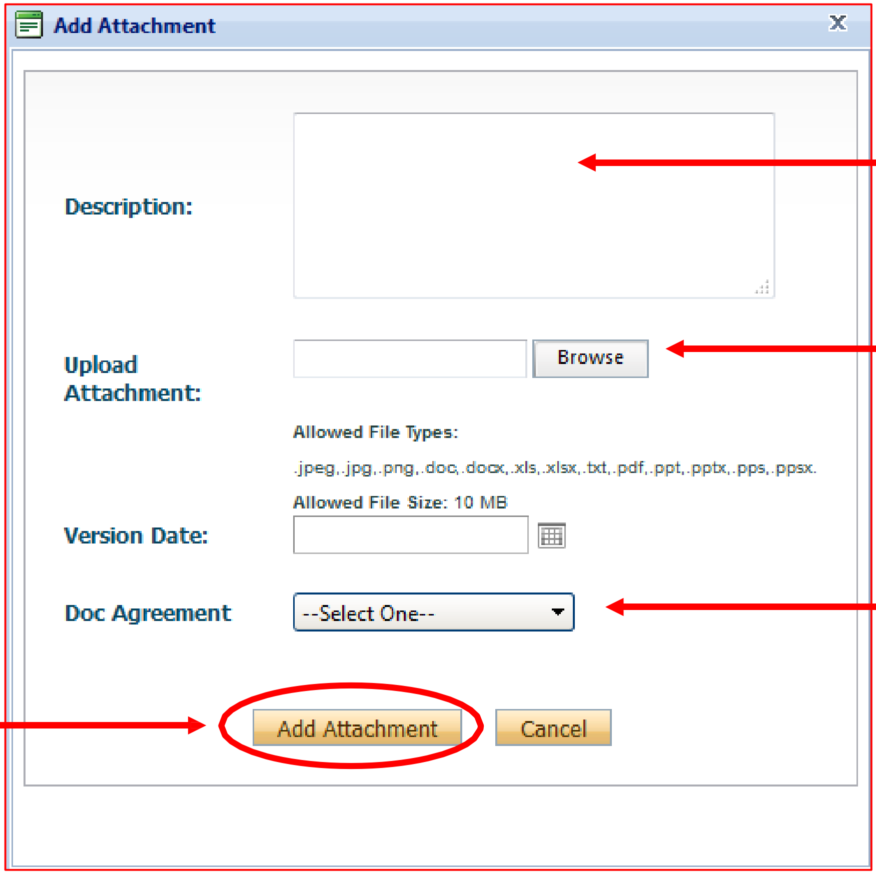


Include a brief **description** of the document (e.g., Research Proposal).

Select “**Browse**” to add the document from your computer.

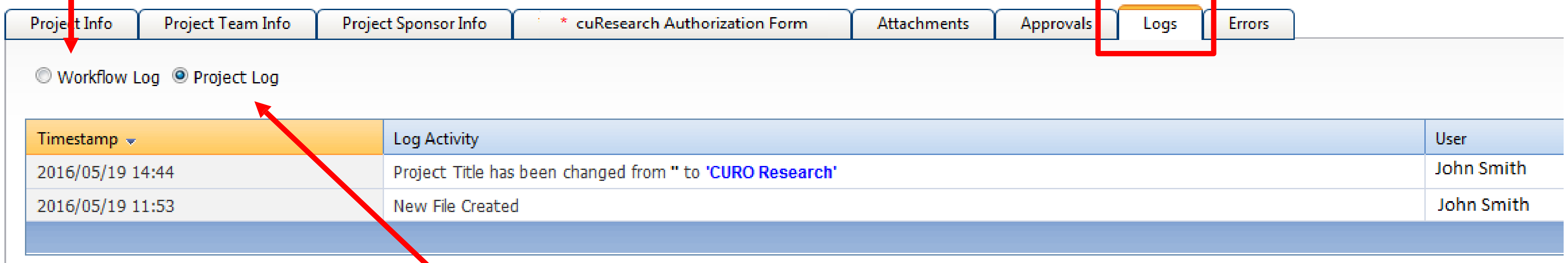
Select the type of document from the “**Doc/Agreement**” drop down menu.

After you have chosen the file you wish to attach select **“Add Attachment”**.

“Log” Tab

“**Workflow Log**” only starts to be logged after the application has been submitted.

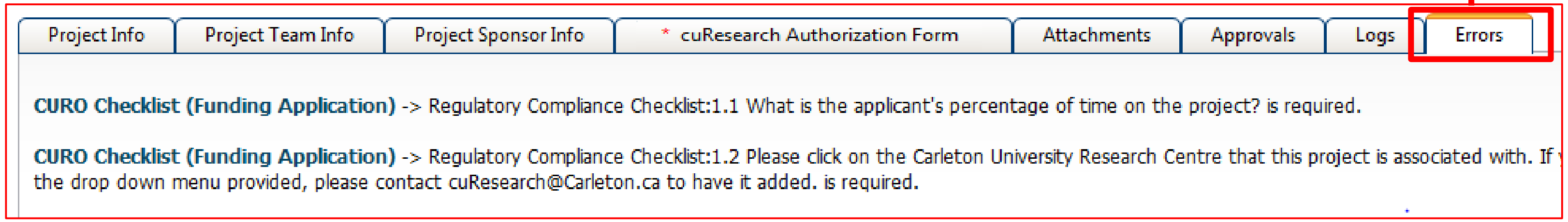
The “**Log**” tab is a way for users to keep track of activity within an application.



“**Project Log**” tracks and time stamps all actions made on the application.

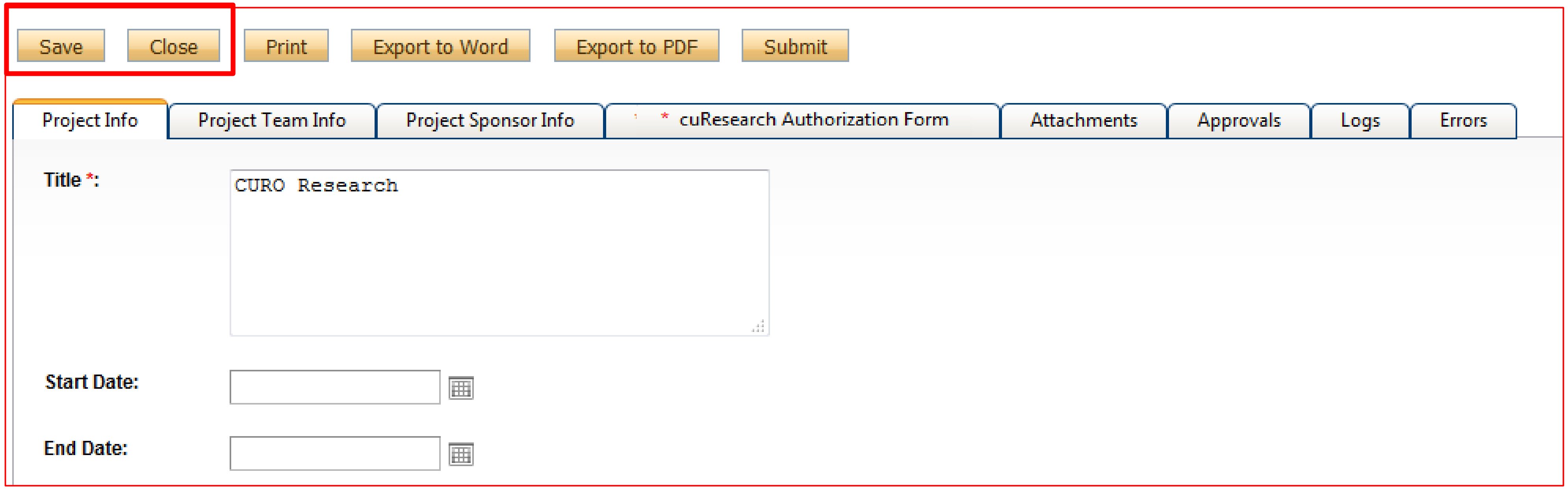
“Errors” Tab

The “**Errors**” tab keeps track of any required questions that were left unanswered. This tab disappears as soon as all questions have been answered.



Save and Close

At any point, the applicant may "**Save**" and "**Close**" the application. The information will be saved and can be found the next time the user logs in under "Applications (Saved – Not Submitted)".



Submitting

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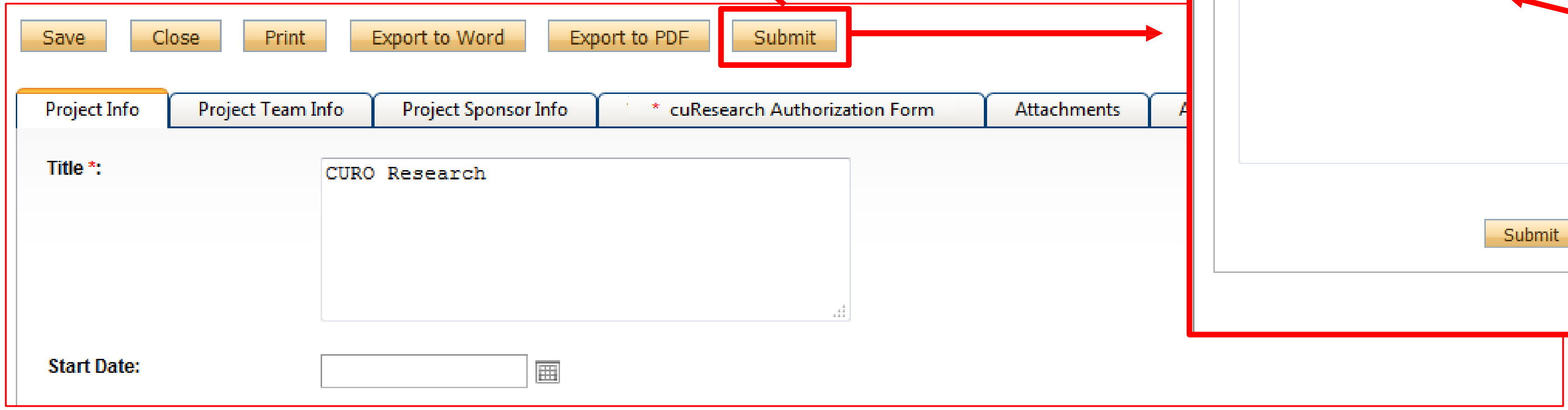
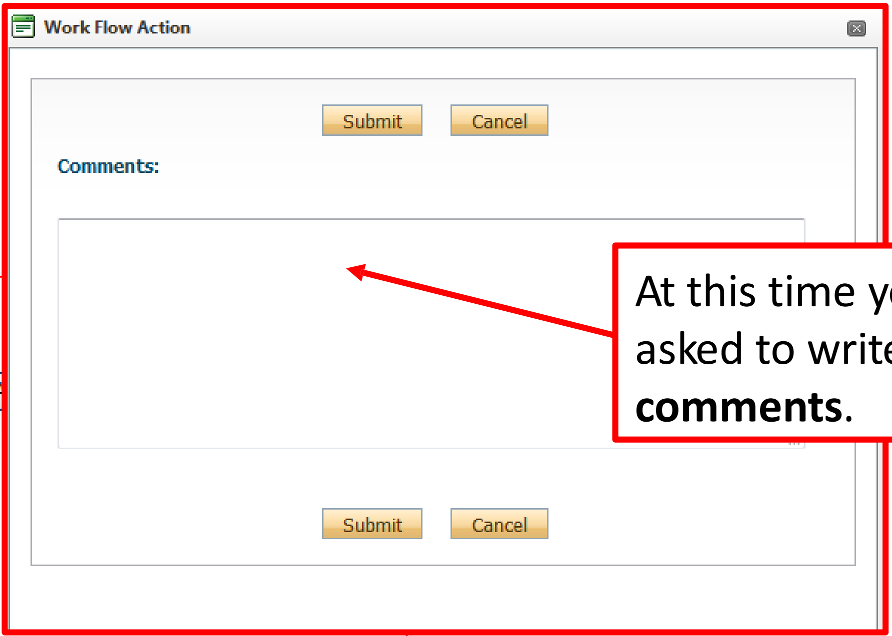
Once you have completed your application you can now press “**Submit**”





At this time you will be asked to write **comments**.

Shortly after submitting your application, you will receive an email confirming your submission. Your application has now been sent to the Department Signing Authority.

Have a question?

Contact the
Electronic Records Administrator at CORIS
613-520-2600, ext 6109
Email: richard.sokoloski@carleton.ca