

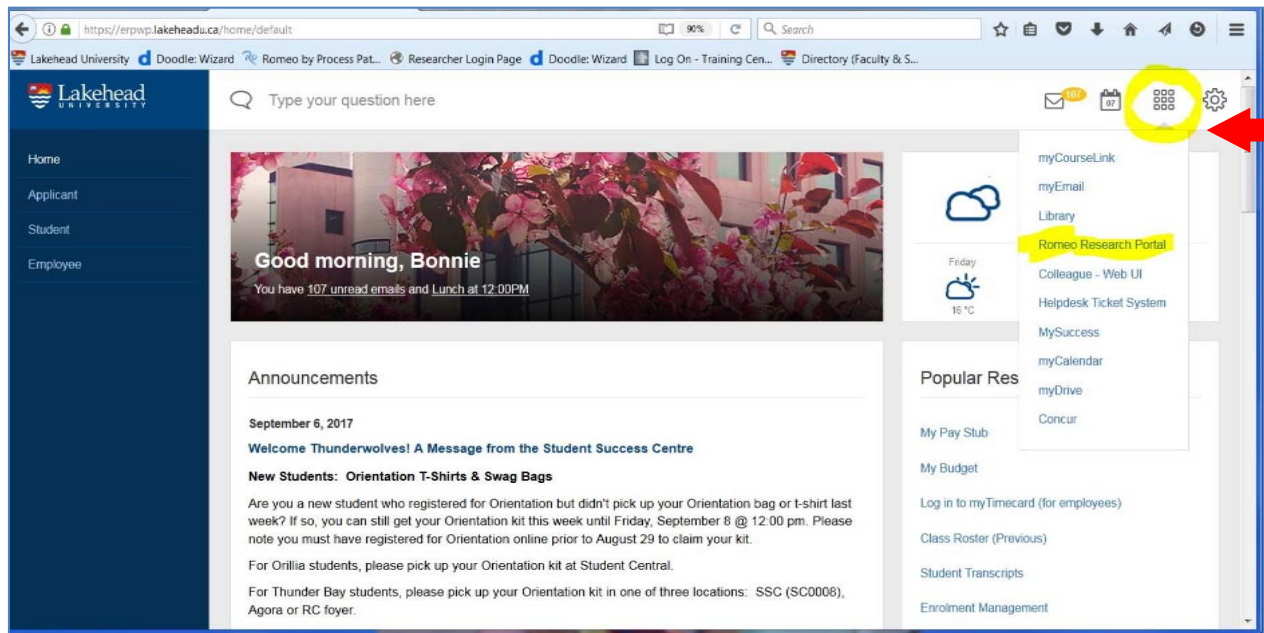
How to Apply for Internal Funding

(September 2017)

(Conference Travel, Publication Assistance, Research Development Fund, Visiting Scholar, VP REDI Strategic Fund, etc.) The process to apply for any award is the same.

Please note: Romeo does not have an automatic save feature. Users are encouraged to select the **SAVE** button after completing each tab, or more frequently, and before leaving the application for an extended period of time. If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or bknottlakeheadu.ca

1. Log into the Romeo Research Portal by first logging into myInfo using your usual username and password. Then select **Romeo Research Portal** from the web utilities icon (top right). This will bring you right into Romeo without needing another username and password.



2. Once logged into Romeo, you will be brought to the Home page, similar to the following:



3. To access application forms available in the Romeo Research Portal, click on **APPLY NEW**. You will be brought to a screen similar to the following, which lists all available online applications. There are applications under the four categories: Awards; Research Certification (ACC); Research Certification (Biosafety/Radiation); and Research Certification (REB).

4. Click on the **Application Name** of the award you want to apply for.

BACK TO HOME		APPLY
New Application Forms		
Awards		
Application Name	Description	Status
Regional Research Fund	To stimulate pilot research of an applied nature with particular relevance for Northwestern Ontario. Deadline Date: JUNE 12 by 4:30 pm. Open to faculty members in the Schools of Kinesiology, Nursing, Outdoor Recreation and Parks & Tourism and Faculties of Business Administration, Education, Engineering and Natural Resources Management.	Open
SRC: Conference Travel	Applicants must apply prior to the time of the conference unless the meeting is announced after the deadline. Deadline Dates: May 10 and October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Open Access Author Fund	Deadline Date: On-going. PLEASE NOTE: Romeo is compatible with Internet Explorer, Firefox and Google Chrome. Although most features work in Safari, Safari is NOT a recommended browser for Romeo at this time.	Open
SRC: Publication Assistance	Deadline Dates: May 10 & October 10 - by 11:59 pm (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Research Development Fund (RDF)	Deadline Dates: March 10 & October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Visiting Scholar	Deadline dates for submission: March 10 & October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
Vice-President (RI) Strategic Fund: Emergency Research Equipment Fund	To cope with unexpected emergency repairs for major equipment. No application deadline.	Open
Vice-President (RI) Strategic Fund: International Research Collaboration Grant	To facilitate the involvement of Lakehead researchers in international research networks and programs and to support the development of new and existing international collaborations within the well-established research priorities of Lakehead University's Strategic Research Plan.	Open
Vice-President (RI) Strategic Research BRIDGE Fund	To encourage and support those faculty members seeking to restart their research activities following a full-time administrative appointment or a lengthy absence. Deadline Date: November 1.	Open

5. You will be brought to a similar screen:

Powered by **Process Pathways** Welcome: Anne Klymenko

Application Ref No: 1054 **Application Form:** SRC: NSERC Conference Travel (Form D)

Project 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.

Trusted sites 100%

6. On the first tab, the **Project Info** tab, enter the **Project Title** (publication name, conference name, etc.), your anticipated **Start Date**, and **End Date**, and any appropriate **Keywords** (if applicable).

7. Fields marked with a red asterisk (*) are mandatory.
8. Remember to select **Save** at the top.
9. Proceed to the 2nd tab, **Project Team Info**. Your screen will look similar to the following. The Principal Investigator Info section will auto-populate with your profile information. For system security and data integrity purposes, your email address and affiliation can only be edited or updated by the Romeo Administrator. Contact the Administrator if your profile information is incorrect or out-of-date. *Affiliation*, will determine which department your application is forwarded to for online approval (workflow).
10. If you are associated with multiple departments, select the blue arrow across from **Affiliation**. Each department should be listed. Select the appropriate department for which you want THIS application forwarded to for approval (your department chair). If the appropriate department is not listed, contact the Romeo Administrator at bknott@lakeheadu.ca

Application Ref: 1032 Application Form: SRC: NSERC: Conference Travel

Save Close Print Export to Word Submit

* Project Info. **Project Team Info.** Project Sponsor Info. * SRC: NSERC: Conference Travel Attachments Logs Errors

Principal Investigator Info.

Retrieve Info

Prefix: Mrs. Last Name: Klymenko First Name: Anne

Affiliation*: VP Research/Research

Rank: STAFF Gender: Female Institution: Lakehead University

Phone 1: 807-343-8223 Phone 2:

Email*: aklymenk@lakeheadu.ca Fax:

Primary Address: Alternate Address:

Preferred Address: Primary Address Alternate Address Country: Canada

Comments:

Other Project Member Info:

Add New

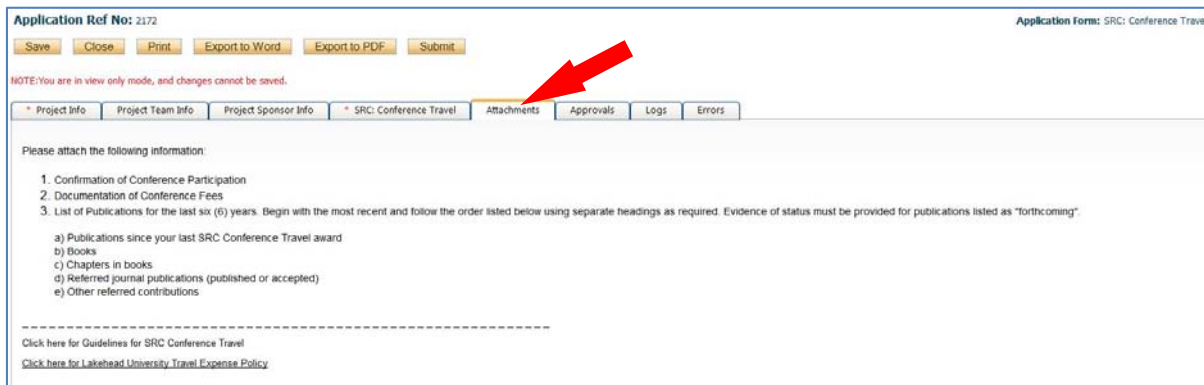
Last Name	First Name	Role In Project
No records to display.		
Ready		

11. The 3rd tab is the **Project Sponsor Info** tab. This tab will be filled out by the Administrator, proceed to the next tab.

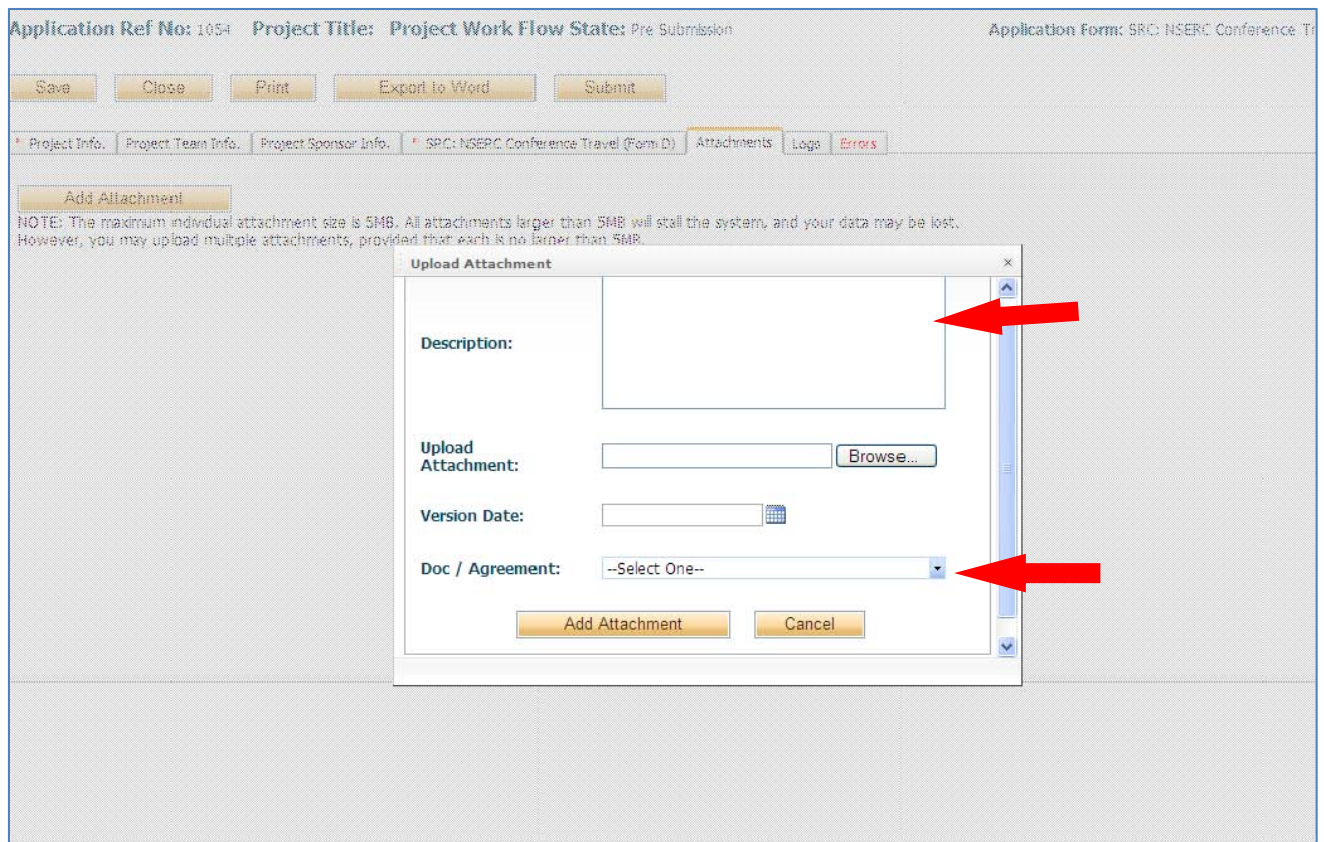
12. The 4th tab – will be labelled the name of the fund you are applying to (ie. SRC Conference Travel). Click on this tab to open an additional set of tabs (such as General Information, Publication Information, Financial Details, Required Attachments, etc.). The titles will be different for each application, but the process is the same. See example below.
13. Enter all the requested information on all the applicable tabs. Remember **fields marked with a red asterisk (*) are mandatory**.



14. The 5th tab, **Attachments**, is where you can upload any required attachments to the application (such as confirmation documentation, current CV, publications, invoices, etc.)

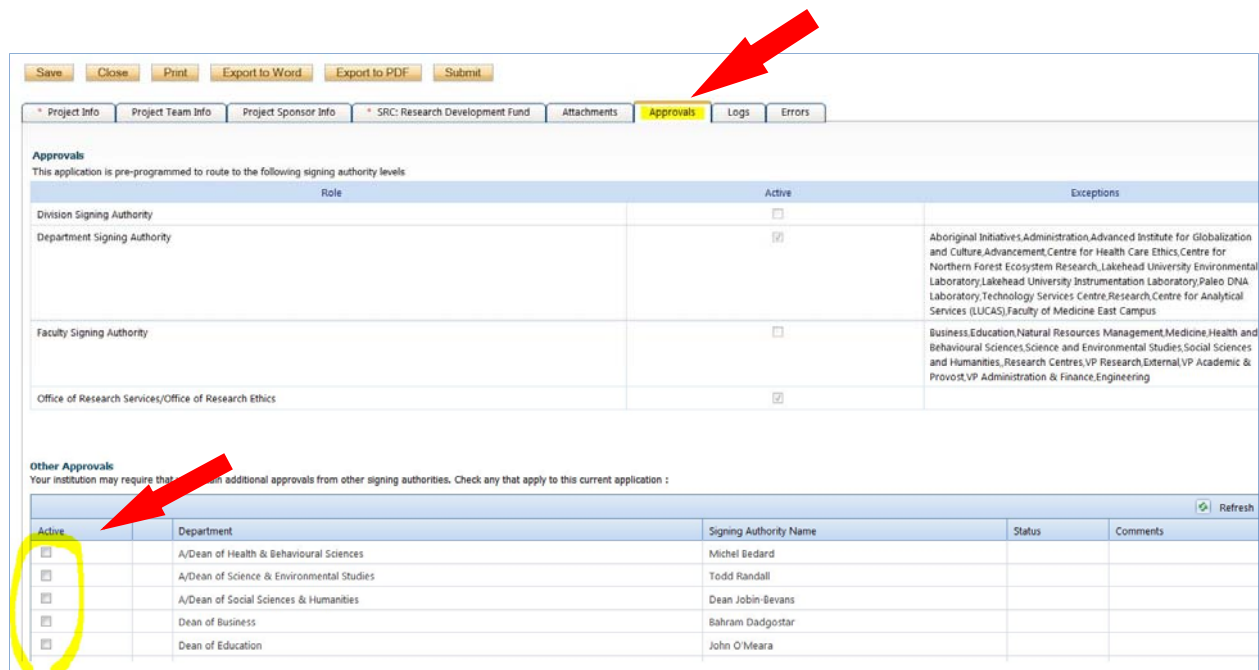


15. Click on the **Add Attachment** button. You have the option of choosing a description from the drop down list for your attachment; however this is optional.



16. The 6th tab, Approvals, is for Chairs Only. If you are a Chair, you will require your Dean's approval. If the PI is not a Chair, ignore this tab and proceed to item #18.

17. Under **Other Approvals**, select an alternate to approve your application (your Dean). If the appropriate person is not listed, contact bknott@lakeheadu.ca



18. If all mandatory fields are NOT filled in, there will be a final tab called **Errors**. Click on the **Errors** tab to see a listing of any mandatory field requiring a response. An application cannot be submitted until all mandatory fields are filled in. When all mandatory fields have a response, the **Errors** tab will disappear.

The screenshot shows the application form interface for 'SRC: Conference Travel'. At the top, there is a header with 'Application Ref No: 2172' and 'Application Form: SRC: Conference Travel'. Below the header is a navigation bar with buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The 'Submit' button is highlighted with a red arrow. Below the navigation bar is a tabbed interface with tabs for 'Project Info', 'Project Team Info', 'Project Sponsor Info', '* SRC: Conference Travel', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Errors' tab is selected and highlighted with a red arrow. The content of the 'Errors' tab lists several mandatory fields that require attention:

- Project Info -> Project Title is required.
- SRC: Conference Travel -> General Information:1.1 Please indicate which project category you are applying to: is required.
- SRC: Conference Travel -> General Information:1.2 Have you applied for Tri-Council (SSHRC/NSERC/CBHR) or any other external funding in the past four years? is required.
- SRC: Conference Travel -> General Information:1.4 Are you applying to SSHRC/NSERC/CBHR or any other external funding this year (May 1 to April 30)? is required.
- SRC: Conference Travel -> General Information:1.6 Have you received Senate Research Committee Conference Travel Funds in the present fiscal year (May 1 to April 30)? is required.
- SRC: Conference Travel -> General Information:1.9 Have you received other sources of funding to attend this conference? is required.

19. At any time during the application process, you can **Save, Print, Close, Export to Word** and **Export to PDF**, but an application can only be submitted when the **Errors** tab disappears.

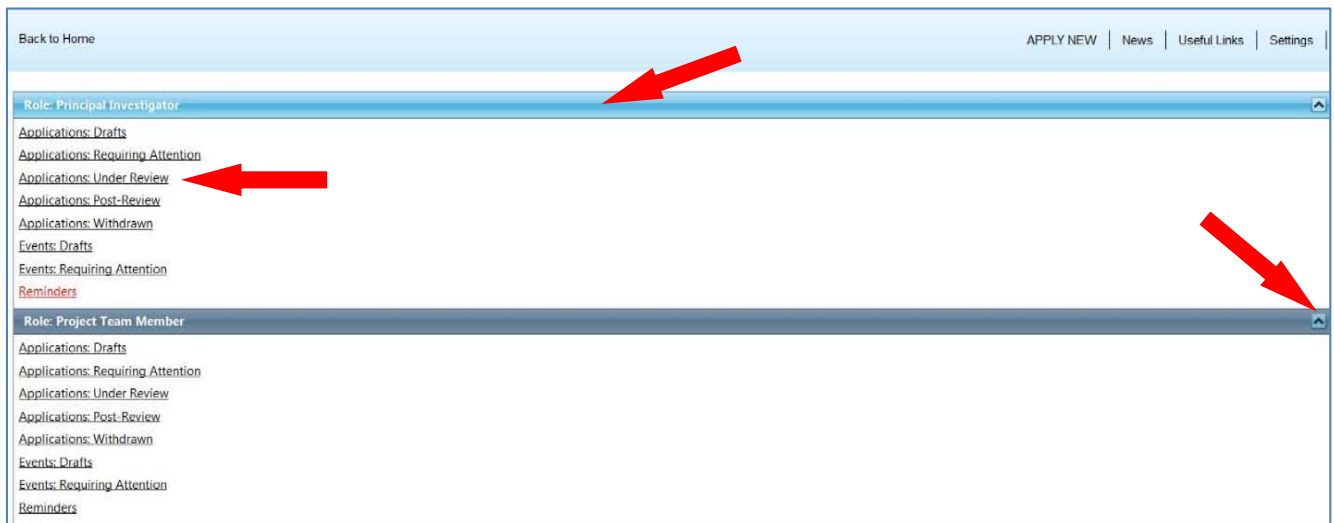
20. Select **Submit** to send the application through the on-line approval process (work flow). The application will automatically be forwarded to your Chair/Director for approval. Once approved by the Chair/Director, it will automatically be forwarded to the Office of Research Services. You will receive confirming emails each time the application is forwarded and approved through the work flow. At any time, if further clarification is required, you will receive an email indicating so.

21. Once you select **Submit** (highlighted above) you will see the following screen. Include a message to the Chair/Director (sample below).

The screenshot shows a submission confirmation screen. At the top, there are two buttons: 'Submit' and 'Cancel'. Below these buttons is a section titled 'Comments:'. Inside this section, there is a text input field containing the text 'Please review & approve.' with a red arrow pointing to it. At the bottom of the screen, there are two more buttons: 'Submit' and 'Cancel'.

22. Comments entered above are displayed with the application, and are housed under the **Logs** tab (**Application Workflow Log**). The **Logs** tab tracks all data entry and workflow activities.

23. To expand or condense the drop down menu, either click on the blue banner or the arrow on the right.



24. At any time you can view the status of your application under **Applications: Under Review**. Select **View** to enter the application. The example below displays the Log tab.

If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or bknott@lakeheadu.ca

