

RESEARCH MANAGEMENT SYSTEM (RMS)

What Is RMS and What Does it Mean for You?

What is RMS?

The [Research Management System \(RMS\)](#) is a new platform that manages the submission, project set-up and publication phases of research grants and contracts.

Throughout the Grants and Contracts life-cycle, RMS interfaces with other UCalgary systems, such as IRISS and PeopleSoft, to provide a seamless process for grants and awards management, eliminating re-keying of data and heightened transparency into the status of applications at any time.

The implementation of RMS is a multi-year project, co-sponsored by the Vice-President (Research) and the Vice-President (Finances & Services) at the University of Calgary. RMS will be rolled out across several releases, with increased functionality at each release. Release 1 will focus on a select number of funding competitions, and went live on June 18, 2019. The RMS Project Team expects that all releases will be complete by September 2020.

What Does it Mean for You?

RMS will help to reduce administrative burdens, leaving researchers to focus more time on research than management. In Release 1, a variety of smaller single sponsor Competitions will be managed using the new RMS system.

Notable changes include:

- Replacement of current paper-based RFAA form and submission process for Grants and Contracts
- Academic approval will be captured and routed electronically
- Project set-up in PeopleSoft will be automated
- Validation and curation of publications will be automated

Are you a Researcher?
Do you apply for Grants
and funding
opportunities?

- or -

Do you provide
administrative and/or
research support to a
Researcher?

If so...

**THIS INFORMATION
IS FOR YOU!**



Release 1 Competitions:

- Canadian Blood Services
- Weston Brain Institute: Rapid Response and Transformational Research for Alzheimer’s and Related Diseases (full application only)
- SSHRC: Connection
- The Arthritis Society – Strategic Operating Grants
- Heart & Stroke Foundation: Grant in Aid
- Alberta Innovates: Strategic Networking & Development
- Alberta Innovates – Cancer Screening Research and Innovation Opportunity: Stream II – Solution Implementation
- SSHRC Knowledge Synthesis Grant: Informing Best Practices in Environmental and Impact Assessment
- CIHR Network Catalyst Grants

Note: Other competitions may be included in Release 1, pending posting date and feasibility. The current list can be found [here](#).

If you are planning to apply to any Competitions included in Release 1, you will need to prepare and submit your application for approval using the new RMS system.

Please contact the RMS Project Team at as soon as possible to arrange training: rms@ucalgary.ca.

Please note that paper RFAA forms will not be accepted for Release 1 Competitions.



RMS: How will it impact the Faculty?

NOW → FUTURE	
<p>Manual Input Fill out paper form Gather signatures</p>	<p>Online Input Online form Automated approvals, online signatures</p>
<p>Manual Tracking Phone calls, in-person, emails Several people involved, location un-known</p>	<p>Workflow Transparency Application status tracking Automatic notifications as it moves through approvals</p>
<p>Manual Data Entry and Re-Entry Email, fill out forms Personally keep track of data for publications/\$</p>	<p>Connected (Interfaced) Link to specific ethics certificates Link to publications to grant funding</p>
<p>Manual process Phone calls, in-person, email Manually send info</p>	<p>Customizable Add and remove delegates and approvers Notifications based on status</p>
<p>Manual Project Set-up Slow</p>	<p>Customizable Add and remove delegates and approvers Notifications based on status</p>
<p>Disparate System View Check files, find emails Time consuming, no linkages</p>	<p>Consolidated View One-stop shop for applications See full history: closed, open, pending, not awarded</p>

Figure 1: Comparison Chart

Navigating the New RMS System: RMS Pre-Award Learning Guide

The RMS Pre-Award Learning Guide includes detailed information and step-by-step instructions on how to navigate and use the new RMS system.

The Learning Guide can be accessed [here](#).

What You Need To Access RMS

UCalgary MFA and VPN

UCalgary is embarking on enhancing IT security through the deployment of **MFA** (Multi-Factor Authentication) and **VPN** (Virtual Private Network) to secure their systems and data where appropriate. Recent security assessments at the University support this approach, and together, these two technologies will provide the required security to meet the demands of our research intensive and rapidly growing university.

MFA and VPN are being now, so RMS can meet the recently identified security requirements at the University.

MFA will be required to access RMS under any circumstances.

VPN will be required to access RMS and other UCalgary information systems from any off-campus location, including AHS buildings and sites.

If you are only accessing RMS from a UCalgary office, you will not need VPN. Researchers with offices in the Foothills Campus buildings (HMRB, HSC, HRIC, and TRW) are encouraged to connect their computers via wired internet connection to the UCalgary network to ensure easy access to RMS.

What is Multi-Factor Authentication?

Multi-Factor Authentication protects your RMS and Office 365 applications, including mail, calendar, OneDrive, and Skype for Business, by providing enhanced security to your logging in process.

Once MFA is enabled and you are accessing one of these services, you will be prompted for your UCalgary password, and then an additional authentication method will be required. This authentication method will be sent to the personal device of your choice.

You will be able to choose how you want to receive your MFA notification, whether it be by an app notification on your smart device, receiving a text message, or getting an automated phone call to your desk or mobile phone.

How to Enable MFA

[Getting Started with MFA \(Video\)](#)

[Detailed Step-by-Step Guide](#)

You can set up Multi-Factor Authentication (MFA) yourself by following these steps:

1. [Activate multi-factor authentication](#)
2. Set up one or more ways to receive your multi-factor authentication:
 - a. [Setup the Mobile App](#)
(Recommended)
 - b. [Setup authentication by mobile phone call or text](#)
 - c. [Setup authentication through your Office Phone](#)
3. Set up your email on all your devices with multi-factor authentication:
 - a. [Outlook \(Desktop or Mobile\)](#)
 - b. [Other email applications \(e.g. Apple Mail, Android Mail, Thunderbird\)](#)

Post setup: Add or change multi-factor authentication options:

- [Add or change your phone options](#)
- [Create or delete app passwords for your devices that don't use Outlook](#)

For more information, visit:
www.ucalgary.ca/mfa

What is a Virtual Private Network (VPN)?

FortiClient VPN is the virtual private network (VPN) used by the University of Calgary. FortiClient VPN provides a safe way to connect to the University of Calgary network from any off-campus location.

Installing FortiClient VPN

Detailed Step-by-Step Guide

Note: You will require Administrator Access to install the program on your computer. If you are installing FortiClient on an AHS computer, you will need to contact AHS IT for assistance.

1. Download the correct file for your operating system from <https://iac01.ucalgary.ca/SDSWeb/>
 - Note: you will need to log in using your UCalgary IT Username and Password
2. Open FortiClient Install ReadMe.pdf for detailed installation instructions.
3. Run the Installation program: **FortiClientOnlineInstaller**.
4. You will need to accept the terms of the license agreement to install and use the software.
5. Select **VPN Only** setup type.
6. Select the default Destination Folder for the software installation.
7. Click **Install** to begin the installation.
8. Click **Finish** to exit the program installation Setup Wizard.

Configuring FortiClient VPN

Configuring General VPN Step-by-Step Guides:

- [How to Connect on Windows](#)
- [How to Connect on Mac OS](#)
- [How to Connect on an iPhone or iPad](#)
- [How to Connect on an Android Phone](#)

MFA and VPN Frequently Asked Questions

1. Do I have to get MFA and VPN?

Yes. MFA will be required to access RMS under any circumstances. VPN will be required to access RMS from any off-campus location, including from AHS buildings and sites. At the Foothills Medical Centre, offices in the HMRB, HSC, HRIC, and TRW Buildings (Foothills Campus) are considered on-campus. If you are only accessing RMS on-campus, you will not need VPN.

2. What if I am already using MFA and VPN?

If you already have MFA and FortiClient VPN, there is nothing additional for you to do as you begin using RMS.

3. What buildings at the Foothills Medical Centre are considered ‘on-campus’ and ‘off-campus’? What about the other hospital sites in Calgary?

The Foothills Campus, which consists of the Heritage Medical Research Building (HMRB), Health Sciences Centre (HSC), Health Research Innovation Centre (HRIC) and the Teaching Research and Wellness (TRW) Buildings, is ‘on-campus’, so computers connected to the UCalgary network will not need VPN to access RMS. Researchers and staff are encouraged to use wired internet connections when accessing RMS.

The AHS buildings on the Foothills Medical Centre site, including the Main Building (FMC), North Tower (NT), South Tower (ST), Special Services Building (SSB), Tom Baker Cancer Centre (TBCC), and McCaig Tower (MT) are off-campus. Researchers and staff in these buildings will need both MFA and VPN to access RMS.

The other Calgary-Zone hospital sites, including the Alberta Children’s Hospital (ACH), Peter Lougheed Centre (PLC), Rockyview General Hospital (RGH), Richmond Road Diagnostic and Treatment Centre (RRDTC) and South Health Campus (SHC) are off-campus. Researchers and staff at these sites will need both MFA and VPN to access RMS.

4. I already have NetMotion installed on my computer. Do I still need to install FortiClient VPN to access RMS from off-campus?

Yes. You will still need to install FortiClient VPN in order to access the RMS system off-campus.

NetMotion is the mobility client and virtual private network (VPN) used by Alberta Health Services to access the AHS network from an off-site location. It cannot be used to access the UCalgary network.

5. Why is UCalgary making us do this?

MFA and VPN are important security tools. By installing them, your access to RMS and the information within RMS will be secure.

6. I have heard that getting MFA and VPN takes a long time. How can I speed that up?

Please ensure that you have **at least an hour** of your time available for MFA and VPN set-up. Support is available during the hours of 8 am – 5 pm Monday to Friday, or 10 am – 2 pm Saturday and Sunday, in case you need assistance from the IT Support Centre. While this does take up some of your valuable time, the reward is knowing your data and information are secure and accessible.

7. I cannot install this myself. Who can help me?

If you have any questions or concerns, please contact the IT Support Centre. Live chat at ucalgary.ca/it, phone 403.220.5555, email itsupport@ucalgary.ca or visit 773 Math Science on the main campus or G204 Health Science Centre on Foothills Campus.

Get Support

RMS support is available Monday-Friday, 8:30 am – 12:00 pm and 1:00 pm – 4:30 pm

Integrated Service Centre (ISC)

For general help using RMS, including with tasks such as:

- Navigation
- Filtering
- Finding & connecting relevant resources

Contact the Integrated Services Centre via email, phone, or in person:

rmshelp@ucalgary.ca

403.210.7900

FOOTHILLS CAMPUS (Health Sciences Centre G204)

MAIN CAMPUS (Math Sciences 773)

RMS Project Team Helpline

For a limited time, contact a subject matter expert from the RMS project team for training or in-depth support, including:

- Technical inquiries
- Workflow
- Roles/roleset inquiries
- Enhancements
- Bug reporting

Contact the RMS Project Team Helpline, via email or phone:

rms@ucalgary.ca

403.210.9309

The RMS Project Team Helpline is a supplemental service that will be available until August 31, 2019.