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cuResearch

User's Manual

Rev. February 2024

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/cu-research/>

Accessing cuResearch



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How to Login:

- visit the login page at <https://ovpri.research.carleton.ca/Romeo.Researcher/>
 - contact the Electronic Records Administrator for any log-in problems
- <http://www.carleton.ca/coris/cu-research/>

A screenshot of the cuResearch login page. The header features the 'CU Research' logo on the left and the Carleton University logo on the right, set against a background image of a city skyline. Below the header, a message reads: 'Please login using your MyCarleton login and password'. The main login area contains a 'Username' field, a 'Password' field, and a 'Login' button with a right-pointing arrow. Below these fields are two smaller buttons: 'Login' and 'Reset Password'.

Homepage



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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 here
- 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/Faculty Signing Authority and/or Reviewer roles appear on their Homepage



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- **Applications: Withdrawn** PI no longer pursuing funding and withdraws the application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



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Starting a New Application

Step 1: Select “APPLY NEW” to access Application Forms

The screenshot shows the Carleton University Research homepage. At the top left is the 'CU Research' logo. The background features a photograph of a campus building. On the right side, there is a Carleton University logo. Below the main header, there is a light blue navigation bar containing the text 'BACK TO HOME' on the left and a menu on the right. The menu includes 'APPLY NEW' (which is circled in red), 'News', and 'Useful Links'. A red arrow points from the 'Step 1' text box to the 'APPLY NEW' link. Below the navigation bar, there are two dropdown menus for role selection: 'Role: Principal Investigator' and 'Role: Project Team Member', each with a downward arrow icon.

New Application Forms



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

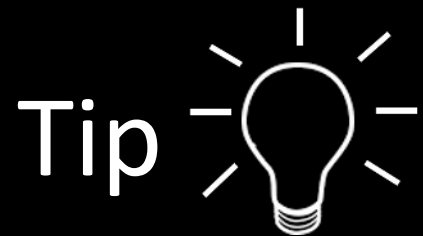
New Application Forms

A. Research Funding

Application Name	Description	Status
Approval Form	This application replaces the old PDF "checklist". Carleton requires Authorization for all research funding administered through CORIS.	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!

Save Close Print Export to Word Export to PDF Submit Withdraw

* Project Info Project Team Info Project Sponsor Info * Approval Form Attachments Approvals Logs Errors

Title *:

Start Date: 

End Date: 

Keywords: 

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.

Keywords:

Add

Clear all

Related Certifications

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

Add New

Search

Certification Category

File No

Status

No records to display.

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



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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 committee

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.

* Project Info **Project Team Info** Project Sponsor Info * Approval Form Attachments Approvals Logs Errors

Principal Investigator

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.

Prefix: Last Name*: First Name*:

Affiliation*:

Rank: Institution:

Phone1: Phone2:

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



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

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.			

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 other researcher profiles.

Search Profiles **Refresh**

Prefix: Last Name:

Affiliation:

Role In Project: Country:

Rank: Institution:

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



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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!

Affiliation:			
Role In Project:	ACVS Staff	Country:	
Rank:	ACVS Staff	Institution:	
Email:	Award Nominee	Fax:	
Phone1:	Awards Administrator	Phone2:	
	Co-Investigator		
	Co-Investigator (External)		
Mailing Address:	Collaborator	Mailing Alternate Address:	
	Committee Member		
	Compliance Committee		
Use Of Address:	Coordinator		
	Curator		

“Project Team Info” Tab



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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**”!

Project Info | **Project Team Info** | Project Sponsor Info | cuResearch Authorization Form | Attachments

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile to the PI section, be sure to reload your 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:

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



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

* Project Info Project Team Info **Project Sponsor Info** * Approval Form Attachments Approvals Logs Errors

Click Add New to add funder and per fiscal year budget details for this project.

Add New

	Investigator	Agency	Program
No records to display.			

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

“Project Sponsor Info” Tab



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

Sponsor Info.

Agency:

Program:

Start Date:

End Date:

Competition Date:

Currency Type:

Fiscal Year:

Agency Reference No:

Investigator:

	Fiscal Year	Start Date	End Date	Requested Cash	Requested In-Kind	Awarded Cash	Awarded In-Kind
No records to display.							

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**”

Agency Name: ☐ Start With ☒ Any part

Agency Name:

Abbreviation:

Options	Name	Abbreviation	Source
Select	Y	Y	Y
	Carleton University, CURO		Internal (Carleton) Grants/Awards

“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**”.

Sponsor Info.

Agency:	Agency
Program:	
Start Date:	
End Date:	
Competition Date:	
Currency Type:	CAD
Agency Reference No:	
Investigator:	Lisa Saunders (Primary Investigator)
Comments:	

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

“Project Sponsor Info” Tab



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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.

The screenshot shows the 'Sponsor Info' screen with a table header containing 'Fiscal Year', 'Start Date', 'End Date', and 'Requested Cash'. Below the header, it says 'No records to display.' At the bottom left, the 'Add New' button is circled in red. At the bottom right, there are 'Save' and 'Close' buttons.

The screenshot shows the 'Funding Disbursement Info' screen. At the top, there are 'Save' and 'Close' buttons. Below them is the title 'Funding Disbursement Info.' followed by several input fields: 'Fiscal Year:', 'Start Date:', 'End Date:', 'Requested Cash:', 'Requested In-Kind:', 'Requested Overhead:', 'Awarded Cash:', 'Awarded In-Kind:', 'Awarded Overhead:', 'Final Cash:', 'Final In-Kind:', and 'Final Overhead:'. At the bottom, there is a 'Comments:' text area and another set of 'Save' and 'Close' buttons. The 'Save' button at the bottom is circled in red. Red callout boxes provide instructions: one points to the 'Start Date' field with the text 'Enter the anticipated **start date** of your project.', another points to the 'Requested Cash' and 'Requested In-Kind' fields with the text 'Enter the total amount of **cash requested**, as well as **in-kind** requested.', and a third points to the bottom 'Save' button with the text 'Don't forget to “**Save**” at the bottom!'.

“cuResearch Approval Form” Tab



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Within the “Approval Form (Funding Application)” tab you will notice three sub-tabs. Please complete the questionnaires under each tab.

* Project Info Project Team Info Project Sponsor Info * Approval Form Attachments Approvals Logs Errors

* Regulatory Compliance * Space and Budget * Research Security

Please read the questions below, and answer them accordingly.

i 1.1) * If this project is associated with a Carleton Research Centre, please select it from the drop-down menu. If not, please select N/A.
Please select the relevant research centre from the drop down menu provided.

-Select- ▼

i 1.2) * Could this project require security clearance?
For more information, please see: <https://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>

☐ Yes
☐ No

“Attachments” Tab



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In this tab, researchers should upload any document(s) applicable (e.g., Research Proposal, Budget/Budget Justification). Please note: 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.

* Project Info	Project Team Info	Project Sponsor Info	* Approval Form	Attachments	Approvals	Logs	Errors
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Please attach any of the following information you find **relevant** to your application (e.g., your most recent application, budget, and/or CV) for Chair/Associate Dean (Research) approval.

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.

“Attachments” Tab



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Add Attachment

Description:

Upload Attachment:

Allowed File Types:
.jpeg, .jpg, .png, .doc, .docx, .xls, .xlsx, .bt, .pdf, .ppt, .pptx, .pps, .ppsx

Allowed File Size: 10 MB

Version Date:

Doc Agreement: --Select One--

Add Attachment Cancel

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



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“**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 Info Project Team Info Project Sponsor Info * Approval Form Attachments Approvals **Logs** Errors

☐ Application Workflow Log ☒ Application Log ☐ Shared Communications

Timestamp ▾	Log Activity	User
2022/01/18 13:20	New File Created	Richard Sokoloski

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

“Errors” Tab



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

* Project Info	Project Team Info	Project Sponsor Info	* Approval Form	Attachments	Approvals	Logs	Errors
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Project Info ->Project Title is required.

Approval Form -> Regulatory Compliance Checklist:1.1 If this project is associated with a Carleton University Research Centre, please select it from the dro

Save and Close



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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)”.

The screenshot shows a web application interface. At the top, there is a row of buttons: 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', 'Submit', and 'Withdraw'. The 'Save' and 'Close' buttons are highlighted with a red box, and a red arrow points from the text box above to the 'Close' button. Below the buttons is a tabbed interface with tabs: '* Project Info', 'Project Team Info', 'Project Sponsor Info', '* Approval Form', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The '* Project Info' tab is active. Inside this tab, there is a form with two main sections. The first section is labeled 'Title *:' and contains a large text input area. The second section is labeled 'Start Date:' and contains a date input field with a calendar icon to its right.

Submitting



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

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

* Project Info Project Team Info Project Sponsor Info * Approval Form Attachments Approvals

Title *:

Start Date: 

Work Flow Action

Submit Cancel

Comments:

Submit Cancel

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

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



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Have a question?

Contact the
Electronic Records Administrator at CORIS

Email: richard.sokoloski@carleton.ca