



ROMEIO Research Portal FAQs

What is the ROMEIO Researcher Portal?

ROMEIO is a digital management and reporting database for all internal and external research funding and certifications. The researcher portal is a module that expands upon the existing database, by facilitating online access to allow researchers and administrators the ability to create, manage, collaborate, edit, review and submit applications online. These applications are supported in the system through an efficient electronic workflow.

Which browser(s) are compatible with the ROMEIO Researcher Portal?

The ROMEIO Researcher Portal is compatible with Google Chrome, Mozilla Firefox and Safari.

How do I access the Researcher Portal?

The Researcher Portal login is located on the Research Services Group [website](#). In turn, you should bookmark the page for future use.

How do I receive training on the portal?

As a first step, please read the **user guides** found on our [website](#). For any further clarification or training sessions related to the researcher portal, you can contact either the System Administrator [Natasha Neal](#) or alternatively, [David Bruce](#) with the Research Services Group.

What are the password requirements?

The ROMEIO Researcher Portal employs strict password rules. Passwords must meet the minimum requirements:

- 8-16 characters in length
- 1 uppercase letter
- 1 lowercase letter
- 1 numerical base (0-9)

We recommend changing your password on a regular basis, and you should never give out your password to anyone. Your password and corresponding ROMEIO profile is unique to you and the files you are associated with, sharing your credentials is **not recommended**.

I forgot my password, what do I do?

Go to the ROMEO Researcher Portal website and click **Reset Password**. Follow the instructions provided. If you have any issues, please email romeo@stfx.ca for help.

How do I update my Profile information in the Researcher Portal?

There are two options for researchers to update their information.

- **Portal home page** – changes made here will be applied to all future applications unless amended. Select “My Profile” in the top right corner and update fields as appropriate.
- **Email the System Administrator** – for data integrity purposes, the departmental affiliation and email address of each user must be set and maintained by the Portal’s System Administrator. If you need to change these aspects of your profile, please email romeo@stfx.ca.

What is the timeout period for inactivity?

The ROMEO Researcher Portal has a time-out setting of **2 hours**. Please ensure that you save all information entered once completed. If you are experiencing what appears to be a system time-out in a shorter window, first verify that you are not experiencing intermittent or weak internet connectivity, and you are not allowing your PC, laptop or tablet to enter sleep mode while logged into the portal.

My file is locked – what do I do?

Multiple users can view one file simultaneously, however only one user can edit the file at a time. If the file is being edited, ROMEO locks other users from the file. Once the user saves and exits the file, another user is able to edit it.

However, if a file is not saved or closed properly, it can remain locked and has to be manually released by either the user who locked the file or the Portal’s System Administrator.

Please contact your team member and ask them to log in again, access the file and save/close it properly. If you are unable to contact the team member, and you have an urgent need to access the file, please send an email to romeo@stfx.ca for help.

How do I add Project Team Members after submitting an application?

Once you submit an application, it is locked for review. If you need to add another team member to the file, you can contact romeo@stfx.ca and provide the relevant information. The System Administrator will update the file, or provide you with any further steps required.

What team members should I add to my application?

We understand that there can be multiple team members on an application. Rule of thumb is to add anyone that needs access to the application. All team members added to an application will be able to view the files associated with the application and make changes if required (before submission). If collaborators are external to StFX, you may need to ask them to register a [StFX ROMEO](#) profile in the system. Please contact romeo@stfx.ca if you have any questions regarding the registration process.

How do I add research team members who are not from St. Francis Xavier University?

When adding project team members, use the “Search” function to determine if the member is already entered into the Investigator Master Record (IMR).

If the member does not appear, you can ask them to create a ROMEO Researcher Portal profile by clicking [here](#).

What are the rules around submitting an application?

Only the Principal Investigator (PI) listed on the application form is able to submit the application. In submitting the application, the PI is accepting full responsibility for the contents of the application and the research.

However, any team member is able to initiate or complete the application form and upload necessary documents to the file. It is important, that the person filling out the form (if not the PI) changes the role of the PI to the official designated researcher, and then add themselves as a Project Team Member in order to complete working on the application.

Each Project Team Member listed on the application is able to make changes to the application form before it has been submitted by the PI. Once the PI submits the application, it is locked for editing, and unless it is sent back for revisions, no other edits are allowed.

Please remember to save regularly! In addition, when you save and close out of an application, the draft application will be under the specific role block of each Project Team Member to view.

I saved the file, but still lost information – why?

Unfortunately, data loss and errors can happen if using unsupported navigation symbols when completing a form in the portal. In order to avoid data loss, here are some simple rules:

- Do not open multiple sessions of the portal
- Use only the navigation buttons in the portal and avoid the use of the browser’s back and forward navigations
- Do not enter the symbols “< or >” when entering data into the form.

Can I withdraw an already submitted application form?

During pre-submission, the PI can withdraw an application by clicking on **Applications: Drafts**, then click “edit” to enter the file and click “withdraw”

After submission – the PI must contact the Portal’s System Administrator to withdraw an application. Email either, [Natasha Neal](#) or [David Bruce](#) and provide the appropriate information such as, form name, reference number or file number you want to withdraw.

What is a File Number and a Reference Number, are they the same thing?

No. All newly created applications are assigned a reference number. Once an application has cleared all signing authority approvals (if applicable), the reference number will turn into a file number. Reference numbers are assigned during *pre-approval* and file numbers are assigned at the *post-approval* stage.

What is a Signing Authority?

Some applications require a Signing Authority approval, which is routed automatically.

A Signing Authority is either a Chair, Department Head or Dean assigned to a particular department, school or program. Signing Authorities permissions are managed by the Researcher Portal System Administrator, and only changed upon appropriate request.

Any profile in the system can be designated as a signing authority, when appropriate, and the user would find the files associated under their Role Blocks on the home page of the portal.

It is up to the discretion of the faculty and department on how they wish to structure the signing authorities via ROMEO and the process.

Please view the [Signing Authority guide](#) for more details.

Will my application be accepted without a signature?

The Researcher Portal uses electronic signatures via a secure login framework. Signing Authorities are recognized as having endorsed or approved a document or taken formal action on the application when they select the SUBMIT button on the workflow action dialogue box for the Approval Process.

Not all applications in the portal require a signing authority workflow, in these cases, the administrator of those applications (mainly the Research Services Group) will approve the applications being submitted.

If you have further questions regarding signatories/requirements on external or internal applications submitted through the portal, please contact [David Bruce](#).

I have large attachments to upload to my application – are there limits?

The maximum file size (per file) is **10MB**. If the file is larger, try resizing it when you save the file (compressed pdf) or break the file into separate pieces, remembering to name them appropriately (e.g., Part 1 of 5)

Some other rules to follow for attachments:

- File names should never contain the following characters, “, % # * : < > ? / [] { } | ~ or periods (.)
- File names should not exceed 128 characters. The preferred file naming schema is outlined here: Last Name First Initial Agency Abbreviation Program Abbreviation File type and Date (example: **Neal N – NSERC DG – Final App – Oct 15-19**)

I have supporting documentation for my application – what do I do with it?

Any documents, such as letters of support that you want to include with the application can be uploaded to the application form via the **Attachments** tab. Usually, we ask that the documentation be uploaded and named appropriately in one pdf file. However, we recognize that some files, such as wav, mp3, etc. can also be attached.

When I export my application into Word or PDF – what is included?

Information from the **Project Info** tab, **Project Team Info** tab and the **Custom Questions** tab are included in the exported file. Each attachment that you uploaded must be downloaded separately from the **Attachments** tab. The system will not add your attachments to the exported files because there can be multiple formats.

I have started and saved an event form, but I do not think my work saved in the Researcher Portal. Why?

This can happen when the researcher initiates an event form repeatedly instead of accessing the saved draft event form.

Two common ways this can happen are:

1. when a researcher uses the Reminders link more than once to initiate an event form
2. when a researcher clicks on a Create New Event link for an event form instead of returning to a previously saved draft form

You may see multiple draft versions of the form if you have initiated the form multiple times. If so, you will need to select the draft you want to complete and submit. Please delete any unneeded drafts after submitting the completed version.

On the Researcher Portal homepage, when I click [Applications: Under Review](#) or [Applications: Post Review](#), I notice there are funding and / or ethics files already there. Why?

The ROMEO Researcher Portal is an extension module of an existing product that the Research Services Group, REB and Animal Care have been using for some time. If you have had submitted applications to our respective groups, you will see these files under the “*Applications: Post Review*” or the “*Applications: Under Review*” links on the Researcher Portal homepage. Depending when these groups adopted the Romeo software, some of your previous ethics or funding applications may be visible to you.

I am receiving an error message when trying to paste a large amount of text into a text box in an application/event. What is the issue?

An error message shows when the amount of text you are pasting exceeds the space limit of the text box. If your response exceeds the allowable characters, and a longer response is required, you can alternatively, upload a document (in Word or PDF format) to the Attachments tab and note in the text box that the response has been uploaded.

What is an Event?

An Event is an activity that occurs in relation to an application post-award. Event forms in the ROMEO Researcher Portal are designed to submit and manage these activities. In general, the event forms will be unique to an application.

Please note: any team member is able to submit an event form in the system.

For more information about event forms and submitting an event, please read our [post-review guide](#).

How do I retrieve information and files from older records?

Since the ROMEO Researcher Portal is an extension module of an existing product, you will be able to view and download attachments from older ROMEO files. To do so

- From the home screen click on **Applications Post-Review** under the most relevant Role Block.
- From this screen, you can either search for a specific reference number such as, File, Application Reference, Event, or Event Reference.
- You can also filter the files by File No, Project Title, Principal Investigator, Application Type or Status Snapshot.
- Clicking on the filter icon  will give you multiple options to limit the search.
- Click view once you find the correct file and from the next screen you will be able to navigate the record, view the information provided and download any available files from the Attachments tab.