

Romeo


How to Apply for a Real Estate Foundation of BC Partnering Fund Grant

Please note: Romeo is compatible with Internet Explorer, Firefox, Edge, and Google Chrome. Safari is NOT a recommended browser. If you have any problems or questions, please contact the Office of Research at 250-960-5852 or email researchportal@unbc.ca

1. To access Romeo, go to <https://unbc.researchservicesoffice.com> and click on “Researcher Portal.” You will also find a link to Romeo along with self-help and reference materials on the UNBC Office of Research website (www.unbc.ca/research).



2. Login using your UNBC email address (first name.last name@unbc.ca). If you are a first time Romeo user and do not have a password, or if you forgot your password, select “Reset Password” and follow the instructions to set/reset your password. If you do not have a Romeo account, please contact the Office of Research at 250-960-5852 or email researchportal@unbc.ca

 For access to the Research Portal, please contact a system administrator via researchportal@unbc.ca to create an account.

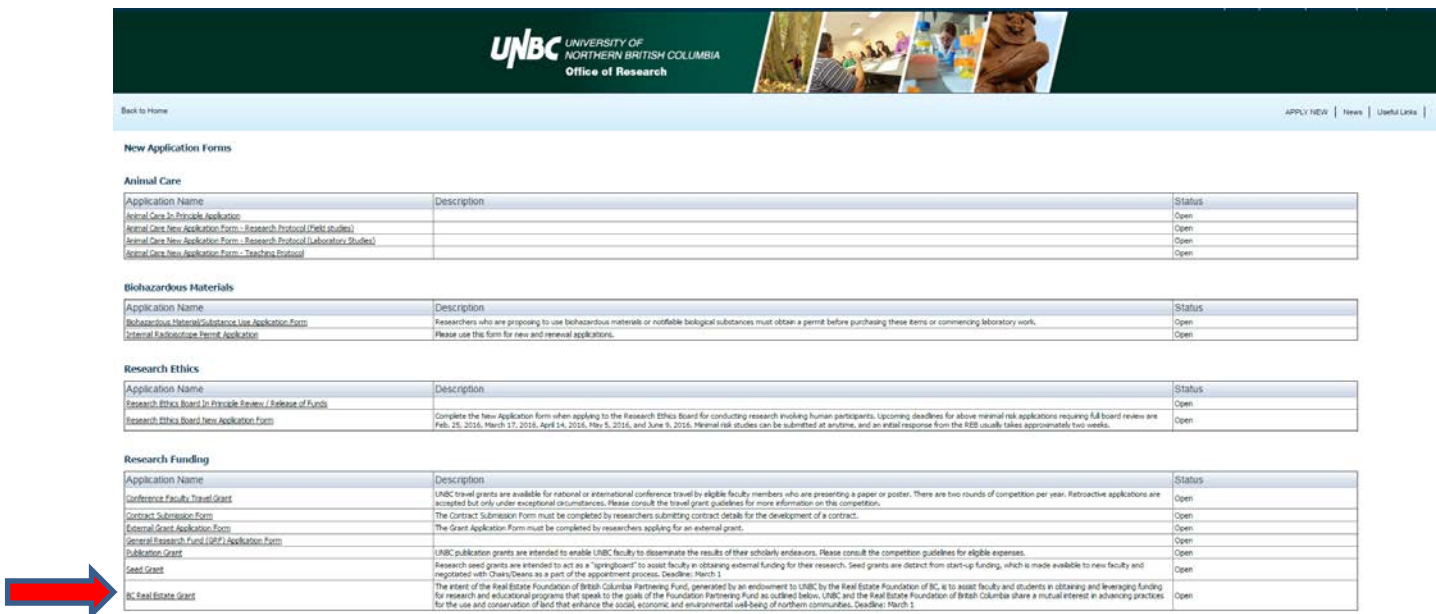
A screenshot of the Romeo login form. It features a "Login" button with a right-pointing arrow icon in the top right corner. Below this, there are two input fields: "Username" and "Password". At the bottom of the form, there are two buttons: "Login" and "Reset Password".

3. Once logged into Romeo, you will be brought to the Home page (see the example below).

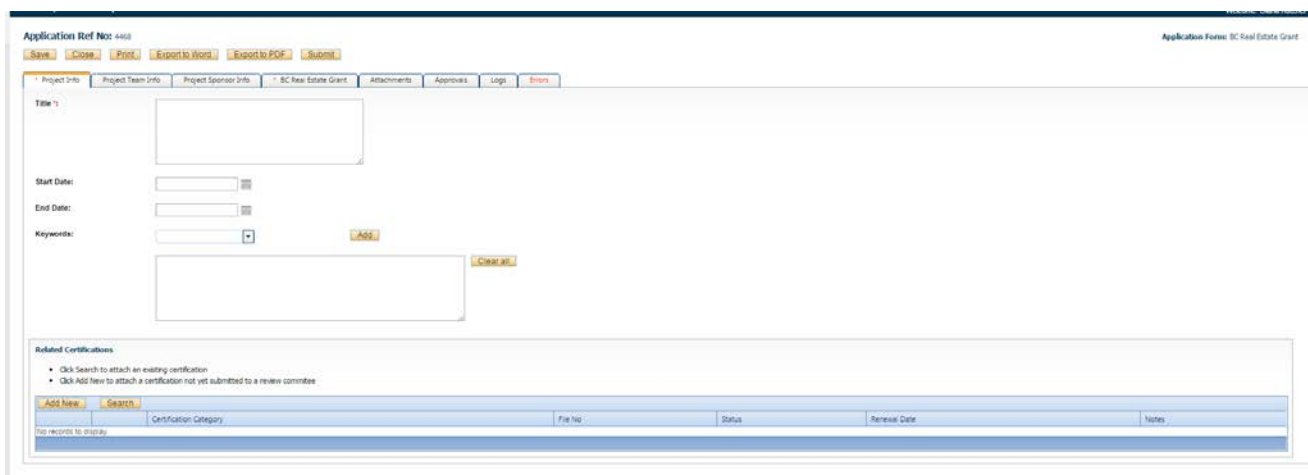


4. To access all application forms available on Romeo, click on “**APPLY NEW.**” You will be brought to a screen (similar to the one below), which lists all of the available online application forms. There are applications under four categories: Animal Care, Biohazardous Materials, Research Ethics, and Research Funding.

Under **Research Funding**, select the “**BC Real Estate Grant**”.



4. You will be brought to a screen similar to the one below.



5. Under the “**Project Info.**” tab, complete:

Title: title of the project.

Start date and end date: enter the proposed project start/end dates.

Keywords: provide any appropriate keywords (you can type or copy and paste keywords into the box instead of using the 'add' function).

Please note: fields marked with a red asterisk (*) are mandatory.

6. **Related Certifications:** If you require any certifications for this project, click on “**Add New**”. A small “**Project Certification**” window will open. Select the certification you require from the drop down list and click “**Save**”. You can add multiple certifications, as needed.

Select “**Save**” before moving to the next tab. At any time, you can save your application and continue working on it at a later time. It is always good practice to save your application before changing tabs or leaving the application for an extended period of time.

7. Proceed to the “**Project Team Info.**” tab. You will see a screen similar to the one below. The Principal Investigator information will auto-populate with your profile information. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If the PI is not from UNBC and is not already entered into the Investigator Master Record (IMR), please contact the Office of Research, provide them with the PI’s contact information and have them add the individual to the IMR. **Please note:** if you remove yourself as PI, you will need to add yourself as a project team member, otherwise you will no longer be able to access the application.

Check that your information is correct. Please contact the Office of Research if your profile information is incorrect or out-of-date.

Other Project Member Info: If applicable, click on “**Add New**” and search for and select from other researcher profiles. If the researcher is not on the list, please contact the Office of Research to have the investigator added to the Investigator Master Record (IMR) (please provide the Office with all of the contact information). Repeat this process for all additional team members.

Click on “**Save**” to save the information entered on this page.

Application Ref No: 4436

Application Form: External Grant Application Form

Project Team Info

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: Mrs. Last Name: Baller First Name: Nicole

Affiliation: College of Arts, Social and Health Sciences/Antropology

Rank: Institution: University of Northern Br.

Gender: Female

Phone1: 250-860-6518 Phone2: Email: nicole.baller@unbc.ca Fax: 250-860-4342

Primary Address: 1233 Dalmeida Way Prince George, BC V2N 6Z9 Alternate Address: Preferred Address: Primary Address Alternate Address Country: Canada

Comments:

Other Project Member Info:

Instructions: Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Add New

No records to display.	Last Name	First Name	Role In Project
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8. Next, proceed to the “**Project Sponsor Info.**” tab. You will see a screen similar to the one below. Click “**Add New.**”

Application Ref No: 4436

Application Form: External Grant Application Form

Project Sponsor Info

Click "Add New" to add funding details for this project.

Add New

No records to display.	Investigator	Agency	Program	Currency	Requested Amount
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If there are multiple sponsors/partner organizations for your project, you will need to repeat the process described below for each sponsor/partner organization.

Project Sponsor Edit

Agency: Agency

Program: Fiscal Year: Start Date: End Date: Competition Date: Currency Type: Canadian Dollars (CAD) Agency Reference No: Investigator: Mrs. Nicole Baller (Principal Investigator)

Comments:

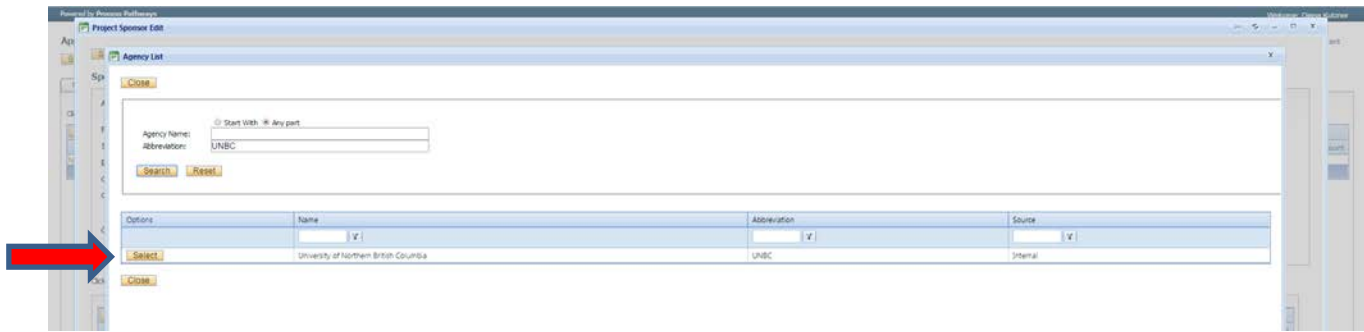
Click "Add New" to add funding disbursements(s).

Add New

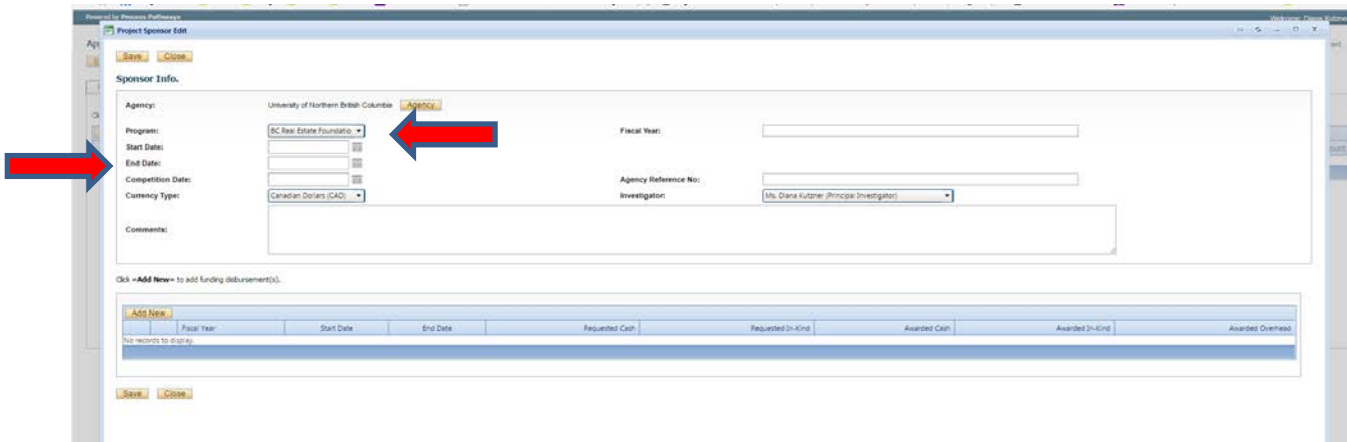
No records to display.	Fiscal Year	Start Date	End Date	Requested Cash	Requested In-Kind	Awarded Cash	Awarded In-Kind	Awarded Overhead
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Agency: Click on “Agency” and search for the funding agency you are applying to. You may conduct a search using the “Agency Name” or “Abbreviation” fields (e.g. UNBC). For this internal grant application, conduct a search for **UNBC** using the “Abbreviation” field.

Click on “**Select**” to choose **UNBC**.



Once you've selected UNBC, you will see a screen similar to the one below.



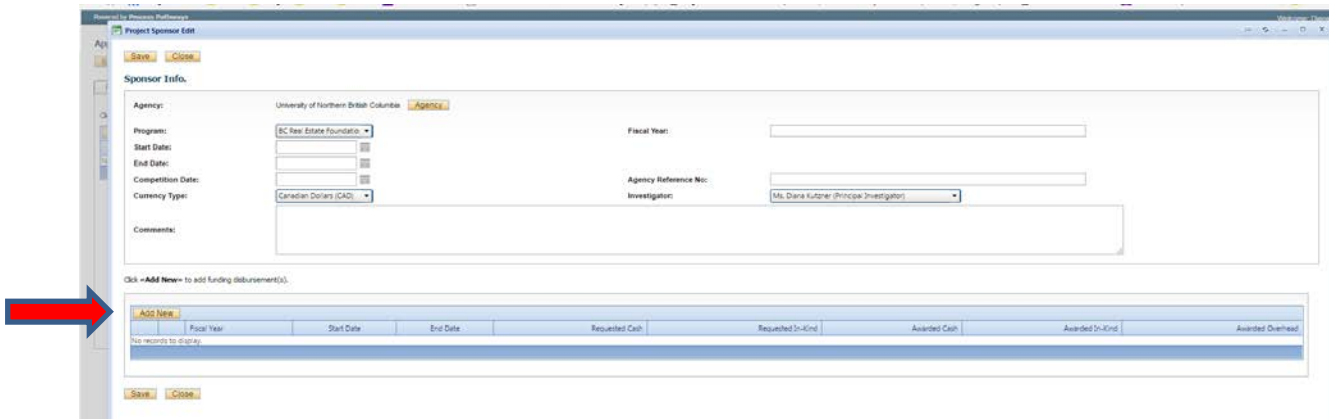
Program: Click on the drop-down list beside “Program” and select the program you are applying to (i.e., **BC Real Estate Foundation**).

Enter the anticipated **Start Date** and **End Date** of your proposed project.

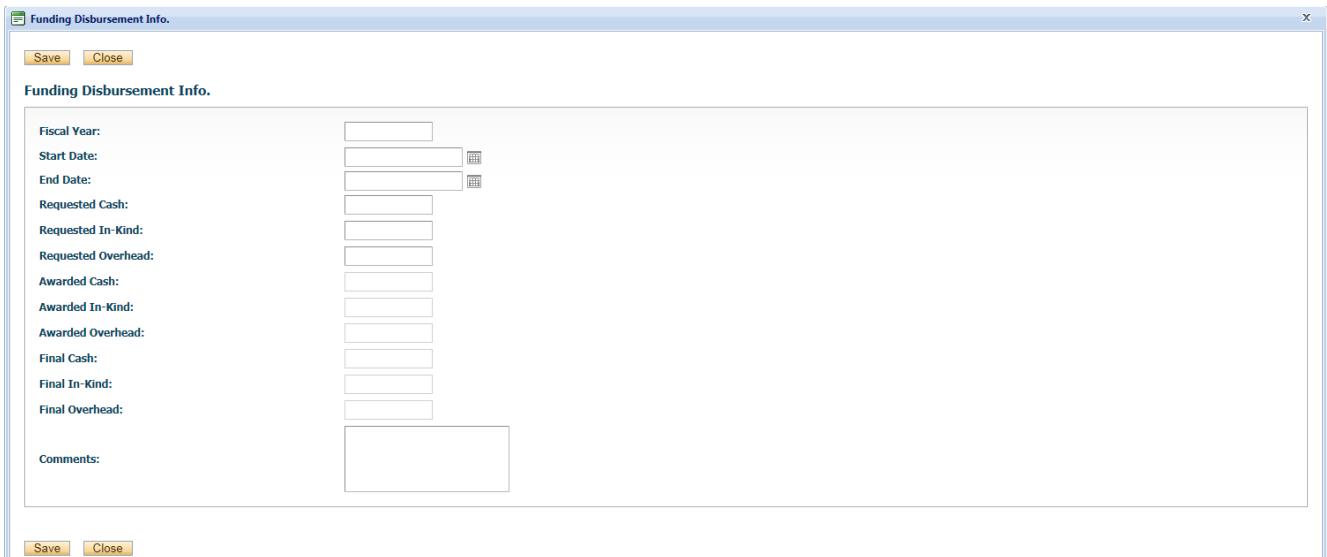
Enter the **grant application deadline**.


The **Currency Type** should always be **CAD**. If there are Sponsor-related comments that you would like to make, please do so in the “Comments” box. The Fiscal Year box will auto-populate when you enter the start and end dates. If there is more than one project team member, you will be able to select the investigator associated with the funding. The default is the PI. Click “Save”.

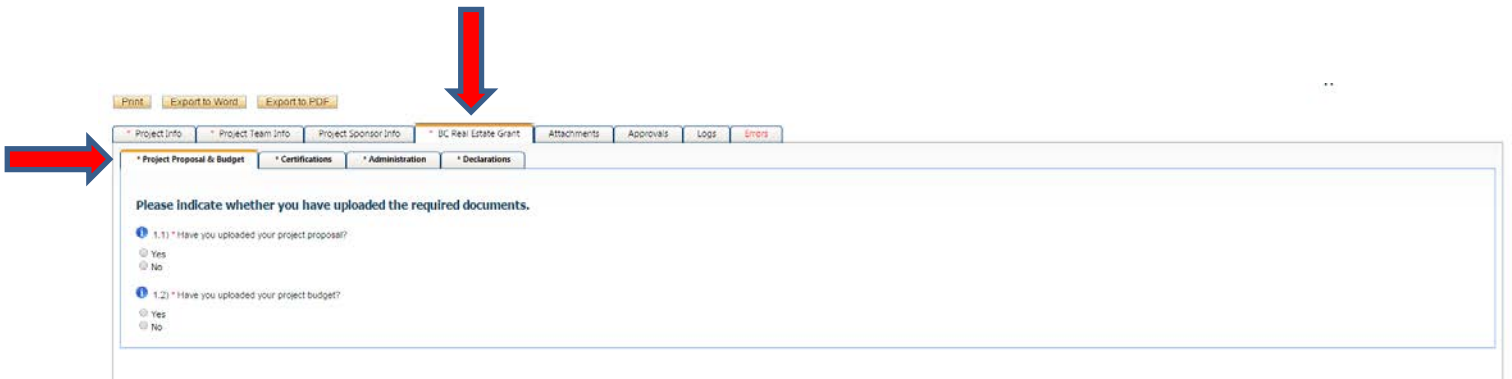
9. For each year of funding, enter a disbursement by clicking on “**Add New**”. For multi-year projects, you will need to enter a separate disbursement for each year of funding.



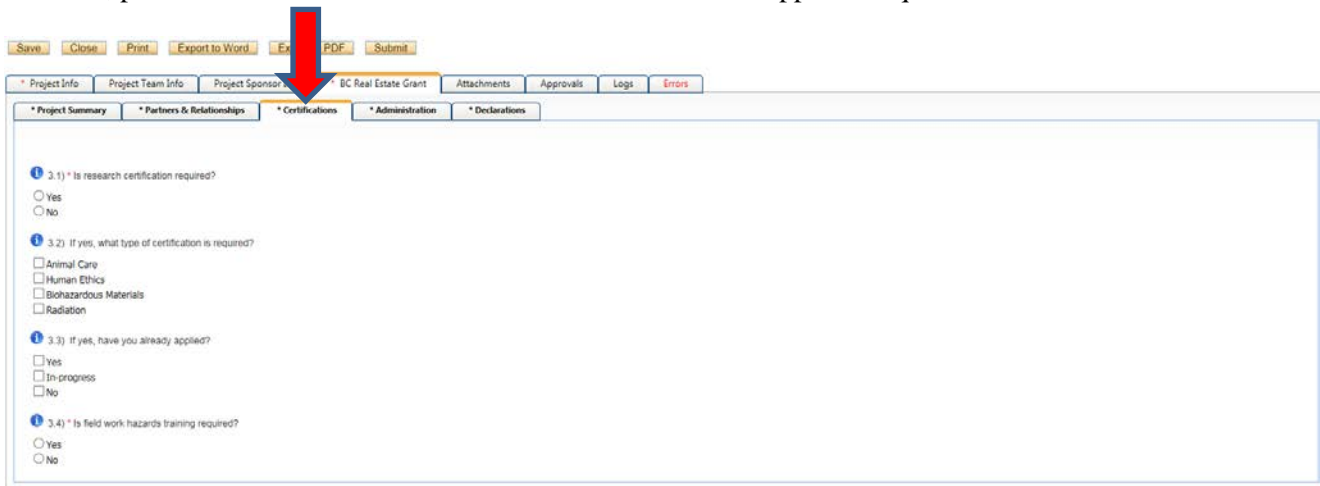
You will see a screen similar to the one below. Enter the start date and end date of your project. The fiscal year will automatically populate. Enter the requested amount of cash. Enter requested in-kind contributions (if applicable). Enter the overhead, if applicable. Enter any funding related comments you may have. Make sure to save your work before you exit the window.



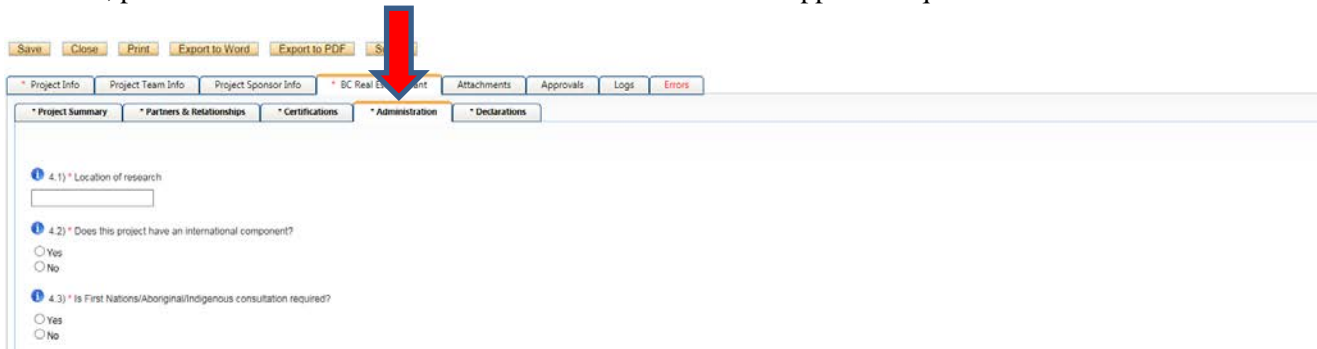
10. Next, proceed to the “**BC Real Estate Grant**” tab. The “**Project Proposal & Budget**” tab will open by default. The questions under this tab serve as a check / reminder to provide the required documents under the Attachments tab. Answer all of the applicable questions under this tab. Click on  for more information about a question.



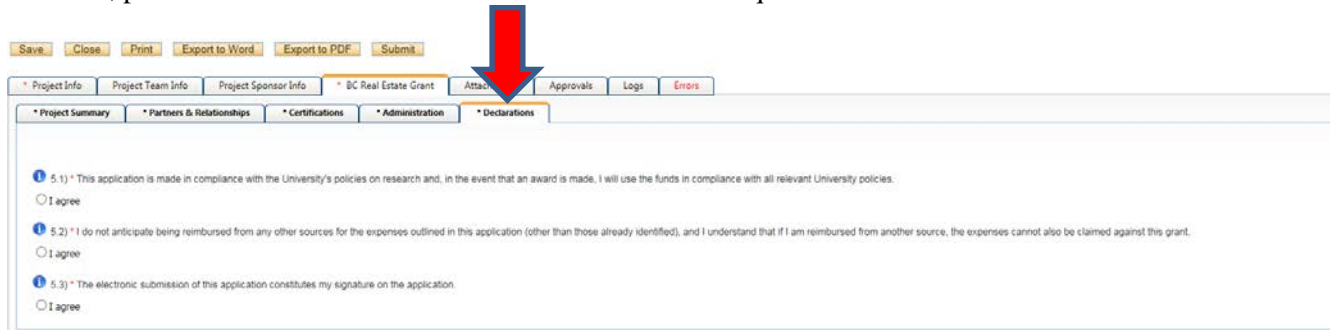
11. Next, proceed to the “**Certifications**” tab. Answer all of the applicable questions under this tab.



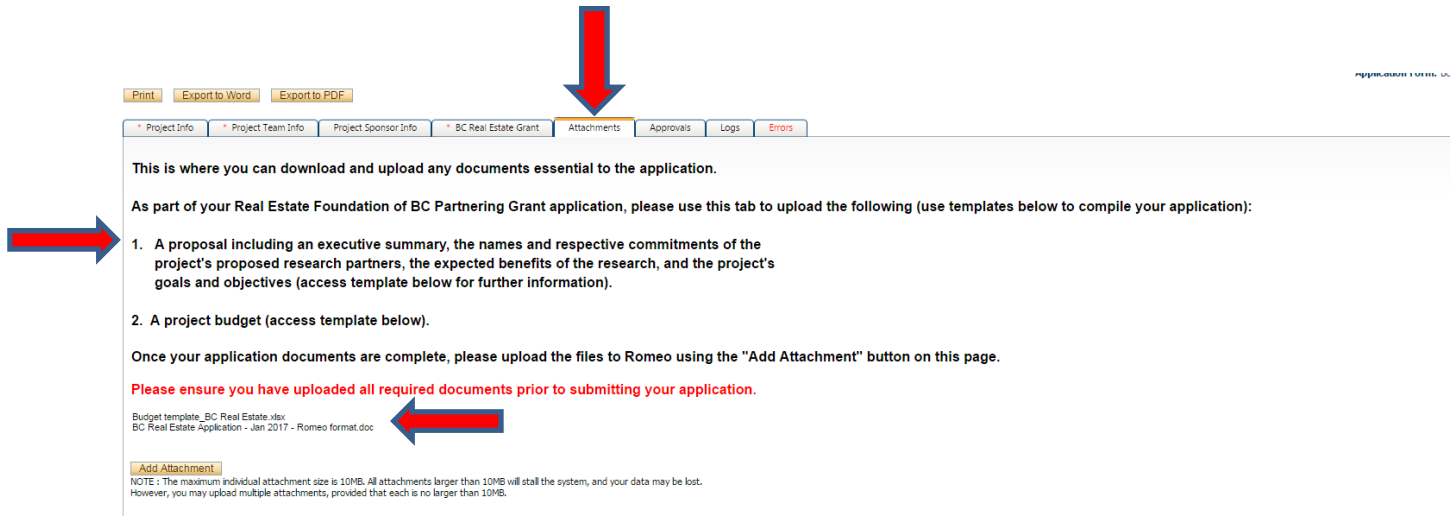
12. Next, proceed to the “**Administration**” tab. Answer all of the applicable questions under this tab.



13. Next, proceed to the “**Declarations**” tab. Answer all of the questions under this tab.



14. Next, proceed to the “**Attachments**” tab. You will see a screen similar to the one below.



This is where you can **download** and **upload** any documents essential to the application.

As part of your Real Estate Foundation of BC Partnering Grant application, please use this tab to download, complete, save and then upload the documents required for your application.

1. A **proposal** including an executive summary, the names and respective commitments of the project's proposed research partners, the expected benefits of the research, and the project's goals and objectives (access template and grant guidelines for further information).
2. A project budget (access template and guidelines for further information).

Once your application documents are complete, please upload the files to Romeo using the "**Add Attachment**" button on this page.

To upload your document: begin by clicking on “**Add Attachment**” (as in the screen below).

Browse for and upload your attachment. Enter the date of submission as the **version date**. Select the type of document you are uploading (Application, CV, etc.). Click on **“Add Attachment.”** Click on **“Save”** to save the information on this page.

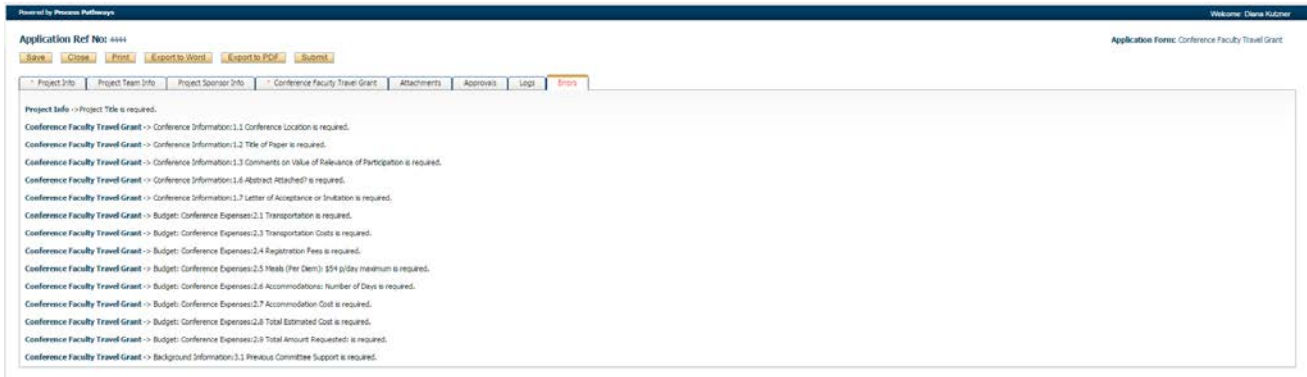
15. **“Approval”** tab. There is no information to be entered in this section. Applications are automatically routed to the next signing authority (as indicated).

Name	Active	Exceptions
Division Signing Authority	<input type="checkbox"/>	
Department Signing Authority	<input checked="" type="checkbox"/>	
Faculty Signing Authority	<input checked="" type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

16. **“Logs”** tab. There is no information to be entered in this section. You can toggle between “Application Workflow Log” and “Application Log” to see where your application is at in the approval process and to see any log activity.

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

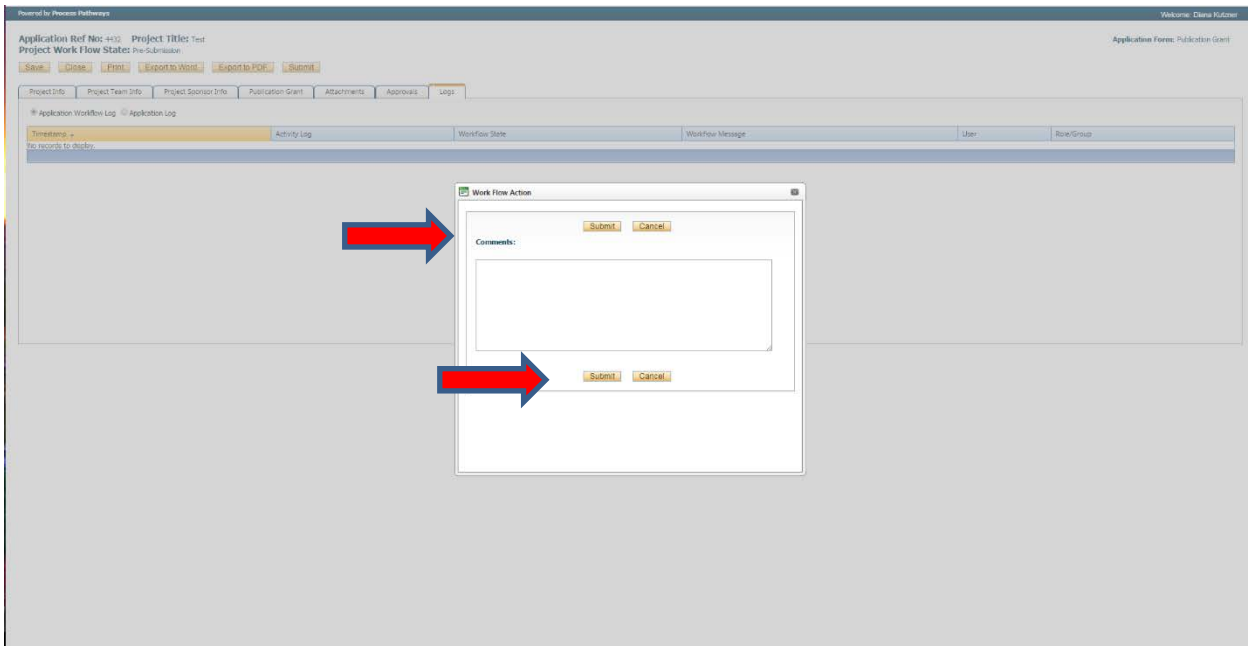
17. **“Errors”** tab. This section will show you where there are errors in your application form. All errors must be corrected before you will be able to submit your application. Once all questions have been answered and errors are cleared, you will be able to “submit” your application.



18. **Final Processes.** “Save” the information entered in your application. You can also choose to “Print,” “Export to Word,” or “Export to PDF” your application.

19. **“Submit”:** Once you click “submit”, a Work Flow Action comment box will pop up. If you have any additional comments, enter them here. If you don’t, simply type “no comment” and click “submit” in this form as comments are required.

Your application will automatically be forwarded to the next signing authority. You will receive confirming emails each time the application is forwarded and approved through the work flow. If at any time further information is required, you will receive an email indicating such.



20. At any time, you can view the status of your application a) under an individual application’s “Log” tab or b) from the Home screen, under **“Applications: Under Review.”**

