

UPEI Researcher Portal FAQs

⇒ What is the UPEI Researcher Portal?

The UPEI Researcher Portal is a database for the electronic management of research funding (grants and contracts) and compliance applications.

The online portal permits electronic processing associated with the submission, review and approval of research-related grants, contracts, and certification forms. It will also provide researchers with online, password protected access to all their research-related funding and certification files in the database.

⇒ How do I get training on using the UPEI Researcher Portal?

It is recommended to review the online guides to:

1. [How to log into the UPEI Researcher Portal](#)
2. [How to complete and submit application* forms](#)
3. [How to complete and submit event** forms](#)
4. [Instructions for Department Chairs and Faculty Deans for the review and approval of documents](#)

Should you have specific queries, you are welcome to direct them to researcherportal@upei.ca. If you would like to request one-on-one training, please send a request to researcherportal@upei.ca.

⇒ Where do I login to the UPEI Researcher Portal?

Access to the portal can be found at the following locations:

- Website: <https://upei.researchservicesoffice.com/Romeo.Researcher/>
- My.UPEI.ca : Select the logo: 
- Research Services Forms website provides access to both training and the UPEI Researcher Portal: <https://www.upei.ca/research-services/forms>

⇒ I forgot my Password. What do I do?

On the UPEI Researcher Portal login [page](#) , enter your email address that was used for the initial UPEI Researcher Portal registration and select reset password. A reset code will be sent to



your email address to enable resetting your password.

➡ What is the difference between an Application and an Event in the UPEI Researcher Portal?

Users can submit an **“application”** form for new and original files within the UPEI Researcher Portal. New applications fall into the following four categories:

- Office of Research Services (for grant, contract and other related applications)
- Animal Use Protocols (AUP)
- Biosafety Protocols (IBC)
- Research Ethics Board Protocols (REB)

Instructions on submitting application forms are available [here](#).

Event forms are designed to capture data subsequent to an original application. Event forms allow researchers to request amendments to their active grants, contracts and agreements, request transfer of funds, and renew and/or modify existing certification files.

Instructions on submitting event forms are available [here](#).

➡ The file I wish to work with has been locked. What should I do?

Although multiple users can view one file simultaneously, only one user can edit a file at any given time. While the file is being edited, other users will have “view” only access. Once the user saves and edits the file, the file unlocks and is accessible to other users for additional edits.

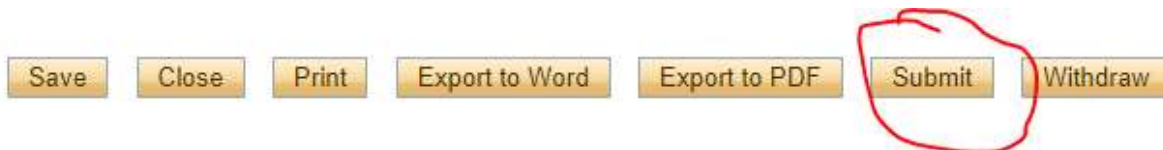
In the certain situations, such as time-outs, the file may remain locked and may require manual unlocking by the user. The UPEI Researcher Portal will show the name of the person who locked the file. Contact this team member and request that they log in, access the file, and save and close. Should it not be possible to contact the team member, please send an email to researcherportal@upei.ca to request an unlock.

If you wish to edit a file has been locked by Research Services, please send an email to researcherportal@upei.ca to request an unlock.

➡ Who can submit an Application form on the UPEI Researcher Portal?

Only the Principal Investigator listed on the application form can submit the application. When the PI submits the application, they are accepting responsibility for the content of the applications.



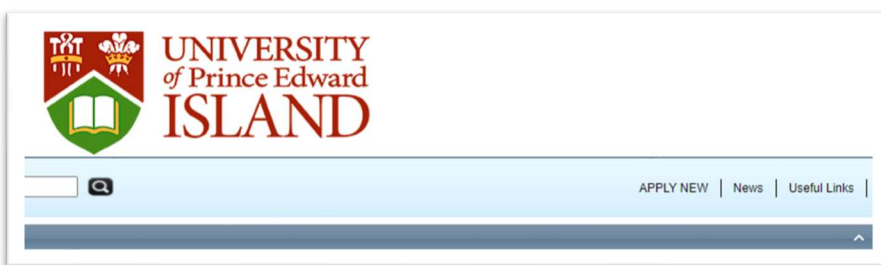


➔ Who can submit an “Event Form”?

Although only the Principal Investigator can submit an application form, an Event Form can be submitted by a PI or a team member.

➔ Where can I find information within the UPEI Researcher Portal?

On the Home page at the UPEI Researcher Portal, users can click on hyperlink for “Useful Links” to access more information. The information is updated regularly and includes links to the UPEI Researcher Portal instructions and guides.



➔ Can I start an application and then change the Principal Investigator?

Yes, the UPEI Researcher Portal is set up to allow project team members to initiate or complete the majority of the application forms. You can change the Principal Investigator role but remember to add yourself back to the team under the **Project Team Info** tab (Add New).

It is important to remember that when you change the role of Principal investigator, the PI is the only person able to submit the application. As a project team member, you will be able to edit the information up until the PI submits the application.

➔ I saved my work but still lost information. Why?

Data loss and error messages can result from using unsupported navigation symbols when completing a form in the UPEI Researcher Portal. To avoid data loss, follow these simple rules:



- Do not open multiple sessions of the UPEI Researcher Portal.
- Use only the navigation buttons in the UPEI Researcher Portal and avoid the use of your browser's back and forward navigation buttons.
- If you have created and saved a form, but cannot locate it, then it will be stored as a draft. Check the relevant location (Events: Draft and Applications: Draft) to access this form. You can find these options on your UPEI Researcher Portal Home page.

➔ What is the difference between a File Number and a Reference Number?

All newly created applications and events are automatically assigned a reference number (ex. 4556). Once the form has cleared all signing authority approvals, the reference number turns into a 7-digit file number (ex. 6003567).

The reference number is assigned at the pre-approval stage and the file number is assigned at the post-approval stage.

➔ I cannot submit my application. Why?

The **Errors** tab appears when you begin the application. It will disappear when you have completed an application with no errors. Refer to the Errors tab to see if there are any mandatory questions you may not have answered. The PI will not be able to submit the application until all the errors are cleared.

Application and Event Forms can be accessed in both “view only” and “edit” mode, by the PI and team members. The submit button is only available in the “edit” mode.

If you are still unable to submit after all the errors are cleared, please send an email to researcherportal@upei.ca to request assistance.

➔ I need to upload an attachment that is bigger than 10MB. What do I do?

The maximum size per file is 10MB. If your file is larger than that, try ‘zipping’ the file or saving it as a compressed PDF document. If this is not sufficient to meet the file size restriction, simply break the file into pieces equal to or less than the maximum size accepted by the Portal, clearly label each piece (e.g., ‘Part 1 of 5 – Attachment 2’) and upload.

To ensure successful uploads, please note the following:

- File names **MUST NOT** include special character such as: “ , # % & * : < > ? / { } | ~



- Do not use the period character in the middle of a file name, or at either the start or end of a file name

➡ Can I withdraw my application once it is submitted?

To withdraw an application pre-submission, click on Applications: Draft within the Principal Investigator Role Block. When you have located the specific application, click “Edit” to access the file, and then click “Withdraw”.

After submission, the PI must contact the UPEI Researcher Portal team to withdraw an application.

➡ Can I confirm my application has been submitted?

You will receive a confirmation email. You can also view the Logs tab within the UPEI Researcher Portal. The Logs tab is a useful tool that allows researchers and research administrators to track the history of the application and communicate with one another. The Application Workflow Log option time stamps approvals and messages. The Workflow Log starts to populate after the application has been submitted. Refer to the Workflow Log to review all workflow history.

➡ Do you have any UPEI Researcher Portal tips?

Things to remember:

- **LOGIN**- Remember to use your entire email address as your “Username” when logging in the UPEI Researcher Portal (e.g. xxxx@upei.ca).
- **SAVE** – Remember to hit the save button frequently, at a minimum click save before moving to a new tab within the form.
- **SAVE AND CLOSE** – There is no automatic save function, but there is a time out feature. If you need to step away from your computer, you should always hit “Save” and “Close” as a precautionary measure. Failing to do so could result in information being lost and the application being “Locked”. The user responsible for “locking” the application will be able to unlock it by accessing it again and exiting properly. All other members who find themselves locked out can contact either the user who “locked” it or Research Services: researcherportal@upei.ca.
- **SUBMISSIONS** - Please remember only PI’s can submit applications.
- **ERRORS TAB** – Please note that incomplete applications cannot be submitted. If the



“Errors” tab is still visible, then some of the mandatory questions have been left unanswered and you will not be able to submit the application. The “Errors” tab will provide a list of the unanswered mandatory questions. When all mandatory questions have been answered, the “Errors” tab will disappear.

➔ **Who do I contact for questions?**

Should you have specific queries about use of the UPEI Researcher Portal, please direct them to researcherportal@upei.ca.

