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ROMEIO Research Portal General Navigation User Guide

Research Services Group | December 2019

Audience: for principal investigators and project team members
accessing the ROMEIO researcher portal.

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This **General User Guide** has been developed by the Research Services Group to welcome you to the new StFX ROMEO Researcher Portal. The Researcher Portal, is a web interface to streamline the submission for approval processes for our research community.

In addition to this guide, the RSG will conduct training and provide ongoing support for portal users. Should you require assistance with the Researcher Portal, helpful resources are available on our [website](#).

Some of the key benefits in using the researcher portal are:

1. Access online, anywhere at anytime.
2. Greater control over process times and ease of administrative burden
3. Accessibility to one's individual research application and certification histories
4. Online reviews, electronic tracking, milestone creation and automatic reminders
5. Online collaboration with project teams.
6. Reporting for statistical and quality assurance purposes

Please share this guide with your colleagues, students and research assistants, as widespread adoption is fundamental to the ongoing development of research management at St. Francis Xavier University.

Thank you,
Research Services Group.



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Browser Compatibility:

Both Windows and Mac operating systems will support the ROMEO Researcher Portal platform.

Compatible Browsers include:

- Google Chrome (Windows and Mac)
- Mozilla Firefox (Windows)
- Safari (Mac)

Data Loss and System Errors

- The ROMEO Researcher Portal **does not** have an auto-save feature. To avoid any data loss, **save your work regularly** and before completing the next tab.
- **Do NOT** use the browser's back button as errors can occur and data may be lost.
- **Do NOT** use the symbols (< or >) in your entries, these symbols are not supported by ROMEO and may result in error messages or lost data.
- Always LOG OUT. If you do not log out before closing the browser, your user and applications may become locked and inaccessible to other team members, reviewers and signing authorities.
 - To correct this, please send a message to romeo@stfx.ca and ask for your username/application to be unlocked manually.




Where and How to Access the Researcher Portal?

To access the researcher portal. Click [here](#):

**** BOOKMARK THIS PAGE FOR FUTURE USE ****

- Enter your username (your **StFX email** address) and password (this password is unique to the ROMEO system and does not have to be the same as your webfx password..)
- If this is your first time logging into the system, please select **reset password**.
- For users with no StFX email address, external applicants, or a new faculty member, student, co-applicant, research assistant, etc. Please select **register**.

Login 


Username * **Required**

Password

Login Register Reset Password

There is a Guide available for your use on this page:

Self Registration

 [Click here for guide](#)



Where and How to Access the Researcher Portal? – Self Registration

Please note: if you encounter any problems or have any questions, please contact your ROMEO System Administrator, Natasha Neal at 902-867-4123 or by email at romeo@stfx.ca

- Enter all the requested information (fields marked with a **red asterisk** are mandatory).
- Select the **Add New Button** and choose from the drop down list for **DEPARTMENT**.
- If you are external to the university (not a student, faculty member or staff) please choose the option for **External – Canada or External – International**. If your institution is not listed, email romeo@stfx.ca and ask for it to be added to your profile record.
- You will receive an email to confirm your registration. The username and confirmation code are provided in this email.

Prefix/Last Name *:

First Name*:

Email*:

Country: Canada

Institution:

Address:

Comments:

Phone1:

Phone2:

Fax:

Position:

Alternate Address:

Add New

Affiliations *	Level	Unit	Primary
No records to display.			

Register **Back**



Navigating the Researcher Portal – Home Page

At the top right corner of the webpage you will find the **Top Navigation menu**.




- **Home:** click to return to the portal home page at any time
- **My Profile:** click to view your Researcher Portal profile – **please note** – **do not change** any out of date or incorrect email or affiliations. To ensure system and data integrity, email the [system administrator](#) to request changes to this information.
- **Contact Us:** click for system administrator contact details.
- **Logout:** click to exit the Researcher Portal correctly.

Below the logo you will find the **middle navigation menus**.

BACK TO HOME

| Search

Search Function

File No 

APPLY NEW

| News

| Useful Links

- **Apply New:** click to see the available application forms and start a new application.
- **News:** view the latest research news posted by the St. Francis Xavier University.
- **Useful Links:** view resources commonly used by researchers, such as University policies, external granting policies and guidance documents.
- **Back to Home:** click to return to the home page.
- **Search function: File No (dropdown)** - choose from the drop down menu to select what type of record you would like to search by and insert the file number in the box beside it – click on the **looking glass** to complete the search functions.



Navigating the Researcher Portal – Roles

The number of roles a user will see depends on what their assigned role is in the application and approval process. Only the **roles that are relevant** to your work will appear on your Researcher Portal Home Page. **Click on the specific Role to expand the menu.**

Role: Principal Investigator
Role: Project Team Member
Role: Reviewer

Role: Principal Investigator	
Applications: Drafts	(0)
Applications: Requiring Attention	(0)
Applications: Under Review	(1)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)
Role: Project Team Member	
Role: Reviewer	
Applications: Chair	(0)
Applications: Reviewer (New)*	(1)
Applications: Reviewer (In Progress)	(0)
Events: Chair	(0)
Events: Reviewer (New)	(0)
Events: Reviewer (In Progress)	(0)

The quick links will help you navigate the usage of the portal for each specific role.

- **Principal Investigator:** contains links to application forms or event forms in which you are listed as the PI. You can clone, edit or delete any application forms when listed as a PI.
PLEASE NOTE: Only the PI can submit an application.
- **Project Team Member:** links to applications or events in which you are a Project Team Member, such as supervisor, co-applicant, co-principal investigator, etc. All Project Team Members can contribute to an application prior to submission, however, they **cannot submit an application!**
- **Reviewer:** links to applications and events that you have been assigned as a reviewer. Here you can review and submit feedback for specific files.



LOG OUT !

Please **do not forget** to log out of the system. Failure to do so before closing the browser may result in locked files, or applications being inaccessible to other team members.

CONTACT US

The **Research Services Group** will maintain and update FAQs, User Guides, and other Research Portal support documents via their website.

We are committed to helping maintain a useful and simple system. If you have suggestions, improvements or general comments, please reach out via romeo@stfx.ca – your input is always welcome!