



ConRAD Navigation: Researcher Edition

Concordia University
Office of Research
Last update: 13-Mar-2012

Introduction to ConRAD

- ConRAD (the Concordia Research Administration Database) is an electronic research management tool which will replace existing **internal** paper-based forms (Grant Submission Forms, Summary Protocol Forms, etc.) in the Office of Research
- Forms completed through ConRAD will be **routed electronically** for signature – no wet signatures required
- ConRAD also creates a **Research Homepage** for researchers – all past, current, and pending research activity (including grant applications, compliance approvals, and agreements) is displayed in a concise format, making it easy to review your research history or track current activities

Logging In

- ConRAD is accessible through the MyConcordia portal under “Research and Innovation”
- Once you click the ConRAD link, you will be brought directly to your personal homepage (no second login required).

The image shows a screenshot of the MyConcordia portal. On the left, there is a blue banner with the MyConcordia logo and the tagline "Your gateway to internal resources". Below the banner is a login form with fields for "NetName (activate)", "Password (forgot?)", and a "Sign in" button. A green box highlights the login form, and a green arrow points from it to the "Research and Innovation" link in the navigation menu on the right. The navigation menu is titled "MyConcordia Menu" and lists various services, with "Research and Innovation" highlighted by a green box.

My Front Page Campus Services

MY CONCORDIA


MyConcordia Menu

- › Student Information System
- › Student Services
- › Course Websites (Moodle)
- › Financial Services
- › Employee Services
- › Retail Services
- › Incident Reports
- › Alerts and Profiles
- › Accounts and Settings
- › Software and Applications
- › Auxiliary Services
- › Student Administrative Affairs
- › **Research and Innovation**
 - Faculty & Staff Services
 - Gartner Research
 - Travel Registry

This is the **Research Portal homepage**. All researchers have **Principal Investigator** and **Project Team Member** roles. If you are a committee member/reviewer and/or signing authority, you will have additional blocks on this page.

You can view all *current* research activity by selecting “**Applications (Submitted – Post Review)**”. You can also see any applications on which you were named as a *co-investigator* through **Role: Project Team Member**.

Powered by **Process Pathways** Welcome: | [Home](#) | [My Profile](#) | [Contact Us](#) | [Help](#) | [Logout](#)

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Role : Principal Investigator

Applications (Saved - Not Submitted)	(0)
Applications (Submitted - Under Review)	(2)
Applications (Submitted - Requiring My Attention)	(0)
Applications (Submitted - Post Review)	(10)
Applications (Withdrawn)	(0)
My Reminders	(0)

Role: Project Team Member

Applications (Saved - Not Submitted)	(0)
Applications (Submitted - Under Review)	(1)
Applications (Submitted - Requiring My Attention)	(0)
Applications (Submitted - Post Review)	(1)
Applications (Withdrawn)	(0)
My Reminders	(0)

Role: Faculty Signing Authority

Applications (New - For Review)	(0)
Applications (Pending Information)	(0)

Role: Reviewer

Applications Requiring Your Review as a Chair	(0)
Applications Requiring Your Review as a Reviewer - New	(0)
Applications Requiring Your Review as a Reviewer - In Progress	(0)
Events Requiring Your Review as a Chair	(0)
Events Requiring Your Review as a Reviewer - New	(0)
Events Requiring Your Review as a Reviewer - In Progress	(0)


Applications (Submitted - Post Review) (10)



To return to your homepage at any time, select **Home** in the upper command bar.

To begin a new application, select **Apply New**.

Powered by **Process Pathways** Welcome: **Home** My Profile Contact Us Help Logout

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APPLY NEW | News | Useful Links | Settings |

Role : Principal Investigator	
Applications (Saved - Not Submitted)	(0)
Applications (Submitted - Under Review)	(2)
Applications (Submitted - Requiring My Attention)	(0)
Applications (Submitted - Post Review)	(10)
Applications (Withdrawn)	(0)
My Reminders	(0)

Role: Project Team Member	
Applications (Saved - Not Submitted)	(0)
Applications (Submitted - Under Review)	(1)
Applications (Submitted - Requiring My Attention)	(0)
Applications (Submitted - Post Review)	(1)
Applications (Withdrawn)	(0)
My Reminders	(0)

Role: Faculty Signing Authority	
Applications (New - For Review)	(0)
Applications (Pending Information)	(0)

Role: Reviewer	
Applications Requiring Your Review as a Chair	(0)
Applications Requiring Your Review as a Reviewer - New	(0)
Applications Requiring Your Review as a Reviewer - In Progress	(0)
Events Requiring Your Review as a Chair	(0)
Events Requiring Your Review as a Reviewer - New	(0)
Events Requiring Your Review as a Reviewer - In Progress	(0)

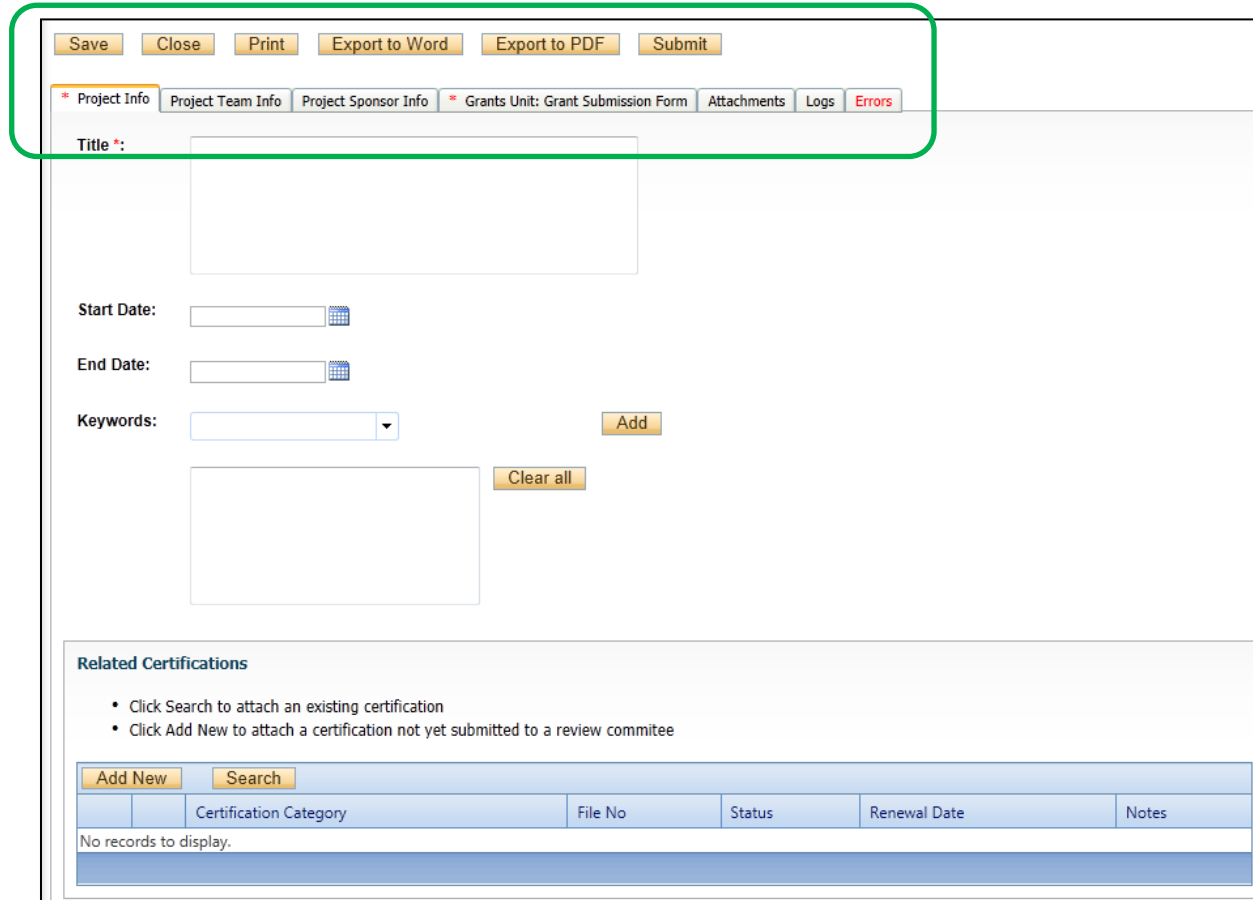


This screen provides a list of all **currently available electronic application forms**. Forms can be added, deleted, or modified as required.

For this demonstration, we will review the **Grant Submission Form**.

New Application Forms	
Office of Research (OOR)	
Application Name	Description
Grants Unit: Grant Submission Form	To be completed for all grant / award applications
Research Partnerships & Innovation Unit: URO 101A	Internal Approval of Application for a Negotiated Grant
Research Partnerships & Innovation Unit: URO 101	Internal Approval of Application for a Contract
Human Ethics Research Committee (HREC)	
Application Name	Description
HREC: Summary Protocol Form (SPF)	To be submitted for any project requiring human ethics certification
HREC: STUDENT Summary Protocol Form (SPF)	To be submitted for any STUDENT project requiring human ethics certification
Animal Research Ethics Committee (AREC)	
Application Name	Description
AREC: Animal Utilization Summary Protocol Form	To be submitted for any project requiring animal care certification

GSF Walkthrough: Project Info



Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Project Sponsor Info * Grants Unit: Grant Submission Form Attachments Logs Errors

Title *:

Start Date:

End Date:

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	Renewal Date	Notes
No records to display.				

The application is sorted by tabs for ease of navigation. Certain tabs, such as Project Team Info, are **automatically pre-populated** with your information.

The **Errors** tab will disappear when all required fields are complete.

GSF Walkthrough: Team Info

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info * HREC: Summary Protocol Form (SPF) Attachments Logs Errors

Principal Investigator

Retrieve Info

Prefix: Ms. Last Name*: Austin First Name*: Nichole

Affiliation*: Faculty of Arts and Science

Rank: Assistant Professor Gender: Female Institution: Concordia University

Phone1: x7341 Phone2: Email*: nichole.austin@concordia.ca Fax: Primary Address: 1000 GM Alternate Address: Preferred Address: Primary Address Alternate Address Country: Canada

Comments: TEST RESEARCHER PROFILE

Other Project Member Info:

Add New

Last Name	First Name
No records to display.	

Your information will appear in this screen **automatically** under Principal Investigator. You can also enter as many Project Team Members (co-investigators, research assistants, students, etc.) as necessary.

GSF Walkthrough: Team Info (2)

The screenshot shows a web form for adding team members. The main form includes fields for Prefix, Last Name, First Name, Affiliation, Gender, Role In Project, Rank, Email, Phone1, Mailing Address, Use Of Address, and Comments. A 'Retrieve Info' button is located in the top right corner, circled in green. A green arrow points from this button to an 'Investigator List' dialog box that is open in the center. The dialog box has a search interface with radio buttons for 'Start With' and 'Any part', input fields for Last Name and First Name, and 'Search' and 'Reset' buttons. Below the search fields is a table with columns for Options, Last Name, First Name, and Primary Affiliation. The table currently displays 'No records to display.' and has a 'Close' button at the bottom.

Options	Last Name	First Name	Primary Affiliation

No records to display.

The best way to add team members to your file is to select **“Retrieve Info”** – all Concordia investigators (and many external investigators) will already be in the database, so try searching by name. If you can’t find your team member, you can always enter them manually on the main screen.

GSF Walkthrough: Sponsor Info

The screenshot shows the 'Project Sponsor Info' tab selected in a navigation menu. Below the menu, there are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The main content area contains a message: 'Click 'Add New' to add funding details for this project'. Below this message is a table with columns for 'Investigator', 'Agency', 'Program', 'Currency', and 'Requested Amount'. The 'Add New' button is circled in green.

Investigator	Agency	Program	Currency	Requested Amount
No records to display.				

In ConRAD, “Sponsor” refers to the funding agency.

Select “Add New” to specify the agency and program to which you are applying.

Note: Certain fields in the Sponsor Info section will be completed by an administrator.

The next page illustrates **which fields must be completed by researchers** (see items circled in **green**).

GSF Walkthrough: Sponsor Info (2)

Sponsor Info.

Agency:

Program:

Fiscal Year:

Start Date:

End Date:

Competition Date:

Agency Reference No:

Currency Type: Agency Reference No:

Investigator:

Comments:

Click 'Add New' to add funding disbursement(s).

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

Funding Disbursement Info.

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:

Final Overhead:

Comments:

To specify the agency, click "Agency" – ConRAD contains a **master list of all funding agencies** to which researchers have applied in the past. You can search by full agency name or abbreviation.

Based on your selection, a **list of agency-specific programs** will be automatically generated.

Enter only the **fiscal year** (use the current year) and the **requested amounts**. All other fields can remain blank.

GSF Walkthrough: Custom Tabs

Application Ref No: 2854 Project Title: Application Form: Grants Unit: Grant Submission Form
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Project Sponsor Info * Grants Unit: Grant Submission Form Attachments Logs Errors

* Overhead * Institutional Commitments * Matching Funds * Compliance & Open Access * Acknowledgement (Tri-Council Responsible Conduct Statement)

Overhead/indirect costs are generally charged to all awards, with the exception of Tri-Council (NSERC, SSHRC, CIHR), Quebec (FRSQ, FQRSC, FQRNT) and NCE grants. If you are applying to an agency not listed above, you MUST verify overhead requirements with your Research Facilitator or the Office of Research and, if applicable, request a waiver from your Faculty.

i 1.1) * Please indicate the type of agency from which you are requesting funds.

- Tri-Council (SSHRC, NSERC, CIHR)
- Quebec (FRSQ, FQRSC, FQRNT)
- NCE
- Other

i 1.2) * If you selected "Other" above, you MUST verify overhead requirements with your research facilitator or with the Office of Research and, if applicable, request a waiver from your Faculty.

- Yes
- No

i 1.3) If you selected "Yes", provide justification for your request below. All requests must be approved by your Faculty signing authority.

This part of the application has been **customized specifically for Concordia** – you will notice that the content mirrors the paper-based GSF.

GSF Walkthrough: Attachments

Application Ref No: 2854 Application Form: Grants Unit: Grant Submission Form

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info Project Sponsor Info * Grants Unit: Grant Submission Form Attachments Logs Errors

Please attach your FULL grant application here.

This can typically be downloaded as a pdf file from the agency's website.
Note: This document is **required** for OOR approval.

*For **inter-institutional awards** (when an applicant from an institution **other than Concordia** is the primary investigator), only the following components must be uploaded:*

- Project summary
- Budget grid
- Budget justification
- Email confirmation of any specified institutional commitments (for example, an email from your Department Chair authorizing access to additional space or facilities)

If a full copy of the inter-institutional application is available (draft or final), you may upload that instead.

NOTE: Grant Submission Forms received without supporting documents will be returned, creating delays in the approval process.

Add Attachment

NOTE : The maximum individual attachment size is 5MB. All attachments larger than 5MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 5MB.

Documents can be uploaded and transmitted via the Attachments tab. Once a document is uploaded here **it will remain stored in your file** and you will be able to view it in the Research Portal, making it easy to reference past applications.

GSF Walkthrough: Log

Close Print Export to Word Export to PDF

NOTE: You are in view only mode, and changes cannot be saved.

Project Info. Project Team Info. Project Sponsor Info. Application for External Funding Attachments **Logs**

Work Flow Logs Project Logs

Timestamp	Log	Work Flow State	Message	User	Role/Group
02/01/2012 13:04	Project Work Flow State has been changed from Pending Info by ORS to ORS Review Attachment Jane_RCMP Draft Agreement.pdf has been Added.	Pending Info by ORS -> ORS Review	Thanks for the reminder; see attached. Please contact me with any further questions. PJ [Action: Re-Submit]	Patrick Jane (su)	Principal Investigator
02/01/2012 13:01	Project Work Flow State has been changed from ORS Review to Pending Info by ORS	ORS Review -> Pending Info by ORS	Hi Jane, Do you have a draft copy of the RCMP research agreement. To date, we've received nothing at our office. Please attach & re-submit. Thanks!	Awdl_User	ORS
02/01/2012 12:52	New File Submitted By Researcher Project Work Flow State has been changed from Pre Submission to ORS Review	Pre Submission -> ORS Review	Thanks for your review. I have applied for human ethics clearance & expect to have full approval by January 12, 2012. I would like to start this research as soon as the RCMP agreement is finalized. Please contact me with any questions or concerns. Thanks again, PJ [Action: Submit]	Patrick Jane (su)	Principal Investigator

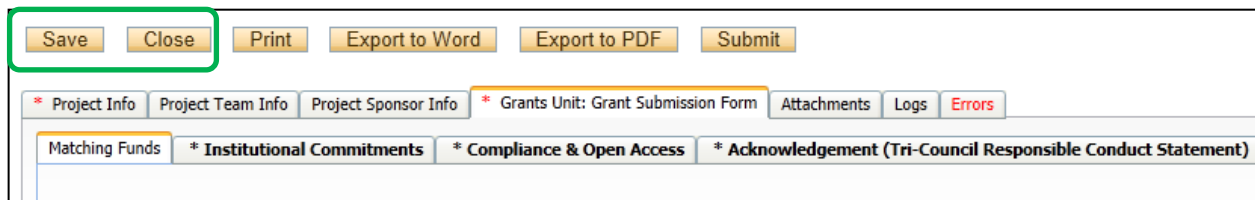
The **Log** tab tracks all activity on your file. This is particularly useful if a delegate/research assistant is preparing the GSF on your behalf.

GSF Walkthrough: Submission

The screenshot displays a web application interface. At the top left, it says "Powered by Process Pathways" and "Welcome: Dexter Morgan". The main content area shows "Application Ref No: 1040" with buttons for "Save", "Close", "Print", and "Export to Word". Below this are tabs for "Project Info", "Project Team Info", "Project Sponsor Info", and "Applic". There are also radio buttons for "Work Flow Logs" and "Project Logs". A table with columns "Timestamp" and "Log" is visible, showing "No records to display" and a "Ready" status. On the right, it says "Application Form: Application for External Funding" and "Role/Group". A central "Work Flow Action" dialog box is open, featuring a "Submit" button highlighted with a red box and a "Cancel" button. The dialog contains a "Comments:" section with a text area containing the text: "Thank you for reviewing my application to Health Canada's granting program. Please contact me directly should additional information be required. DN". At the bottom of the dialog are "Submit" and "Cancel" buttons.

When your application is complete, select “Submit”. This will initiate the electronic routing process – your application will be forwarded via email to the appropriate signing authorities for approval.

To exit a form *without submitting*, click **Save** or **Close**. If you select Close, you will still be asked if you want to save your changes.



In-progress applications are listed as **Applications (Saved – Not Submitted)** in your portfolio.

Submitted applications currently undergoing the approval process are listed as **Applications (Submitted – Under Review)**

Submitted applications that have been approved by your signing authorities are listed as **Applications (Submitted – Post Review)**

Role : Principal Investigator	
Applications (Saved - Not Submitted)	(1)
Applications (Submitted - Under Review)	(0)
Applications (Submitted - Requiring My Attention)	(0)
Applications (Submitted - Post Review)	(16)
Applications (Withdrawn)	(0)
My Reminders	(0)

Post-approval: Events

Role : Principal Investigator

- Applications (Saved - Not Submitted)
- Applications (Submitted - Under Review)
- Applications (Submitted - Requiring My Attention)
- Applications (Submitted - Post Review)
- Applications (Withdrawn)
- My Reminders

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	Project Title	Principal Investigator	File No	Application Form Name	Work Flow State	Project Status	Last Saved	Message
View Clone Events	Test HREC app	Ms. Nichole Austin	30000790	HREC: Summary Protocol Form (SPF) (Certification)\Human Ethics)	Approval Decision Made	Active		

Once an application exists in the system, **Event Forms** can be used to update, modify, or renew the initial file.

When would you use an Event Form?

- **Renewals** for human ethics
- **Annual reports** for animal care
- **Extension requests** for INTERNAL awards (Seed, ARRE, etc.)

Event Forms: Selection



FileNo: 30000790

New Event Forms

Form Name
AREC: Modification
HREC: Annual Report / Renewal
HREC: Modification
HREC: Serious Adverse Event Report
HREC: Study Closure Notification

My Reminders

Milestone	Due Date	Comments	Sponsor	Event	Related Forms
Renewal Due	2013/01/31	Reminder: Renewal due	N/A	N/A	Apply manually

My Expired Reminders

My Events

	Form	Category	Status	SubmissionDate
	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
View Event		New Approval Process	Submitted by Researcher	2013/01/23

All available Event Forms are listed on this screen. *Reminders* may also be displayed for certain applications.

In this example, a reminder (and due date) appears for a human ethics renewal. We'll select **HREC: Annual Report/Renewal** from the list of Event options.

Event Form: HREC Renewal

Event: Annual Report / Renewal FileNo: 30000790
PI : Austin Nichole(Faculté de génie et d'informatique)

Save Close Print Export to Word Export to PDF Submit

Event Info * HREC: Annual Report / Renewal Attachments Errors

Study Progress Study Changes or Events * Investigator Acknowledgement

Please answer the following questions.

1.1 Is data collection from human subjects still active in this protocol?

Yes
 No

1.2 If no, when did the data collection phase end?

1.3 Is there currently primary data from this study in storage?

Yes
 No

1.4 IF YES: Please give details on the format and location of this data storage, who has access to it, and the plan for its eventual disposal/destruction. IF NO: Please give details as to when this data was disposed of or destroyed, and what method was used to do so.

1.5 What is the current funding status of this project?

-Select-

Event Forms are organized by tabs.
Clicking "Submit" will route the Event Form directly to the Office of Research.
Event data will feed into your original file, giving you a **comprehensive history of all activity over time.**

Support

System Issues

Having trouble submitting a form?

Is incorrect information listed in your profile?

Contact:

conrad@algor.concordia.ca

Content Issues

Not sure about overhead?

Have questions about the review process or timelines?

Contact:

oor@alcor.concordia.ca (for awards)

OOR.Ethics@concordia.ca (for compliance)

Your research facilitator