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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/>

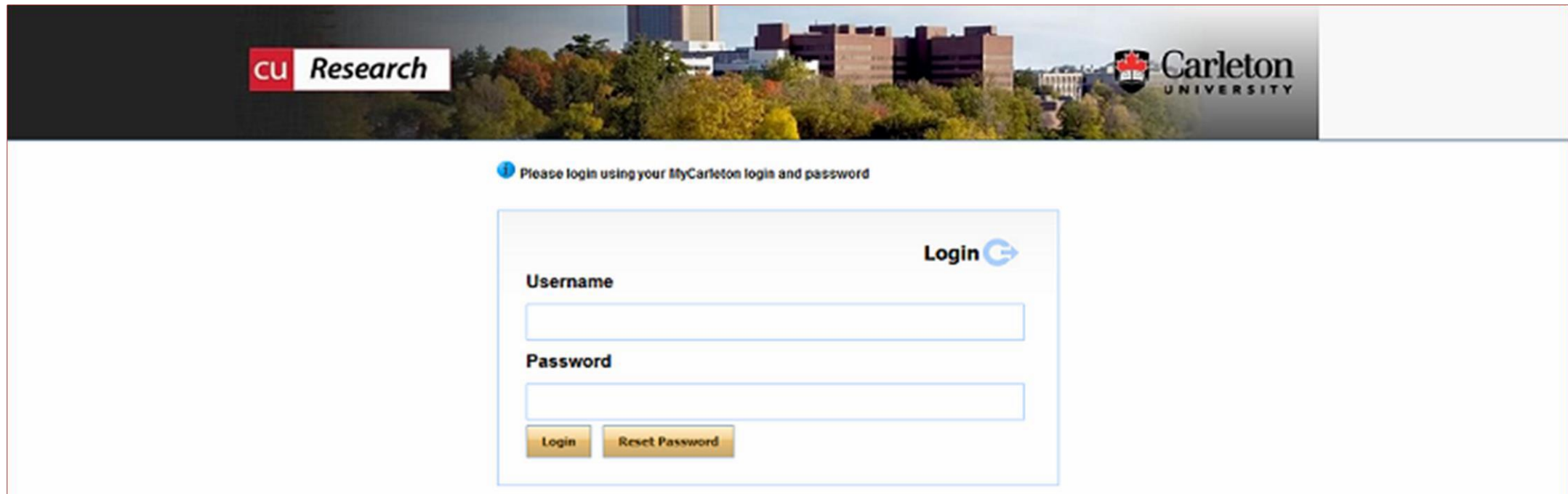
# Accessing cuResearch



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## How to Login:

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

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 states: '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 icon. At the bottom of the login box are two smaller buttons: 'Login' and 'Reset Password'.

# 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



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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)

BACK TO HOME

APPLY NEW | News | Useful Links |

Role: Principal Investigator ☒

Role: Project Team Member ☒

Role: Department Signing Authority ☒

# 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 surrounded by trees. 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.

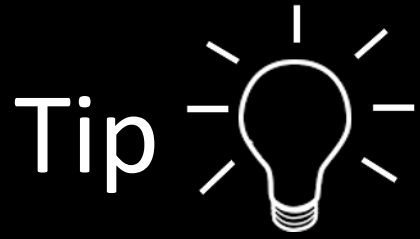
## New Application Forms

### A. CORIS Awards

Application Name	Description	Status
<a href="#">Approval Form</a>	This application replaces the old PDF "checklist". Carleton requires Authorization for all research funding administered through CORIS.	Open
<a href="#">(Carleton International) Visiting Scholars Request Form</a>	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
<a href="#">Approval "in principle" request to the Animal Care Committee</a>	This application is used to submit a request for a release of funds prior to submitting a full application to the ACC.	Open
<a href="#">Lab or Wildlife Protocol</a>	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 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


Application Saved

\* Project Info Project Team Info Project Sponsor Info \* cuResearch Authorization 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

<b>Add New</b>		<b>Search</b>				
		Certification Category	File No	Status	Renewal Date	Notes
<b>Edit</b>	<b>Delete</b>	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   \* cuResearch Authorization 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 an 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:

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:	<input type="text"/>		
Role In Project:	<div>ACVS Staff</div>	Country:	<input type="text"/>
Rank:	ACVS Staff	Institution:	<input type="text"/>
Email:	Award Nominee	Fax:	<input type="text"/>
Phone1:	Awards Administrator	Phone2:	<input type="text"/>
	Co-Investigator		
	Co-Investigator (External)		
Mailing Address:	Collaborator	Mailing Alternate Address:	<input type="text"/>
	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**   \* cuResearch Authorization Form   Attachments   Approvals   Logs   Errors

Click 'Add New' to add funding details for this project

**Add New**

Investigator	Agency	Program	Currency
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  
Abbreviation:

Options	Name	Abbreviation	Source
<input type="button" value="Select"/>	<input type="text"/> <input type="button" value="Y"/>	<input type="text"/> <input type="button" value="Y"/>	<input type="text"/> <input type="button" value="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:	<input type="text" value="Agency"/>
Program:	<input type="text"/>
Start Date:	<input type="text"/>
End Date:	<input type="text"/>
Competition Date:	<input type="text"/>
Currency Type:	<input type="text" value="CAD"/>
Agency Reference No:	<input type="text"/>
Investigator:	<input type="text" value="Lisa Saunders (Primary Investigator)"/>
Comments:	<input type="text"/>

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 with the following fields and callouts:

- Save** and **Close** buttons at the top.
- Funding Disbursement Info.** section header.
- Fiscal Year:** input field.
- Start Date:** input field with a calendar icon. Callout: "Enter the anticipated **start date** of your project."
- End Date:** input field with a calendar icon.
- Requested Cash:** input field. Callout: "Enter the total amount of **cash requested**, as well as **in-kind requested**."
- Requested In-Kind:** input field.
- Requested Overhead:** input field.
- Awarded Cash:** input field.
- Awarded In-Kind:** input field.
- Awarded Overhead:** input field.
- Final Cash:** input field.
- Final In-Kind:** input field.
- Final Overhead:** input field.
- Comments:** text area.
- Save** and **Close** buttons at the bottom. Callout: "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.

\* Project Info   Project Team Info   \* Project Sponsor Info   \* cuResearch Authorization Form   Attachments   Approvals   Logs   Errors

\* Regulatory Compliance Checklist   \* Space Requirements   \* Budget

Please read the questions below, and answer them accordingly.

**i** 1.1) \* What is the applicant's percentage of time on the project?

**i** 1.2) \* Please click on the Carleton University Research Centre that this project is associated with. If your project's Research Centre is not found in the drop down menu pro  
cuResearch@Carleton.ca to have it added.

-Select-

# “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   \* cuResearch Authorization Form   **Attachments**   Approvals   Logs   Errors

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 2016.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



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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

\* cuResearch Authorization Form

Attachments

Approvals

Logs

Errors

Workflow Log

Project Log

Timestamp	Log Activity	User
2016/05/19 14:44	Project Title has been changed from " " to 'CURO Research'	John Smith
2016/05/19 11:53	New File Created	John Smith

“Project Log” tracks and time stamps all

“**Project 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	* cuResearch Authorization Form	Attachments	Approvals	Logs	Errors
--------------	-------------------	----------------------	---------------------------------	-------------	-----------	------	--------

**CURO Checklist (Funding Application)** -> Regulatory Compliance Checklist:1.1 What is the applicant's percentage of time on the project? is required.

**CURO Checklist (Funding Application)** -> Regulatory Compliance Checklist:1.2 Please click on the Carleton University Research Centre that this project is associated with. If the drop down menu provided, please contact [cuResearch@Carleton.ca](mailto:cuResearch@Carleton.ca) to have it added. is required.

# 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 for Carleton University. At the top, there is a navigation bar with several buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". The "Save" and "Close" buttons are highlighted with a red rectangular box. Below this bar is a tabbed interface with tabs for "Project Info", "Project Team Info", "Project Sponsor Info", "\* cuResearch Authorization Form", "Attachments", "Approvals", "Logs", and "Errors". The "Project Info" tab is currently selected. Under this tab, there is a form with the following fields:

- Title \*:** A text area containing the text "CURO Research".
- Start Date:** A date input field with a calendar icon to its right.
- End Date:** 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**

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

Title \*: CURO Research

Start Date: [ ] [ ]

Work Flow Action

Submit Cancel

Comments:

Submit Cancel

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.



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**Have a question?**

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