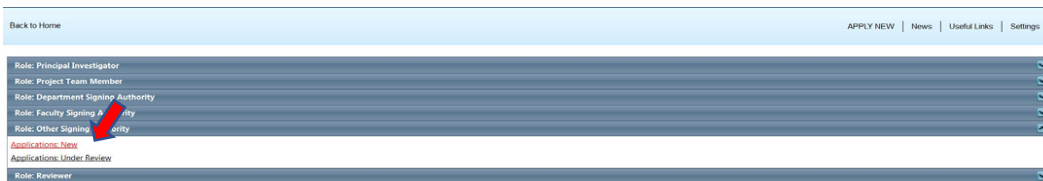


Workflow Approval Process (May 2020)

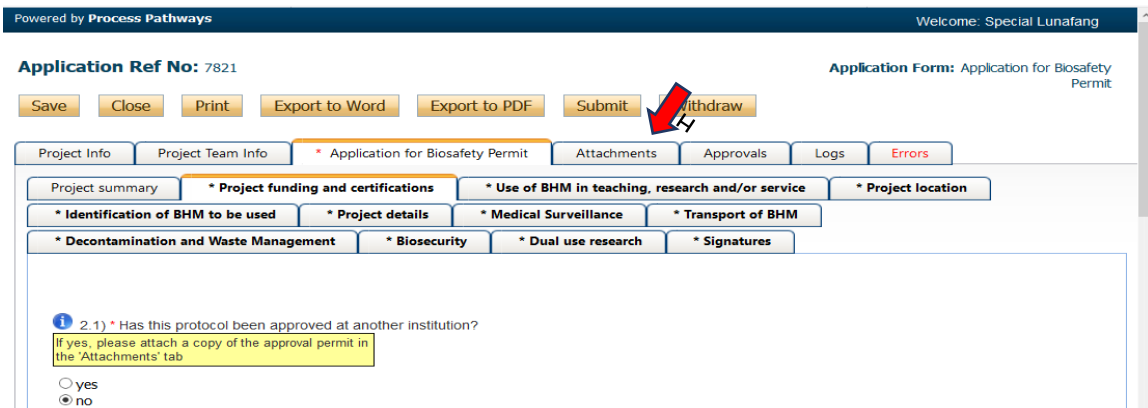
If you encounter any problems or have any questions, please contact Research Services at researcherportal@upei.ca or Joy Knight at 902-620-5104.

The workflow approval process is the same whether the application is for a certification (Biosafety application submission form, etc.) or a funding application (Tri-Council award, contract, etc.).

1. When you have a file to approve, you will receive an email from researcherportal@upei.ca with the subject line: **You have been assigned as a signing authority.**
2. The UPEI Researcher Portal URL is <https://upei.researchservicesoffice.com/Romeo.Researcher/> Log into the system using your Researcher Portal login name and password.
3. The quick link '**Role: Department Signing Authority**' or '**Role: Faculty Signing Authority**' will direct you to all application forms where you have been assigned as a signing authority. When an action is required, the quick link will appear in **red**.
4. Click on 'Applications: New'



5. Select 'View' to enter the file and review the application.
6. Click the various tabs to view all sections of the application. You can also export the application in Word or PDF format, which will allow you to view the entire application in one document.
Tip: Word format is a more eye appealing document than PDF.
7. Review each tab of the application (Project Info., Project Team Info., etc.)
8. Click on the 'Attachments' tab to view any attachments included with the application. Click on the File Name to open the attachment.



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Application Ref No: 7821 **Application Form:** Application for Biosafety Permit

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info *** Application for Biosafety Permit** Attachments Approvals Logs Errors

Project summary *** Project funding and certifications** *** Use of BHM in teaching, research and/or service** *** Project location**

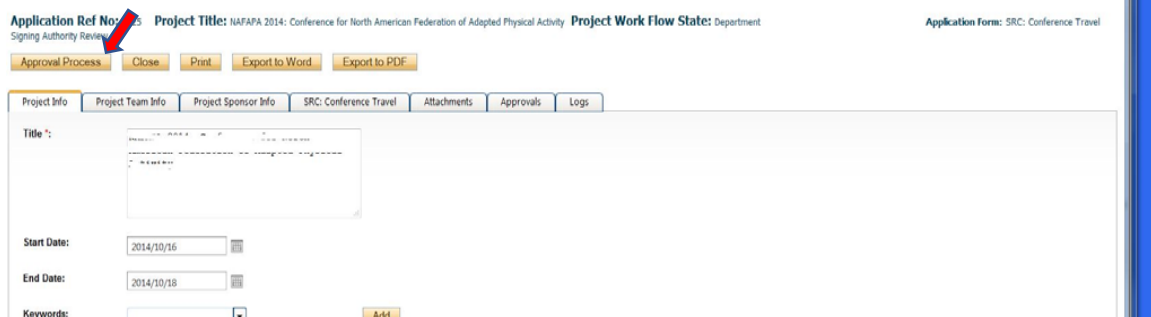
*** Identification of BHM to be used** *** Project details** *** Medical Surveillance** *** Transport of BHM**

*** Decontamination and Waste Management** *** Biosecurity** *** Dual use research** *** Signatures**

2.1) * Has this protocol been approved at another institution?
If yes, please attach a copy of the approval permit in the 'Attachments' tab

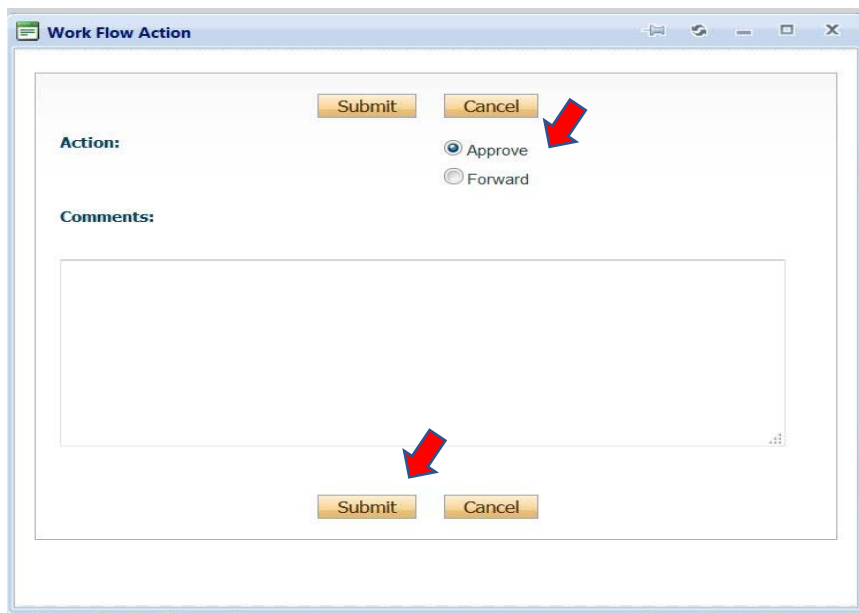
yes
 no

9. When finished reviewing the application, click on the 'Approval Process' tab at the top



The screenshot shows a web application interface for reviewing an application. At the top, there is a header with the following information: "Application Ref No: [redacted]", "Project Title: NAFAPA 2014: Conference for North American Federation of Adopted Physical Activity", "Project Work Flow State: Department", and "Application Form: SRC: Conference Travel". Below the header, there are several buttons: "Approval Process" (highlighted with a red arrow), "Close", "Print", "Export to Word", and "Export to PDF". The main content area has a tabbed interface with the following tabs: "Project Info", "Project Team Info", "Project Sponsor Info", "SRC: Conference Travel", "Attachments", "Approvals", and "Logs". The "Project Info" tab is active, showing a form with the following fields: "Title:" (with a text area), "Start Date:" (with a date picker set to 2014/10/16), "End Date:" (with a date picker set to 2014/10/18), and "Keywords:" (with a dropdown menu and an "Add" button).

10. Select 'Approve' to grant your approval and forward to the next step of the approval process. Add a comment, such as 'I approve', then select 'Submit'. (Select 'Forward' to send to the next signing authority WITHOUT your approval.)



The screenshot shows a "Work Flow Action" dialog box. At the top, there are two buttons: "Submit" and "Cancel". Below these buttons, there is a section labeled "Action:" with two radio button options: "Approve" (selected) and "Forward". A red arrow points to the "Approve" radio button. Below the "Action:" section, there is a section labeled "Comments:" with a large text area. A red arrow points to the "Submit" button at the bottom of the dialog box.

11. If you encounter any problems or have any questions, then please contact Research Services at researcherportal@upei.ca or 902-620-5104.