



Office of Research Services

ROMEIO Researcher Portal How-To Guide

(July 2022)

Contents

Creating a Researcher Portal Login.....	2
Navigating the Researcher Portal	4
Starting an Application as the Principal Investigator.....	6
Awards Files	6
Compliance Files	6
Starting an Application on Behalf of a Principal Investigator	7
Adding Project Team Member(s).....	8
Adding Sponsor Information.....	9
Attachments, Approvals, Logs, and Errors.....	11
Signing Authority Guide - Reviewing an Application	13
Event Forms	16
Initial Submission	16
Revisions	18

Creating a Researcher Portal Login

To be able to submit applications through Romeo Researcher Portal, you will first need to create a login.

1. Visit the Romeo Researcher Portal at the following link:
<https://upei.researchservicesoffice.com/Romeo.Researcher/>
2. Then, click “Register”

The image shows a login/register form. It has a light blue background. At the top right, there is a "Login" button with a circular arrow icon. Below it are two input fields: "Username" and "Password". At the bottom, there are three buttons: "Login", "Register", and "Reset Password". The "Register" button is highlighted with a red square.

3. Fill out your profile information, ensuring all pieces are accurate. If you are internal to UPEI, please register using your UPEI email address.

The image shows the "Self Registration" form. It has a light blue background. At the top, there is a dark blue bar with the text "Powered by Process Pathways" on the left and the University of Prince Edward Island logo on the right. Below the logo, the text "Self Registration" is displayed, followed by a link "Click here for guide". The form contains several input fields: "Prefix/Last Name" (with a dropdown), "First Name", "Email", "Country" (with a dropdown set to "Canada"), "Institution" (with a dropdown), "Address", "Comments", "Phone1", "Phone2", "Fax", "Position" (with a dropdown), and "Alternate Address". At the bottom, there is an "Add New" button and a table for "Affiliations" with columns for "Level", "Unit", and "Primary". The table currently shows "No records to display." At the bottom right, there are "Register" and "Back" buttons.

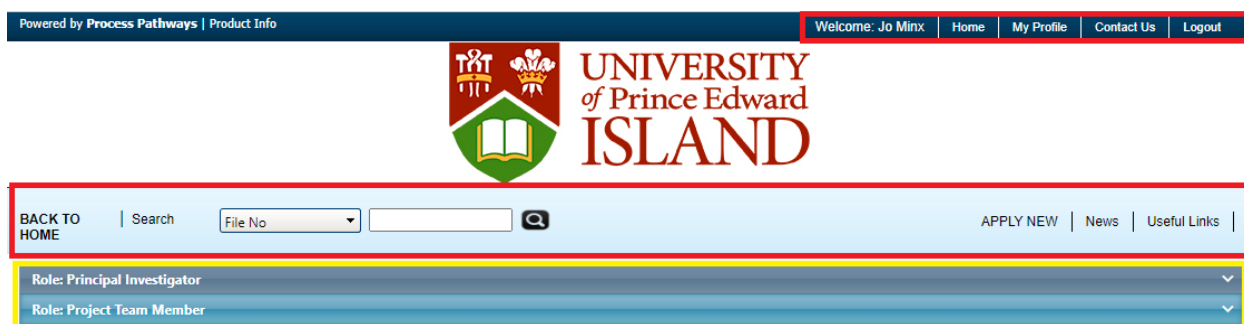
- 3.1. From the self-registration screen, when assigning your affiliations, please list your department (if applicable) as your primary affiliation. If you are part of a faculty that does not have designated departments, please list your faculty affiliation. If you are not from UPEI, please choose “External” from the faculty affiliation list.

4. Once completed, click “Register” along the bottom right of your browser widow.
5. You will receive an email from research@upei.ca confirming your registration, your login username, and a confirmation code. Follow the link included in this email, enter your confirmation code and create a password for your login. Your password must be between 8 and 16 characters and contain one uppercase letter, one lowercase letter and one number. No special characters are allowed (e.g. !@#\$%^&*). Once you have entered your password, click confirm to complete the registration process.
6. You will now be able to login to the Romeo Researcher Portal with the credentials you just created.
7. If at any point you have issues or questions about the Romeo Researcher Portal registration process, please reach out to our office at researchservices@upei.ca

Navigating the Researcher Portal

The researcher portal is intended to streamline the submission and approval process and provide researchers with easier access to approval forms.

The home page of the Researcher Portal has a few important elements to note. The two sections highlighted in red in the image below are the *Navigation Bars*, while the section highlighted in yellow is called the *Role Blocks*.



Navigation Bars

- The 'Home' or 'Back to Home' icon will take you back to the home screen, as seen above.
- The "My Profile" will show the personal information you set up when creating your account. You can update some information here such as your position within the university and your name's prefix. If additional information needs to be updated, please contact researchservices@upeu.ca
- "Logout" will fully log you out of the Researcher Portal. Please use this feature when done working on your application to ensure you do not lock your files or your user account. If this occurs, please contact us at researchservices@upeu.ca
- Search will allow you to search your files using specific search criteria such as the file number or reference number. This can be useful if you have many files and a manual search in your Role Block is too time consuming.
- "Apply New" allows you to choose from active approval forms. More on this will be discussed in the "Starting an Application..." section discussed on page 6.

Role Blocks

Role blocks—as highlighted in yellow above—vary on one's role/position. At a minimum, a researcher will have the "Principal Investigator" and "Project Team Member" as shown in the image above. Additional fields will populate for department chairs, deans, or committee reviewers.

- "Principal Investigator" will contain applications where you are the PI
- "Project Team Member" will contain applications where you are a member on this project
- "Department Signing Authority" contains applications that require your approval as the designated department chair
- "Faculty Signing Authority" contains applications that require your approval as the dean, and

- “Reviewer” contains applications where you are a committee member required to review an application. This is only applicable to certification files.

Within a role block, applications are sorted based on their status at the time.

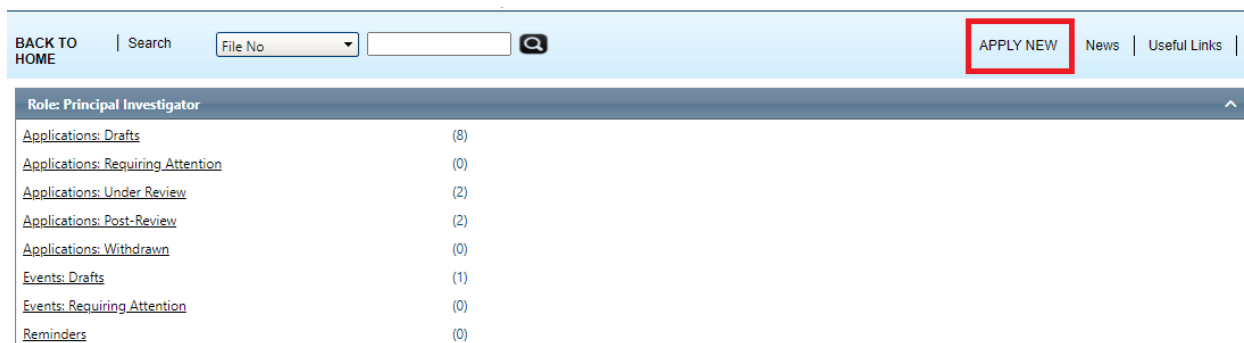
Role: Principal Investigator ^	
Applications: Drafts	(27)
Applications: Requiring Attention	(0)
Applications: Under Review	(0)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)

- ‘Drafts’ are applications that have not yet been submitted;
- ‘Requiring Attention’ are applications that have been sent back to you for edits and resubmission—these will be highlighted in red when applications are present;
- ‘Under Review’ are applications that have been received by the Office of Research Services, but an approval decision has not yet been made;
- ‘Post-Review’ are applications where a decision has been made. Note: you can submit additional documentation on these files or submit an ‘Events’ form to append these files. Events forms are discussed in more detail on page 16.

Starting an Application as the Principal Investigator

There are two types of application forms on the Researcher portal which reflect a parent/child relationship with Romeo files. Submitting a new application is the first step to creating a new (parent) file in Romeo. The other is referred to as an **Events Form** which creates a child file—or subfile—within a pre-existing Romeo file. This section will look at how to create a new (parent) file using new application forms. For information on events forms, please refer to page 16 of this document.

1. From the home screen of the Researcher Portal, click “Apply New” near the top right of your window.



2. Select the application related to what you are applying for. All forms under the section titled Office of Research Development create an **Awards file**, while applications under the Animal Care Committee, Biosafety Committee or Research Ethics Board creates a **Compliance file**.

Awards Files

Awards files are files associated with a research grant or contract, are connected to a research funding account, and are required to bring research funds in to or send out from, UPEI.

Compliance Files

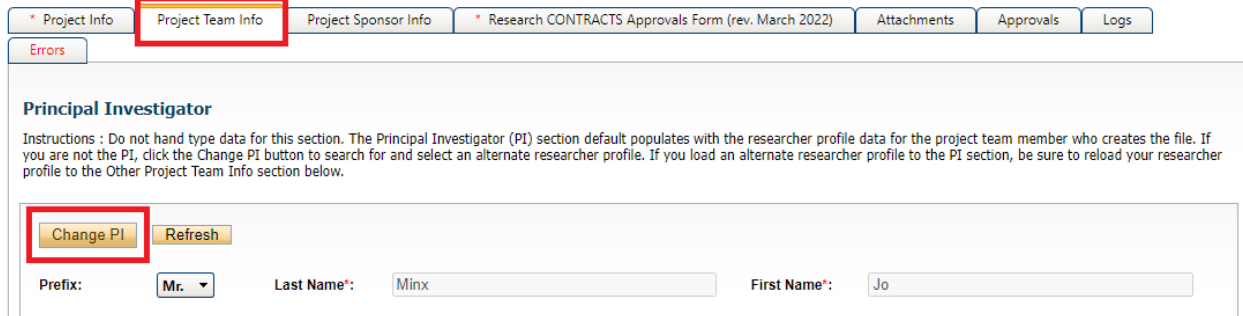
Compliance files are those needed to ensure research adheres to rules, regulations, policies, and standards of conduct with the regulatory bodies related to the research. These include Animal Use Protocols for research involving animals as regulated by the Animal Care Committee; Biosafety permits needed for handling biohazardous material as regulated by the biosafety committee, and; Research Ethics protocols for researching involving human subjects as regulated by the Research Ethics Board.

3. Enter all requested information in all application tabs. Remember that fields marked with a **red asterisk (*)** are mandatory.
4. Users are strongly encouraged to select the SAVE button after completing each tab, or more frequently, and before leaving the application for an extended period of time. Failure to do this may lock your application. If your application is locked, please contact researchservices@upei.ca
5. Applications are routed for automatic approval from your chair (where applicable) and dean. You must seek manual approval for all event forms submitted. Please see page 17 for more on event forms.

Starting an Application on Behalf of a Principal Investigator

When starting a new application, you will automatically be assigned as the principal investigator (PI) on the file. If starting an application on behalf of another PI, you will need to change the PI's name once you begin the draft of the application.

1. To do this, select the "Project Team Info" tab along the top of the application, and then click "Change PI" at the top left side of the window.



* Project Info **Project Team Info** Project Sponsor Info * Research CONTRACTS Approvals Form (rev. March 2022) Attachments Approvals Logs

Errors

Principal Investigator

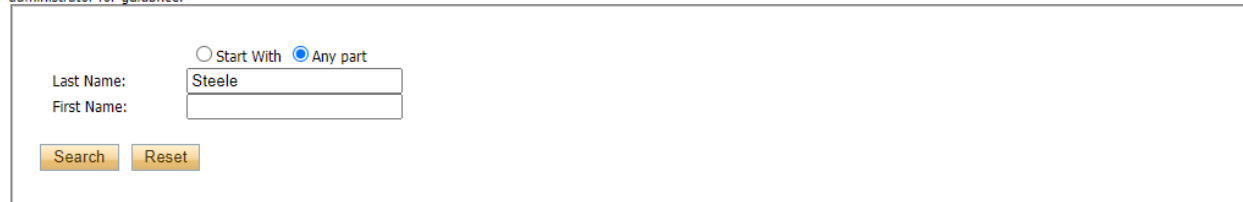
Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile data for the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If you load an alternate 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*:

2. A window will appear which allows you to search the new PI by their first or last name. The search results below will populate with all users meeting the name entered. If there is more than one result, verify primary affiliation to ensure you are selecting the proper new PI. Then, choose "Select" to the left of their name.

Instructions : Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance.



Start With Any part

Last Name:

First Name:

Search **Reset**

Options	Last Name	First Name	Primary Affiliation
	<input type="text" value="Steele"/> ▼	<input type="text" value="Maria"/> ▼	<input type="text" value="University Administration\University of PEI (Institutional)"/> ▼
Select	Steele	Maria	University Administration\University of PEI (Institutional)
Select	Steele	Maria	University Administration

Close

3. Now, once you save your application the new PI will be automatically assigned. If you continue as a project member on this file, you will also need to add yourself as a project member, otherwise you will lose all access to the file once you save it. How to add project members is covered in the next section.

Adding Project Team Member(s)

Adding additional project team members is done similar to the method for changing PI as described above.

1. From the Project Team Info tab, scroll to the bottom of the window and select “Add New” under Other Project Member Info

Other Project Member Info:
Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

Add New ?		
Last Name	First Name	Role In Project
No records to display.		

2. Click “Search Profiles”

Project Team Member Info

Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

?

Prefix: Last Name: First Name:

Affiliation:

3. Search using first or last name. If more than one person populates in the list using the criteria you entered, verify by Primary Affiliation, and then click “Select” to the left of the new project member’s name.
4. Select “Save”

The new project member is now added.

Adding Sponsor Information

A project sponsor is the individual, business or organization that is funding your research project, whether this comes in the form of a contract or grant. Logging project sponsor information is important to ensure that incoming funds are properly assigned to your research funding account.

1. To add a sponsor, click the “Project Sponsor Info” tab along the top of your application.
2. Click “Add New”

The screenshot shows the 'Project Sponsor Info' tab selected in a navigation bar. Below the navigation bar, there is a message: 'Click Add New to add funder and per fiscal year budget details for this project.' A yellow 'Add New' button is highlighted with a red box. Below this, there is a table with columns: Investigator, Agency, Program, and Total Requested Amount. The table currently contains no records, with the text 'No records to display.' below it.

3. Click the yellow icon labeled “Agency”

The screenshot shows the 'Sponsor Info' form. At the top, there are 'Save' and 'Close' buttons. Below them is the instruction: 'Complete all fields and click generate to add per fiscal year budget request for this funder.' The form has two main sections: 'Agency:' and 'Program:'. The 'Agency:' field has a yellow 'Agency' button highlighted with a red box. The 'Program:' field is a dropdown menu.

4. Search using agency name and click ‘Select’ to the left of the agency.

The screenshot shows the 'Agency List' search interface. At the top, there is a 'Close' button. Below it, there are radio buttons for 'Start With' and 'Any part', with 'Any part' selected. There are two input fields: 'Agency Name:' containing 'climate action' and 'Abbreviation:'. Below these are 'Search' and 'Reset' buttons. At the bottom, there is a table with columns: Options, Name, Abbreviation, and Source. The 'Options' column has a yellow 'Select' button highlighted with a red box. The table contains one row of results.

Options	Name	Abbreviation	Source
Select	PEI Dept of Environment, Energy and Climate Action	PEI DEPT EE&CA	Government – PEI

5. **NOTE: If the agency does not exist**, or you are unable to find it in the list, please select “#Sponsor Not Listed (**Note Sponsor in Comments**)” and note the proper funding agency in the comments section of the previous screen.

- Once the agency is selected, fill in additional funding information such as the granting program or agreement type, and term of funding availability (if known).

Complete all fields and click generate to add per fiscal year budget request for this funder.

Sponsor Info.

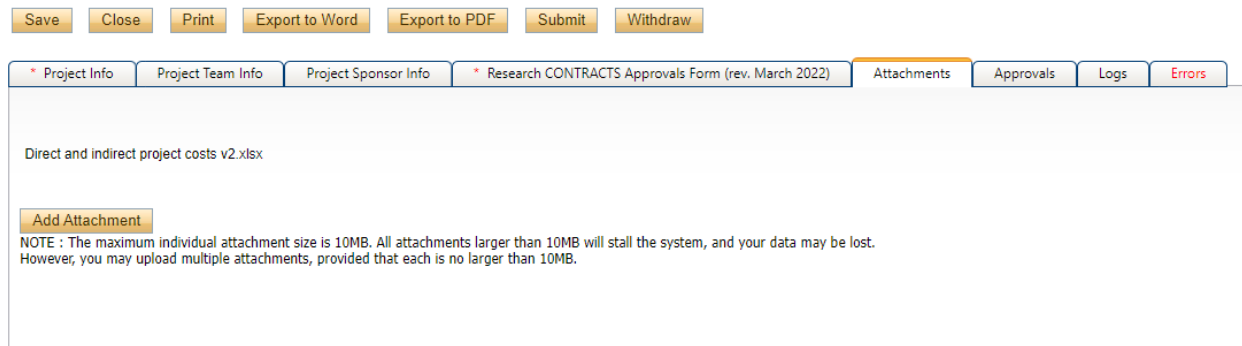
Agency:	PEI Dept of Environment, Energy and Climate Action	<input type="button" value="Agency"/>
Program:	<input type="text" value="Amendment"/>	
Investigator:	<input type="text" value="0"/>	
Competition Date:	<input type="text"/>	<input type="button" value="Calendar"/>
Start Date:	<input type="text"/>	<input type="button" value="Calendar"/>
End Date:	<input type="text"/>	<input type="button" value="Calendar"/>
Currency Type:	<input type="text" value="CAD"/>	
Comments:	<input type="text"/>	

Attachments, Approvals, Logs, and Errors

The ‘Attachments,’ ‘Approvals,’ ‘Logs,’ and ‘Errors’ tabs at the top of a (parent) application do not require much intervention from a PI, except for the ‘Attachments’ tab.

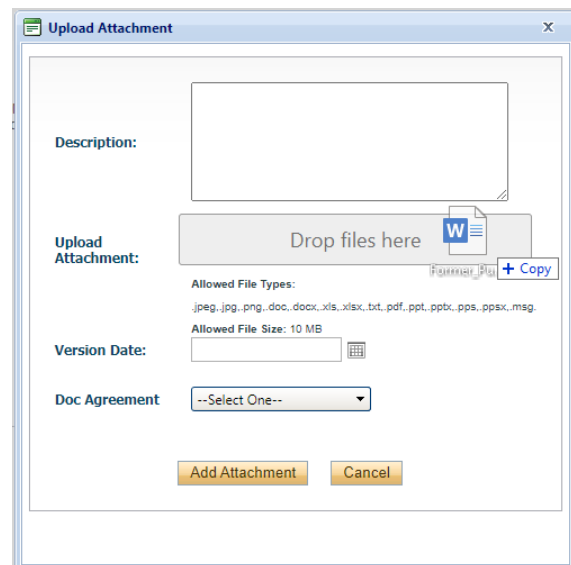
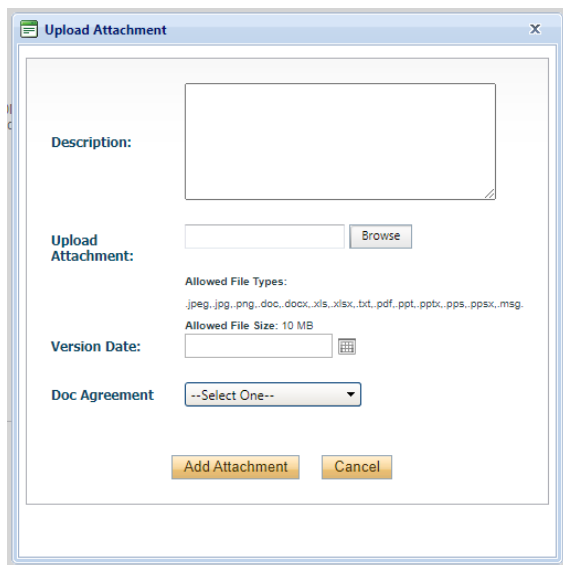
Attachments

Most files will require you to submit additional documentation, such as copies of an agreement, grant application, budgets, and other additional substantiating documentation.



You can upload documents by:

1. Clicking “Add Attachment”



2. Click “Browse” and navigate to the file location on your computer OR drag and drop the file over the “Upload Attachment” section of the attachment window. If dragging/dropping a file, the “Browse” icon will turn into a greyed space indicating “Drop files here”

3. Be sure to also include the version date (eg. Latest date an agreement was signed), and the document type. If the document type is not listed, please select "Other".

Approvals

This tab indicates the stages in the approval process that your application will pass through after you submit it. Because UPEI does not have Divisions, this section is excluded. This means applications will pass for Department Chair (where applicable) approval, followed by Faculty Deans approval before being forwarded to the office of Research Services/Research Ethics for processing.

Logs

The Logs section of a file indicates activity on a file, such as what information has been added or updated, when and by whom. At the time of creating and submitting a file, this tab will be blank.

Errors

The Errors tab is pertinent when submitting an application as it shows what required information is still missing. If you are having issues with submitting an application, check this tab to see what question you need to answer and where. Alternatively, look for the tab with the red asterisk (*) next to it.

Signing Authority Guide - Reviewing an Application

As a department chair, dean, or committee reviewer, you will be required to review submitted applications within the Researcher Portal.

Approval Process

1. When an application requiring your review is submitted, the researcher portal will send you an email notification. The file can be found in the Researcher Portal under the relevant Role Block, highlighted as shown below.

Role: Principal Investigator	▼
Role: Project Team Member	▼
Role: Department Signing Authority	▲
Applications: New*	(1)
Applications: Pending Requested Info	(0)
Applications: Under Review	(5)

- Applications: Pending Requested Info list all applications that you, as a reviewer/signing authority, have sent back to a PI to edit or revise
- Applications: Under Review contain all applications that you have forwarded but are still awaiting a decision to be made by ORS.

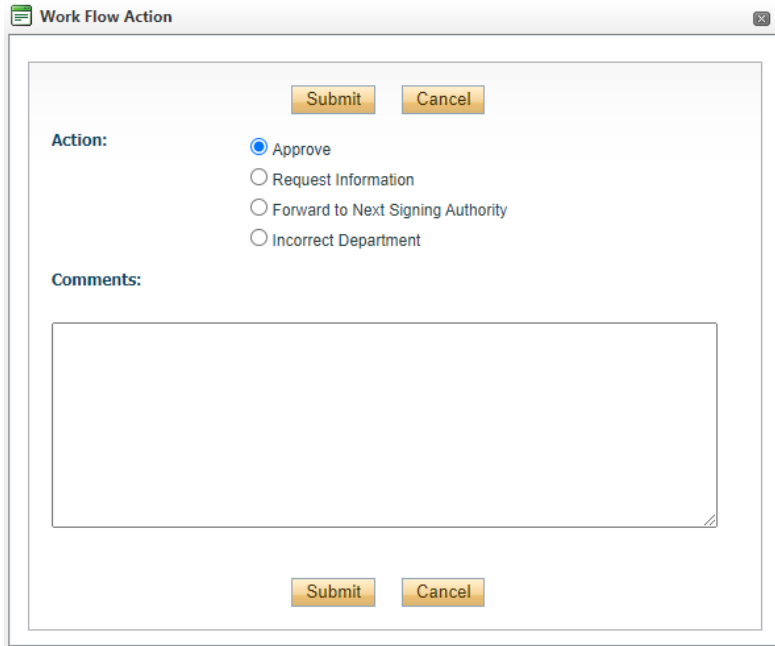
2. To approve, click “Review”

	File No
	<input type="text"/> ▼
Review Latest Workflow	Ref No : 15830

3. Review as needed and select “Approval Process” to submit your approval decision.

Approval Process	Close	Print	Export to Word	Export to PDF
Project Info	Project Team Info	Project Sponsor Info	Research GRANTS Approvals Form (

4. The “Request Information” and “Incorrect Department” options will send the application back to the PI, while the “Approve” and “Forward to Next Signing Authority” will forward the application to the next person in the approval process. In this window, you are required to enter comments before submitting.



Work Flow Action

Submit Cancel

Action:

- Approve
- Request Information
- Forward to Next Signing Authority
- Incorrect Department

Comments:

Submit Cancel

5. Click 'Submit'

Review Process

The committee review process is slightly different than the previously mentioned approval process but are accessed the same way through the researcher portal.

Role: Reviewer	
Applications: Chair	(0)
Applications: Reviewer (New)*	(16)
Applications: Reviewer (In Progress)	(1)
Events: Chair	(0)
Events: Reviewer (New)*	(9)
Events: Reviewer (In Progress)	(0)

1. Find the file that needs to be reviewed and click 'View'

View	601
------	-----

2. Ensure the file meets your standards and then click 'Review'

Close Print Export to Word Export to PDF Review

Event Info REB amendment application Attachments Logs Committee Reviews

3. Enter your comments, and then click 'Submit'

Save Submit Close

Comments*

B *I* U **A** ▾ [List Bulleted] [List Numbered] [List None]

Design HTML Preview

Event Forms

Initial Submission

Events forms are applications that are submitted under pre-existing files and are specific to the type of (parent) file which you are trying to submit it under. Compliance files will have its own selection of event forms specific to renewing, amending, or submitting final reports to REB, AUP or biosafety applications, while event forms under Award files are for amending agreements or making changing to funding accounts.

An Event form that has been started, but not submitted, may be opened directly from the Researcher Portal Home page by clicking **Events: Drafts**.

An Event form will be returned to the Principal Investigator and project team members if revisions are requested.

The Principal Investigator will receive a confirmation email in the following circumstances: after submitting an event form; if an event is returned to the project team for revision; or if an event form is re-submitted by the PI or a project team member.

To submit a new event form, login to the Researcher Portal. Then, navigate to:

1. Applications: Post Review



BACK TO HOME | Search | File No | [] | [] | APPLY NEW | News | Useful Links |

Role: Principal Investigator

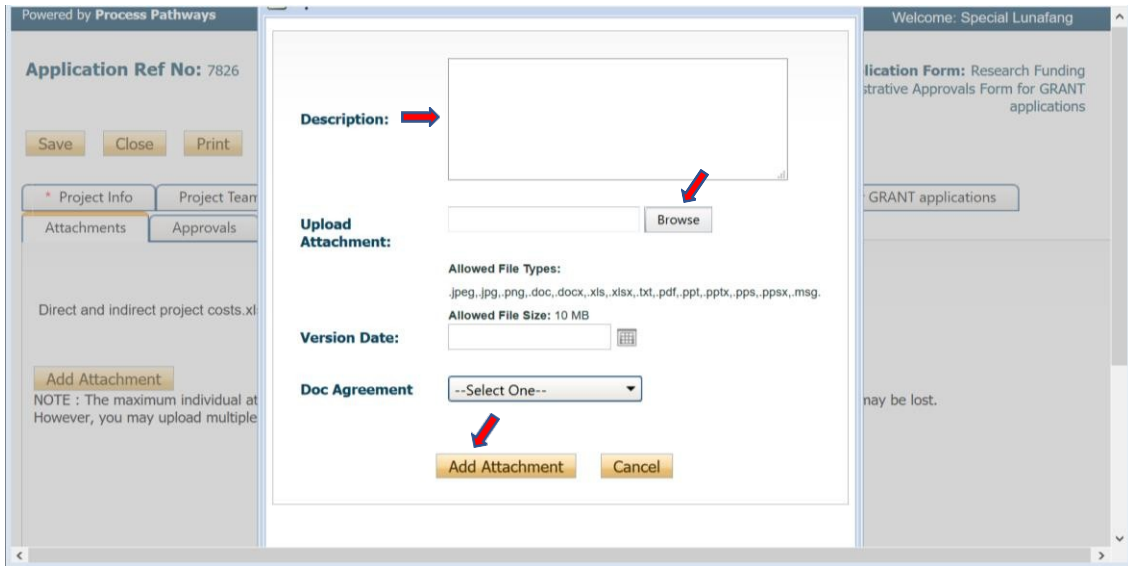
Applications: Drafts	(12)
Applications: Requiring Attention	(0)
Applications: Under Review	(2)
Applications: Post-Review	(2)
Applications: Withdrawn	(0)
Events: Drafts	(1)
Events: Requiring Attention	(0)
Reminders	(0)

2. Find the Awards or Compliance file you are looking to submit an event under, and click “Events” on the left

Application Type
All
Research GRANTS Approvals Form (rev Jan 2022) (Awards\Awards)
Research Funding Administrative Approvals Form for CONTRACTS (rev Dec 2020) (Awards\Awards)
Research Ethics Board protocol submission form (Certification\Human Ethics)

View	Events	6011
Latest Workflow		

- Choose the Events form needed. If the event form you are looking for is not listed, make sure you are in the correct file—Awards versus Certifications.
- Select the appropriate event form from the list of event forms and complete all fields. Mandatory fields have a **red asterisk (*)**.
- At any point in the process of completing the Event form, the form may be saved, closed and completed at a later date. The information entered will be saved and the event form can be accessed through the link *Events: Drafts* (in the list of options beneath *Role: Principal Investigator*).
- Upload any revised or additional, required documentation in the *Attachments* tab. Multiple documents can be attached, but each individual attachment must be no larger than 10MB. Attachments may be added as Word documents, Excel spreadsheets, JPEG files, PDFs, etc. Click on the Browse button to find and select the file that you wish to attach. Then click on the *Add Attachment* button to upload the file. Adding a brief description of the file in the top box (*Description*) may be helpful but it is not required. Click on the drop down box for *Doc Agreement* to select the type of document that is being attached. Remember to click **Save**.

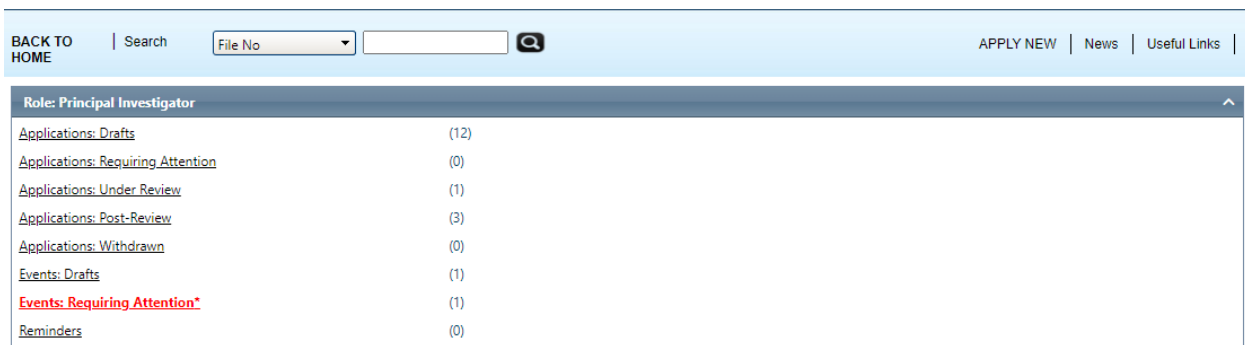


7.

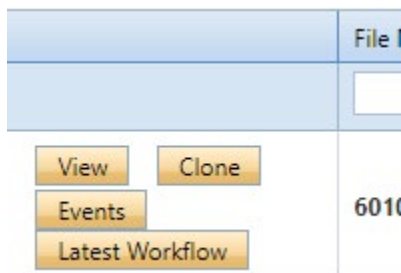
Revisions

You may be asked to revise a submitted event form to fix incorrect or inaccurate information, or to add missing information. This is more commonly seen with Compliance files compared to Awards files. To revise your form:

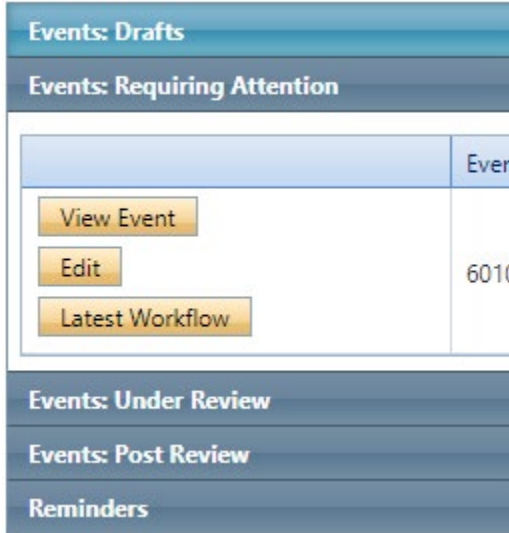
1. Click Events: Requiring Attention from the home screen



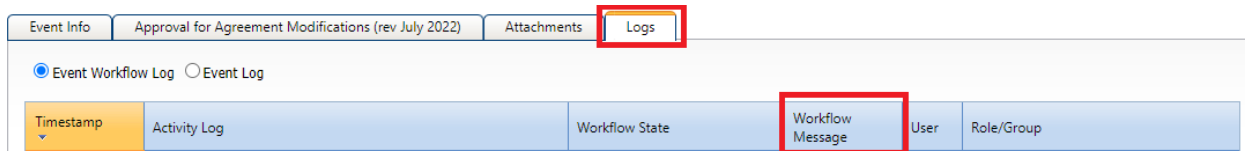
2. From the files listed, click Events



3. Then click “Edit” under the section “Events: Requiring Attention”



4. Comments around what information needs to be updated on your form is usually sent to you via email, but can also be found in the file under Logs > Workflow Message if uploaded by the reviewer



5. Once you have completed your updates, click “Re-Submit” to sent it back for review. Resubmissions can also be saved and submitted later.

