Romeo

How to Review and Approve an Application (For Program Chairs & Deans)

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 250-960-5796 or email researchportal@unbc.ca

This approval process is only required for external grant applications or contracts.

Step 1: Researcher submits application

Once a researcher has submitted an application, which requires approval from the Department and/or Dean, the respective signing authority will receive a notification email similar to the one below. A copy of this notification will also be sent to the AA or EA. By default, the email will be sent from 'researchportal@unbc.ca'. A copy is also sent to this email address to notify the Office of Research (OR). Note that the Application has a reference number; this will be helpful should you have several applications come in for approval in a short period.

Example of email notifying the signing authority of a grant application or contract that requires approval.

From: researchportal@unbc.ca [mailto:researchportal@unbc.ca]
Sent: Tuesday, February 07, 2017 1:41 PM
To: Nicole Balliet
Cc: Research Portal
Subject: Grant for Review

February 07, 2017

Dear Signing Authority,

Application Reference No: 4504

External Grant Application Form titled 'Romeo test of approval process by OR has been submitted by Ms. Diana Kutzner and requires your review and decision.

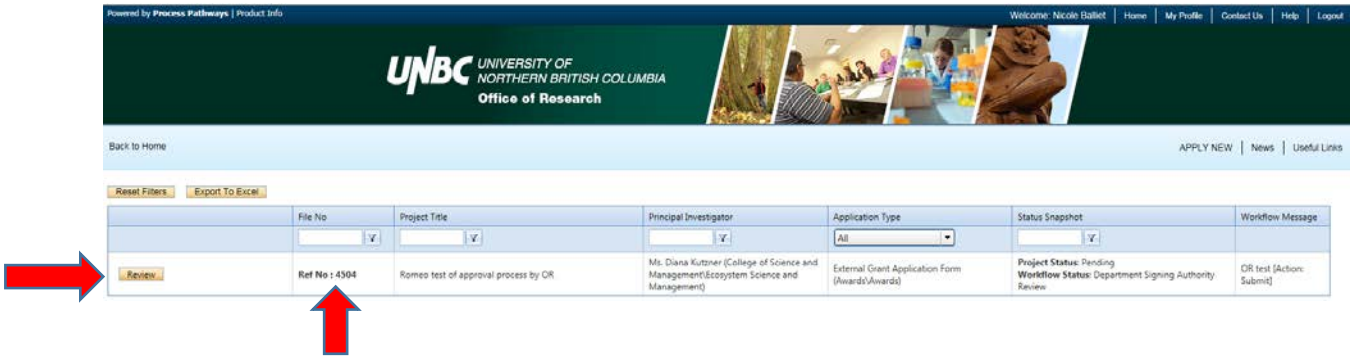
Please login to Romeo's "Researcher Portal" at https://unbc.researchservicesoffice.com/ to complete this task.

Once you have received the email, you can either click on the link provided in the email or go to the UNBC Romeo login page via the UNBC Research website. The link to the Researcher Portal is https://unbc.researchservicesoffice.com. 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 250-960-5796 or email researchportal@unbc.ca.

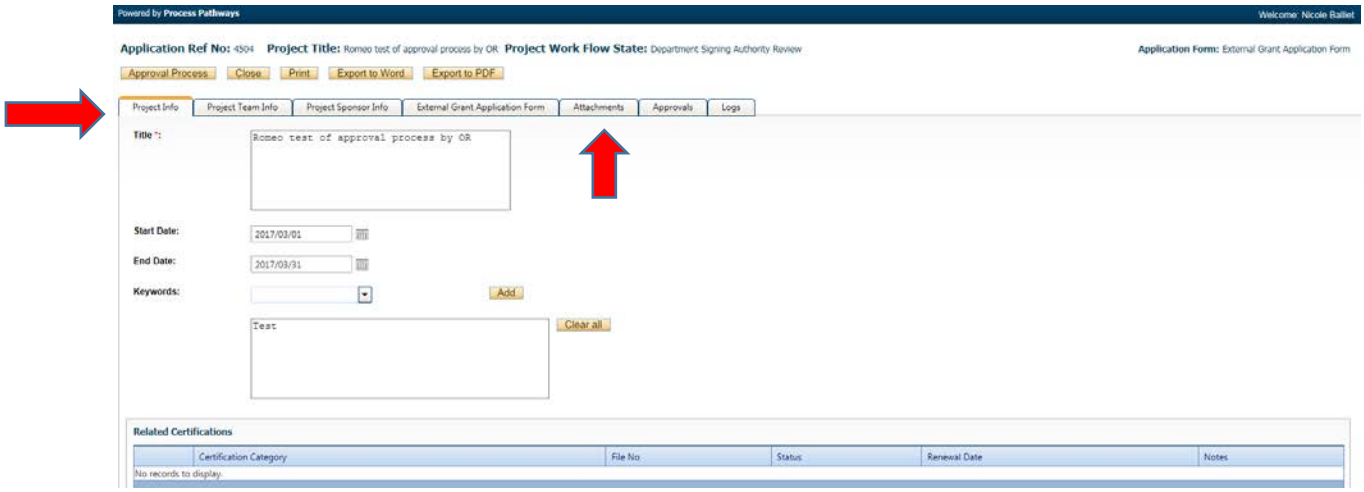
Step 2: Approval by signing authority

Once you login to Romeo, you will see a screen similar to the following one. The task/action needing your attention will be highlighted in red font. Click on “Applications: New” to proceed to the application needing approval.

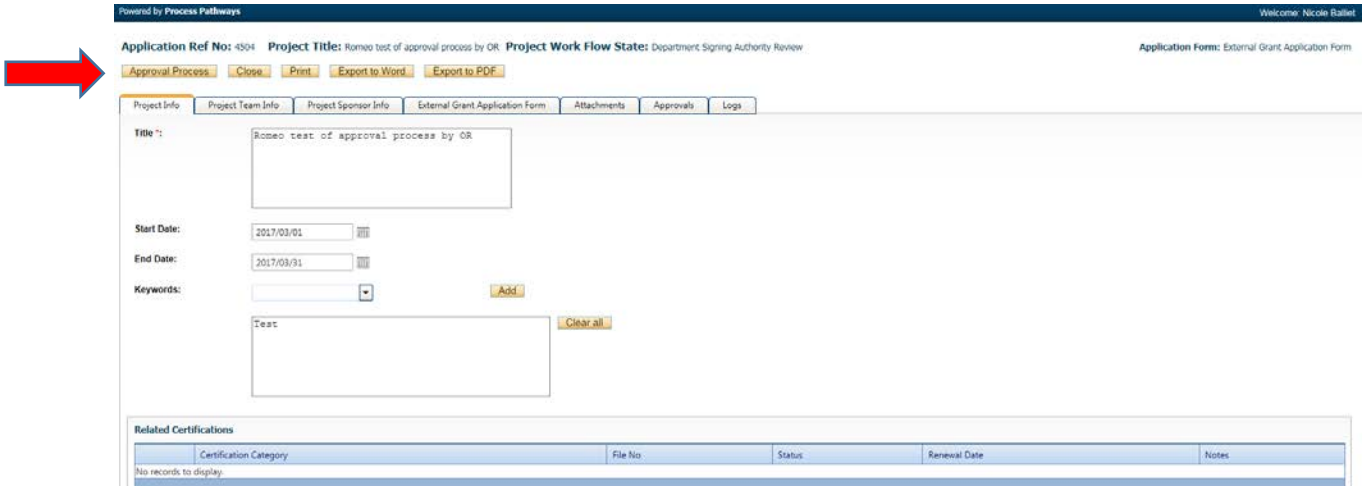
Any applications needing your approval will show in the next screen, as seen in the example below. Find the application you want to review by looking at the Reference Number and click on “Review” to proceed.



Proceed by reviewing the application by going through each tab. Note that you will be able to download any required documents or supplementary material under the “Attachments” tab.



Once you have completed your review, click on “Approval Process”.



A separate window will pop up, which gives you several options to proceed with the approval process (see below).

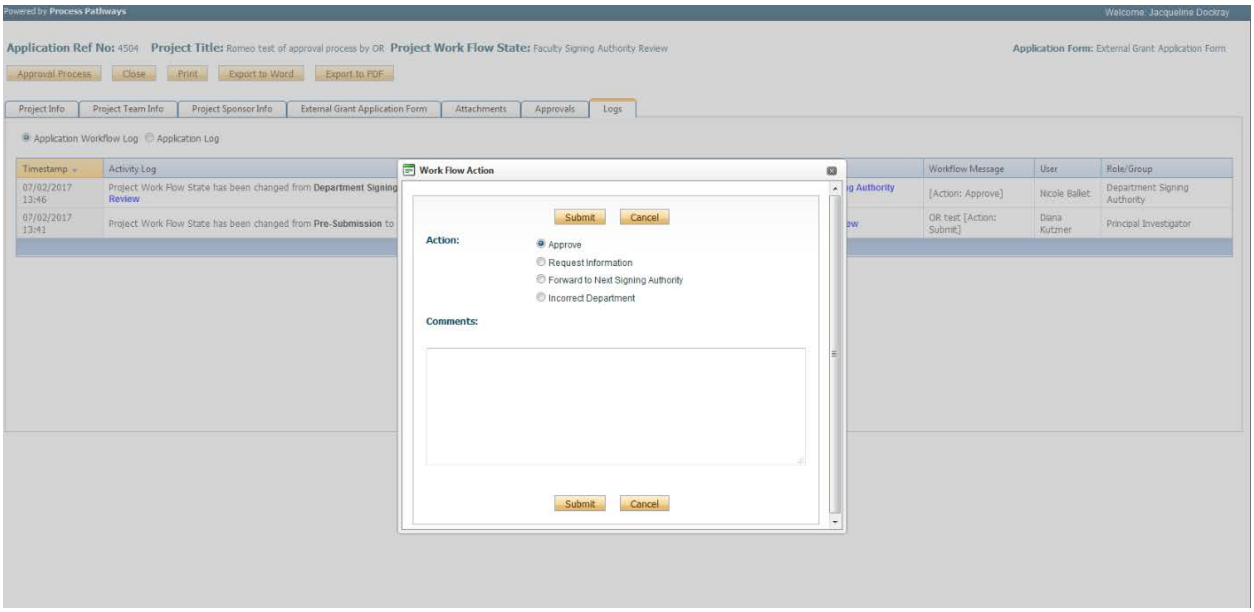
Approve: select to indicate your approval and progress the application through its prescribed workflowThe Researcher will receive a notification email accordingly.

Request Information: select if you require further information from the researcher. Elaborate on what you require in the comments box.

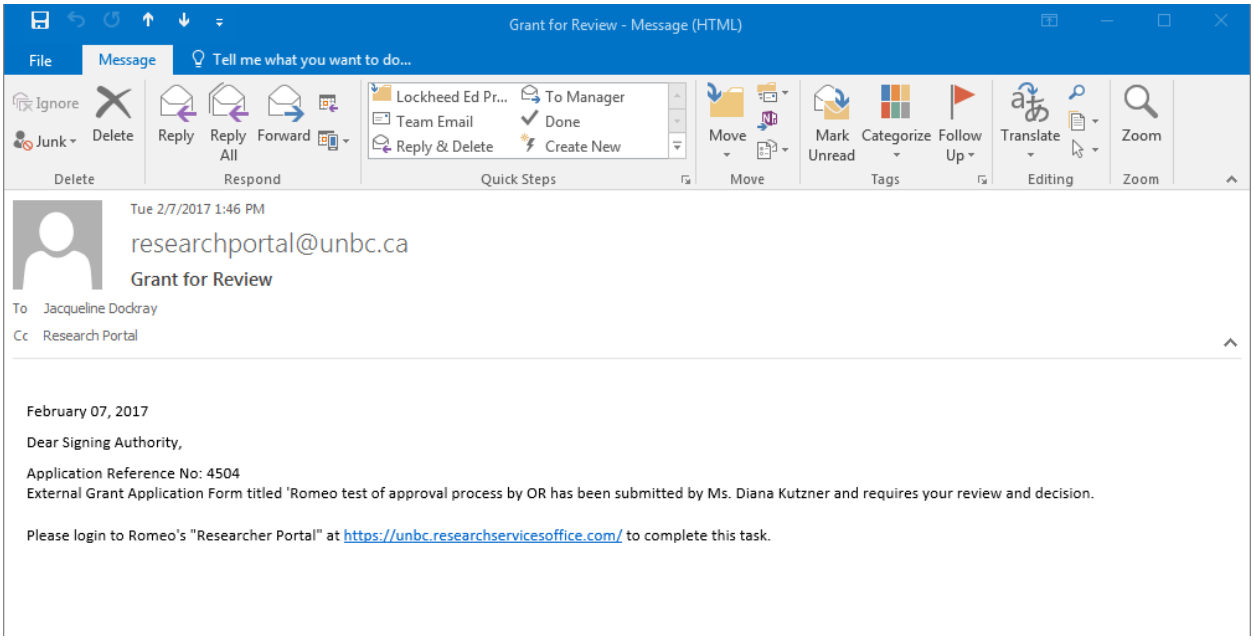
> Note: The application will be sent back to the researcher, who can edit the application and resubmit it accordingly. When the application is resubmitted, the signing authority which requested the information will be notified of the resubmission. When resubmitted, the application will skip any signing authority level that has approved the application when it was first submitted. For instance, if the OR requests further information and sends the application back to the researcher, the resubmission will skip all signing authorities that have already given approval.

Forward to Next signing authority: to progress the application to the next signing authority without your approval.

Incorrect Department: to return an application to the researcher that has been routed to you in error.



Once the signing authority has approved the application, the Researcher will receive an email notifying them that the application has been approved at this level. The next signing authority will receive an email similar to the one below to notify them that an application requires their approval.



The process for all signing authorities to review the application is the same as described above.