ROMEO Researcher Portal
Post Review Guide
(Event Submissions)

Research Services Group | December 2019

Audience: for principal investigators and project team members managing their grants, awards or contracts through the ROMEO researcher portal.

This **Post-Review Guide** has been developed by the [Research Services Group](#) to assist you in navigating the functions of the ROMEO Researcher Portal to clone applications, create event forms and manage other post-award activities.

Log into the ROMEO Researcher Portal [here](#).

What is an Event Form? – these forms are submitted by the Principal Investigator (PI) or Project Team Members at some point **AFTER** an application has been approved and is active.

Event Forms are <u>linked</u> to specific project files / records. For example, a *Request for Modification event form* is initiated by the PI or Project Team member where an *End of Project Report event form* is required by the RSG, and the system sends reminders requesting the completion of the event.

Approved Applications:

Approved applications appear in the Researcher Portal home page under the Role Block for Principal Investigators (PIs) and Project Team Members.

Under this link, all post-review awards and ethics applications are in read-only format.

However, from here team members are able to submit Event forms for these files. Applications can also be cloned from these links to create a new file.

Please note: Legacy applications (those entered by RSG manually) prior to the portal implementation cannot be cloned.

The **view button** provides read only access to the application. In this mode you will still have access to the application tabs, and you can export the application to WORD or PDF.

BACK TO HOME	Search	File No			
Role: Principal Investigator					
Applications: Drafts					(2)
Applications: Requiring Attention					(0)
Applications: Under Review					(2)
Applications: Post-Review					(1)
Applications: Withdrawn					(0)
Events: Drafts					(0)
Events: Requiring Attention					(0)
Reminders					(0)

View   Events
Latest Workflow

File No: 24288   **Project Title:** Hockey is great   **Project Work Flow State:** Approval Decision Made

Close   Print   Export to Word   Export to PDF

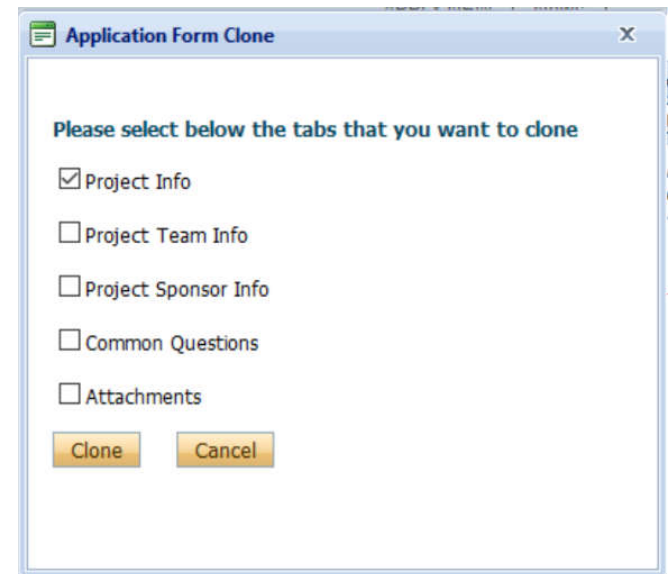View mode. Changes cannot be saved.

Cloning an Application:

The **Clone button** allows the user to create a new application based on information copied from the tabs on an existing application.

When you select the **Clone button** an **Application Form Clone pop-up box** will appear.

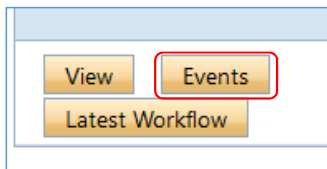Here you can select the tab information that you wish to clone into the new application.

EVENTS: Managing Application Events post-review

Events: Activities that occur to an application **after** they have been reviewed, activated or awarded.

- Event forms are used via the Researcher Portal and are designed to manage such post-award activities

- The Event forms are submitted via the Researcher Portal in a similar manner to the application form.

- Each Event form is also defined by an electronic workflow. The administrator of the Event forms will respond to the Principal Investigator and Project Team once a decision has been made, or if revisions are required.

- Unlike the application forms, <u>any named Project Team Member</u> is able to submit an Event form.

Click on the **Events** button to open the Events page. Here you will see all relevant Event forms users can create and manage per application.

Create New Event	
Event Form Name	**Description**
Early Release of Funds Request	To request the use of specific eligible expenses before obtaining approval for research requiring ethical certifications (human, animal, indigenous, biosafety, etc.)
External Grant or Contract Application	
Transfer of Funds Request	To facilitate the transfer of funds from your StFX Research Account to another institution. Please note, the RSG will determine if a transfer of funds is the most appropriate process and will communicate the decision to you.
Transfer of Equipment Request	To facilitate the transfer of research equipment to another institution.

EVENTS: Managing Application Events post-review - Continued

At the bottom of the Event Screen, users are able to view all the specific **Event links** for that particular file. These links look similar to the Role Blocks on the Researcher Portal home page.

File No: 24288

Principal Investigator: Mrs. Natasha Neal

Project Title: Hockey is great

- Events: Drafts
- Events: Requiring Attention
- Events: Under Review
- Events: Post Review
- Reminders

Events: Drafts – contains event forms currently in progress, which are saved but not yet submitted for review. Event forms here can be edited by the PI or Project Team Members.

Events: Requiring Attention – contains event forms returned to the PI/Project Team by administrators / reviewers for revisions. Both the PI and Project Team can edit these forms.

Events: Under Review – contains event forms submitted by the PI/Project Team that are under review. These are read-only and cannot be edited.

Events: Post Review – contains event forms that were already reviewed. These are read-only and cannot be edited.

Reminders – contains any reminders for upcoming event forms for this particular application.

EVENTS: Viewing Submitted Events and Submitting a New Event Form

Previously reviewed Events are found under the **Event Block Events: Post Review**. Select **View Event** to open an Event or **Latest Workflow** for the logs/communications.

		Event No	Event Category	Event Submission Date	Event Status
View Event / Latest Workflow		24288 - **98395**	New Approval Process (N/A)	2019/10/21	Approved

Events: Post Review

To create a new **Event Form**, select the appropriate Event Form from the drop-down list on the Events page.

Event Form Name	Description
Early Release of Funds Request	To request the use of specific eligible expenses before obtaining approval for research requiring ethical certifications (human, animal, indigenous, biosafety, etc.)
External Grant or Contract Application	
Transfer of Funds Request	To facilitate the transfer of funds from your StFX Research Account to another institution. Please note, the RSG will determine if a transfer of funds is the most appropriate process and will communicate the decision to you.
Transfer of Equipment Request	To facilitate the transfer of research equipment to another institution.
NS Graduate Scholarship Application Form	
NS Graduate Scholarship Annual Report	All current holders of NS Graduate Scholarships must complete this form. Application deadline: 12:00 noon February 15 each year. When this date falls on a weekend or holiday, applications are due by 12:00 noon the following business day. Note: To request renewal of your NS Graduate Scholarship you must first complete and submit this form and then complete and submit Renewal Form.
NS Graduate Scholarship Renewal Form	Complete this form to request renewal of your NS Graduate Scholarship for the coming academic year. In order to be considered you must also complete and submit the Annual Report form at the same time. Application deadline: 12:00 noon February 15 each year. When this date falls on a weekend or holiday, applications are due by 12:00 noon the following business day.
UCR Internal Application Form	
UCR Final Report	

EVENTS: Submitting a New Event Form Continued

On the Event Form page you will see the **Event Form Tabs**, which contain fields for completion before submitting the **Event form**. The tab with a red asterisk * indicates that there are required fields. When all information is provided the asterisk will disappear.

Always click the Save button after completing each tab!

EVENTS: Event Info Tab & Custom Question Tab

Event Info Tab: allows the PI or Project Team Member to include any additional information about the event form. It is recommended that this tab be completed after finishing the event form.

Custom Questions Tab: this tab changes its title depending on the Event Form you are submitting. The red asterisk * indicates there is required information included in the subtabs.

Always click the Save button after completing each tab!

EVENTS: Attachments Tab

Attachments Tab: allows the PI or Project Team Member to upload any necessary supporting documents associated with the Event form. Please note, depending on the specific Event form, there may be specific instructions or downloads available to use and re-upload for submission.

Click on the **Add Attachment button** to upload and please also note that there are file size limits per file.

Preferred File Naming Schema: please use the file naming schema below to ensure consistency across applications and to easily identify the document.

Last Name, First Name – Agency Program – File Type – Date

for example:

- Neal, Natasha – NSERC DG App – Nov 26-19
- Neal, Natasha – NSERC DG CV – Nov 26-19

Always click the Save button after completing each tab!

Event: Transfer of Funds Request   File No: 24288 - Ref No : 4
PI : Neal Natasha(Research Services Group\Research Grants Office)
Project Title : Hockey is great

| Save | Close | Print | Export to Word | Export to PDF | Submit |

Event Info | * Transfer of Funds Request | Attachments | Logs | Errors

Note(s)

Add Attachment

NOTE : The maximum individual attachment size is 10MB. All attachments larger than 10MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 10MB.

EVENTS: Logs Tab

This tab allows the PI or Project Team Member to view all actions on an Event form. There are two views in which to choose under the **Logs Tab**:

- **Event Workflow Log** – users track the history of the event. The Researcher Portal tracks and timestamps approvals/messages between the PI and the Research Services group/other administrators

- **Event Log** – users can view all changes made to the form. It is the PI's responsibility to review this log to ensure they are aware of all the changes made by Project Team Members prior to submitting the event.

| Event Info | * Transfer of Funds Request | Attachments | Logs | Errors |

● Event Workflow Log ○ Event Log

Timestamp ▼	Activity Log	Workflow State	Workflow Message	User	Role/Group
No records to display.					

| Event Info | * Transfer of Funds Request | Attachments | Logs | Errors |

○ Event Workflow Log ● Event Log

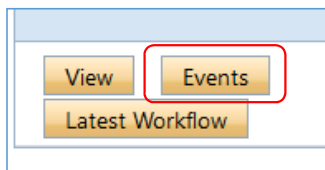| Timestamp ▼	Log Activity	User
2019/12/17 09:34	New Event Created	Natasha Neal (su_neal)

EVENTS: Errors Tab, Saving & Retrieving an Event Form

Errors Tab: this tab appears when any required information has not been completed. Clicking on the tab will show you what errors are required to fix. This tab will disappear when the errors are rectified.

Event: Transfer of Funds Request   **File No:** 24288 - Ref No : 4
PI : Neal Natasha(Research Services Group\Research Grants Office)
Project Title : Hockey is great

| Save | Close | Print | Export to Word | Export to PDF | Submit |

| Event Info | * Transfer of Funds Request | Attachments | Logs | Errors |

Note(s)

Saving an Event Form: you may wish to edit or submit the **Event form** at a later date, if so, click the **Save** button to ensure your edits are retained.

After saving you can select the **Close** button to leave the **Event form screen**.

Retrieving an Event Form: to select a saved Event form, select **Events: Drafts** under your Role Block from the home screen. Then select the **Events** button.

| View | Events |
| Latest Workflow |

BACK TO HOME | Search   File No

Role: Principal Investigator

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

EVENTS: Retrieving Saved Event Forms - Continued

Selecting the **Events** button will bring you to the **Events Links** page. From here, select **Events: Drafts** to view all of the available and not yet submitted events. Select **Edit** to open an event and keep working on it.

When you have completed the **Event form**, select the **Submit** button.


A **Workflow Action** window will appear. You will need to add some text in

the **comments field** to complete the submission. A simple Thank you will suffice.

Event forms requiring attention:

When an Event Form requires a revision, it will be returned through the system via the Research Services Group to the PI. In the role blocks, the PI or Project Team Members can view this via the quick link **Events: Requiring Attention.** This will be bolded and in **red font**.

Clicking the quick link will take the user back to the screen in which the **Events button** can be selected to edit and resubmit the **Event form** once the changes have been completed.
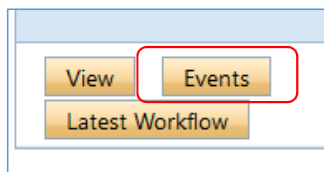
When editing the **Event Form**, please refer to the **Logs Tab**.

The **Event Workflow Log** will show any messages that pertain to the revisions required. Once editing is completed, the **Submit button** will change to **Resubmit**.

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!