cuResearch
User’s Manual
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/
How to Login:

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

- users with signing or review authority will see Department Signing Authority and/or Reviewer roles appear on their 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)
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- **Applications: Withdrawn** PI no longer pursuing funding and withdraws the application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
Starting a New Application

Step 1: Select “APPLY NEW” to access Application Forms
**Step 2:** Select the appropriate hyperlinked form to start the application.

### New Application Forms

#### A. CORIS Awards

<table>
<thead>
<tr>
<th>Application Name</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Form</td>
<td>This application replaces the old PDF &quot;checklist&quot;. Carleton requires Authorization for all research funding administered through CORIS.</td>
<td>Open</td>
</tr>
<tr>
<td>Carleton International Visiting Scholars Request Form</td>
<td>This application is used to submit a request to host a visiting scholar for the purpose of conducting research at Carleton University.</td>
<td>Open</td>
</tr>
</tbody>
</table>

#### B. Animal Care

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

If you have already submitted your application for required certifications, or already have active applications, select “Search” to bring them up.
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!
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).
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!
If you are completing the application on behalf of the PI, you will have to change the PI role from yourself to the actual PI, again DO NOT do this manually, always select “Change PI”!

**IMPORTANT:** Once you have transferred the role of the PI., 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!
The “Project Sponsor Info” Tab is intended for funding data such as the agency ("Sponsor") and program, requested cash and/or in-kind, etc.

<table>
<thead>
<tr>
<th>Investigator</th>
<th>Agency</th>
<th>Program</th>
<th>Currency</th>
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</table>

Select “Add New” to add a sponsor.
Select “Agency” to choose the funding agency.

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

Please attach any or all of the following information you find relevant to your application:
- Your most recent funding application for this project
- Your most recent detailed budget for this project, *unless already included in the application*
- Your most recent CV

Budget template_Jan 2018.xlsx

**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

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

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