

# Romeo

## How to Apply for a Faculty Conference Travel Grant

Please note: Romeo is compatible with Internet Explorer, Firefox, Edge, Google Chrome and Safari. If you have any problems or questions, please contact the Office of Research at 250-960-5852 or email [researchportal@unbc.ca](mailto:researchportal@unbc.ca)

It is recommend that before applying for the Conference Travel Grant you read the current guidelines on our website. <https://www.unbc.ca/research/internal-funding-opportunities>

1. To access Romeo, paste the following link into your browser:

<https://unbc.researchservicesoffice.com/Romeo.Researcher/Login>. 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/romeo](http://www.unbc.ca/research/romeo)).

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](mailto:researchportal@unbc.ca). Please note: using the register button below allows a user to self-register, however we would like you not to use this option as UNBC faculty already have pre-created accounts so this will create a duplicate account.

 For access to the Research Portal, please contact a system administrator via [researchportal@unbc.ca](mailto:researchportal@unbc.ca) to create an account



Username

Password

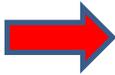
3. Once logged into Romeo, you will be brought to the Home page (see the example below).



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. Currently, only the Research Funding Category is active.

Under **Research Funding**, select the “**Conference Faculty Travel Grant**” to apply for the travel grant.

Animal Care		
Application Name	Description	Status
<a href="#">Animal Care In Principle Application</a>		Open
<a href="#">Animal Care New Application Form - Research Protocol (Field studies)</a>		Open
<a href="#">Animal Care New Application Form - Research Protocol (Laboratory Studies)</a>		Open
<a href="#">Animal Care New Application Form - Teaching Protocol</a>		Open
Biohazardous Materials		
Application Name	Description	Status
<a href="#">Biohazardous Material/Substance Use Application Form</a>	Researchers who are proposing to use biohazardous materials or notifiable biological substances must obtain a permit before purchasing these items or commencing laboratory work.	Open
<a href="#">Internal Radiosotope Permit Application</a>	Please use this form for new and renewal applications.	Open
Research Ethics		
Application Name	Description	Status
<a href="#">Research Ethics Board In Principle Review / Release of Funds</a>		Open
<a href="#">Research Ethics Board New Application Form</a>	Complete the New Application form when applying to the Research Ethics Board for conducting research involving human participants. Upcoming deadlines for above minimal risk applications requiring full board review are Feb. 25, 2016, March 17, 2016, April 14, 2016, May 5, 2016, and June 9, 2016. Minimal risk studies can be submitted at anytime, and an initial response from the REB usually takes approximately two weeks.	Open
Research Funding		
Application Name	Description	Status
<a href="#">Conference Faculty Travel Grant</a>	UNBC travel grants are available for national or international conference travel by eligible faculty members who are presenting a paper or poster. There are two rounds of competition per year. Retroactive applications are accepted but only under exceptional circumstances. Please consult the travel grant guidelines for more information on this competition.	Open
<a href="#">Contract Submission Form</a>	The Contract Submission Form must be completed by researchers submitting contract details for the development of a contract.	Open
<a href="#">External Grant Application Form</a>	The Grant Application Form must be completed by researchers applying for an external grant.	Open
<a href="#">General Research Fund (GRF) Application Form</a>		Open
<a href="#">Publication Grant</a>	UNBC publication grants are intended to enable UNBC faculty to disseminate the results of their scholarly endeavors. Please consult the competition guidelines for eligible expenses.	Open
<a href="#">Seed Grant</a>	Research seed grants are intended to act as a “springboard” to assist faculty in obtaining external funding for their research. Seed grants are distinct from start-up funding, which is made available to new faculty and negotiated with Chairs/Deans as a part of the appointment process. Deadline: March 1	Open



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

Powered by Process Pathways Welcome, Diana Kutzner

Application Ref No: 4466 Application Form: Conference Faculty Travel Grant

Save Close Print Export to Word Export to PDF Submit

Project Info | Project Team Info | Project Sponsor Info | **Conference Faculty Travel Grant** | Attachments | Approvals | Logs | Errors

Title:

Start Date:

End Date:

Keywords:

Related Certifications

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Certification Category	File No	Status	Renewal Date	Notes
No records to display.				

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

**Title:** title of the conference for which you are seeking travel support,

**Start date and end date:** enter the start date and end date of the conference.

**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 for submission but we would like all relevant fields to be completed.

7. **Related Certifications:** No certifications (e.g., REB application) are required for the travel grant so no action is required for this section.

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.

8. 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. 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.

9. Next, proceed to the “**Project Sponsor Info.**” tab. You will see a screen similar to the one below. Click “Add New.”

**Sponsor Info.**

Agency:  ←

Program:  ←

Investigator:

Competition Date:

Start Date:

End Date:

Currency Type:

Comments:

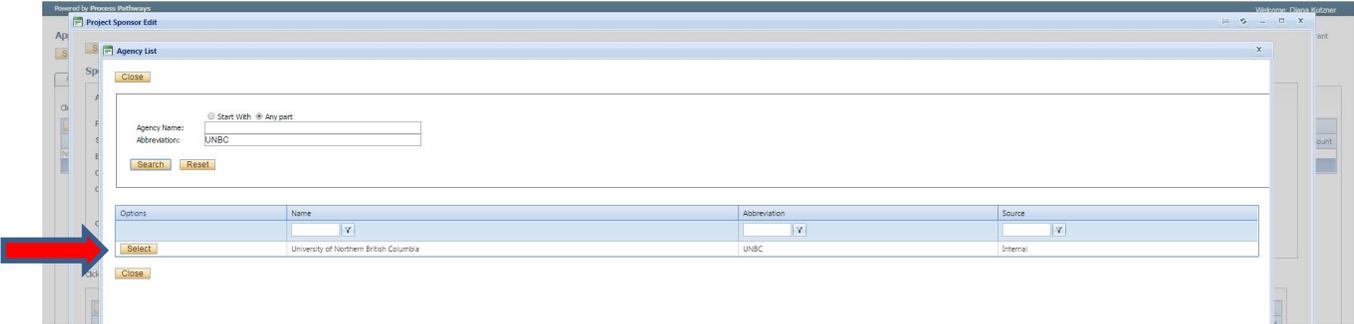
To generate disbursement table, enter Start and End Dates above and click GENERATE. To add or delete fiscal year rows after first generate, edit Start Date and End Date above, and click GENERATE to refresh the per fis

←

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead
No records to display.					

**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 (e.g. UNBC). For this internal grants application, conduct a search for UNBC using the “Abbreviation” field.

Click on “Select” to choose UNBC.



**Program:** Click on the drop-down list beside “Program” and select the program you are applying to (i.e., **Faculty Travel Grant**).

Enter the anticipated **Start Date** and **End Date** of your conference.

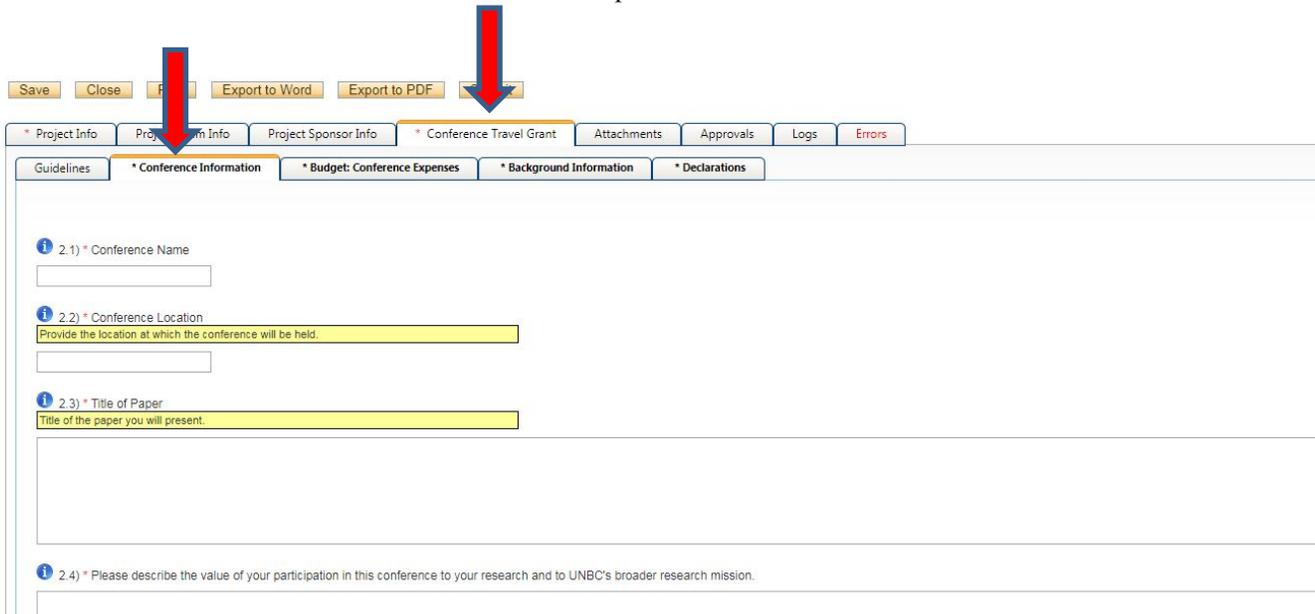
Enter the **grant application deadline**.

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. 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**.”

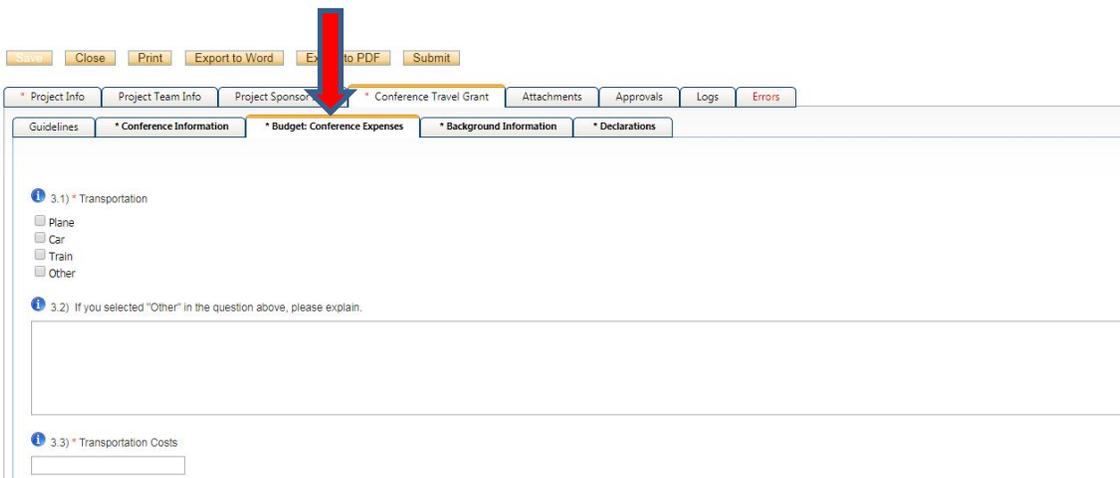
10. A new funding disbursement will need to be entered. Click the “Generate” button and a table with fiscal dates will be generated where you can then add the appropriate disbursement. Requested funds

should be entered in CAD. Other fields can be left blank. Remember to click “save” before closing this page. Click on “Save” again to save the entire Sponsor Info. page.

11. Next, proceed to the “**Conference Travel Grant**” tab. The “**Conference Information**” tab will open by default. Answer all of the applicable questions under this tab. Remember to click “save” before moving onto the next tab. Click on  for more information about a question.



12. Next click on the “**Budget: Conference Expenses**” tab. Answer all the applicable questions under this tab.



13. Next, click on the “**Background Information**” tab. Questions in this tab are related to the most recent conference for which you received support from the travel grant committee. Answer all of the applicable questions under this tab.

Save Close Print Export to Word Export to PDF Submit

\* Project Info Project Team Info Project Sponsor Info \* Conference Travel Grant Attachments Approvals Logs Errors

\* Conference Information \* Background Information \* Declarations

2.1) \* Previous Committee Support  
 Yes  
 No

2.2) Conference Name

2.3) Date

2.4) Amount

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

Save Close Print Export to Word Export to PDF Submit

\* Project Info Project Team Info Project Sponsor Info \* Conference Travel Grant Attachments Approvals Logs Errors

\* Conference Information \* Background Information \* Declarations

3.1) \* This application is made in compliance with the University's policies on research and, in the event that an award is made, I will use the funds in compliance with all relevant University policies.  
 I agree

3.2) \* I do not anticipate being reimbursed from any other sources for the expenses outlined in this application (other than those already identified), and I understand that if I am reimbursed from another source, the expenses cannot also be claimed against this grant.  
 I agree

3.3) \* The electronic submission of this application constitutes my signature on the application.  
 I agree

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

Save Close Print Export to Word Export to PDF Submit

\* Project Info Project Team Info Project Sponsor Info \* Conference Travel Grant Attachments Approvals Logs Errors

Attach one of the following with your application:

- Letter of acceptance; or
- Letter of invitation

Applications may be considered on the basis of abstracts alone, but no award shall be granted until a letter of acceptance or invitation is submitted.

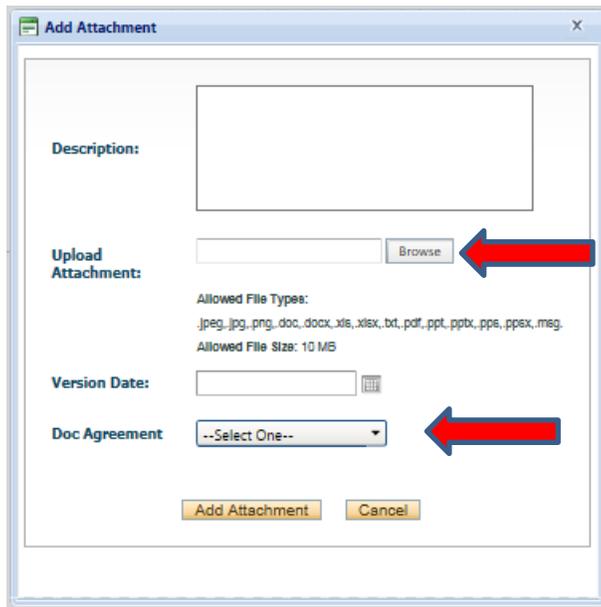
[Add Attachment](#)

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.

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

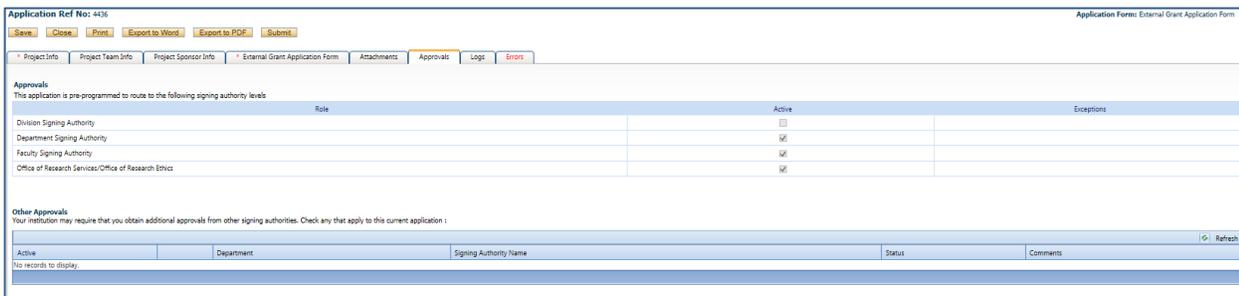
**A letter of acceptance or invitation is required** as part of your application. However, it can be added after the adjudication if you are unable to obtain one prior to the competition deadline.

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



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.

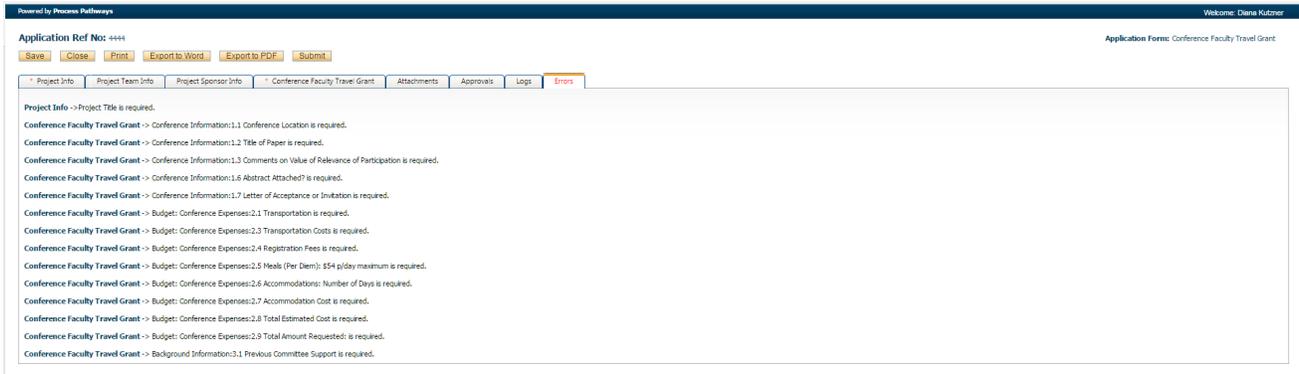
16. “Approval” tab. There is no information to be entered in this section. Applications are automatically routed to the next signing authority (as indicated).



17. “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.



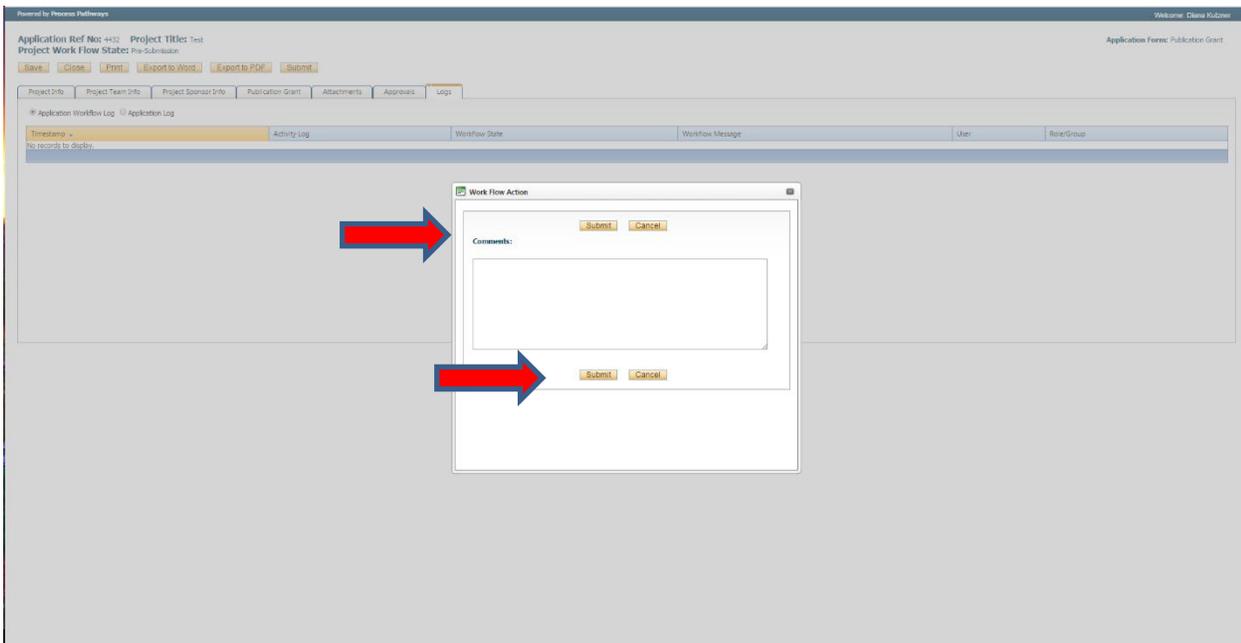
18. “Errors” tab. This section will show you where there are errors in your application form. All errors must be corrected before you will be able to submit your application. Once all questions have been answered and errors are cleared, you will be able to “submit” your application.



19. **Final Processes.** “Save” the information entered in your application. You can also choose to “Print,” “Export to Word,” or “Export to PDF” your application. Please note that attachments are not included in these documents.

20. **“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.



21. 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.”**

- Role: Principal Investigator
- Applications Draft
- Applications Requiring Attention
- Applications Under Review
- Applications Open Review
- Applications Withdrawn
- Events Draft
- Events Requiring Attention
- Reminders
- Role: Project Team Member

