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 <u>bknott@lakeheadu.ca</u>

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).

BACK TO HOME		APPL
New Application Forms		
Awards		
Application Name	Description	Status
Regional Research Fund	To stimulate plot research of an appled nature with particular relevance for Northwestern Ontario. Deadline Date: JUNE 12 by 4:30 pm. Open to faculty members in the Schools of Knesiology, Nursing, Outdoor Recreation and Parks & Tourism and Facultes of Business Administration, Education, Engineering and Natural Recources Management.	Open
SRC: Conference Travel	Applicants must apply prior to the time of the conference unless the meeting is announced after the deadine. Deadine 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	Deadine Dates: May 10 & October 10 - by 11:59 pm (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Research Development Fund (RDF)	Deadine Dates: March 10 & October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Visting Scholar	Deadine 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 ful-time administrative appointment or a lengthy absence. Deadline Date: November 1.	Open

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

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)
Save Close Print Export to Word Submit	
* Project Info. Project Team Info. Project Sponsor Info. * SRC: NSERC Conference Travel (Form D) Attachments Logs Errors	
Project Title*:	
Start Date:	
Keywords:	
Clear All	
Related Certifications • Click 'Search' to attach an existing certification. • Click 'Add New' to attach a certification not vet 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** a 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 <u>bknott@lakeheadu.ca</u>

oplication R	af 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	1	Application Form: SRC: NSERC Conference Travel
Save	Close Print Export to Word	Submit	
Project Info. Pr	rojed: Team Info, Project Sponsor Info, * SRC: NSERC C	Conference Travel Attach	nents Logs Errors
Principal Inv	vestigator 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:	
Ernail*:	aklymenk@lakeheadu.ca	Fax:	
Primary Address:		Alternate Address:	
Preferred Address:	Primary Address Alternate Address	Country:	Canada
Comments:			
Other Project	Member Info:	First Memo	
No records to o	Last Name	FIRSUNAME	KOIE IN PROJECT
NO TECOLOS CO C	aspray.		

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**.

Save Close Print Export to Word Ex	port to PDF Submit	Application Form: SRC: Conference Trave
DTE:You are in view only mode, and changes rate of be saved.		
* Project Info Project Te Project Sponsor Info	* SRC: Conference Travel Attachments Approvals Logs Errors	
* General Information * Conference Details * Financial I	Details Attachments Checklist	
Guidelines & Procedures are available on the At	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research.	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst 0 1.5) * Please indicate which project category you are applying t	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research. 10	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst 0 1.1)* Please indicate which project category you are applying t NEERC/CMR: Natural sciences and engineering: bio-medica/dif	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research. to: nical research and/or environmental influences on health	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst I 1.51 ° Flease indicate which project category you are applying t HSERC/CBR: Natural sciences and engineering; bio-medical/dir SSIRC/CBR: scoal sciences and humanites; health systems as	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research. to: nical research and/or environmental influences on health d services, health populations, and/or societal and cultural dimensions of health	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst 1,1) * Please indicate which project category you are applying t HISERC/CMR: Natural sciences and engineering; bio-medical/dir SSIRC/CMR: scool sciences and humanites; theath systems at CO 1,2) * Have you applied for Th Council (SSIRC/NSERCICHR) of	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research. to: nical research and/or environmental influences on health di services, health populations, and/or societal and cultural dimensions of health or any other external funding in the past four years?	ven to faculty members actively applying for
Guidelines & Procedures are available on the At Tri-Council funding and to faculty who demonst 1.1) ¹ Please indicate which project category you are applying 1 INSERC/CHR: Natural sciences and engineering; bio-medica/dif SSIRC/CHR: social sciences and humanities; heath systems an 1.2) ⁺ Have you applied for Tri-Council (SSHRC/NSERCICHR) of 9 Yes	ttachments tab. Fields marked with a red asterisk (*) are mandatory. Priority will be gi trate an active program of research. to: incal research and/or environmental influences on health of services, health populations, and/or societal and cultural dimensions of health or any other external funding in the past four years?	ven to faculty members actively applying for

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.)

Application Ref No: 2172	Application Form: SRC: Conference Travel
Save Close Print Export to Word Export to PDF Submit	
NOTE: You are in view only mode, and changes cannot be saved.	
* Project Info Project Team Info Project Sponsor Info * SRC: Conference Travel Attachments Approvals Logs Errors	
Please attach the following information:	
1. Confirmation of Conference Participation	
2. Documentation of Conference Fees	
3. List of Publications for the last six (6) years. Begin with the most recent and follow the order listed below using separate headings as required. Evidence of status mu	t be provided for publications listed as "forthcoming".
a) Publications since your last SRC Conference Travel award	
b) Books	
c) Chapters in books	
d) Referred journal publications (published or accepted)	
e) Uner reierrea contributions	
Click here for Guidelines for SRC Conference Travel	
Click here for Lakehead University Travel Exnence Policy	

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.

Save Close Print Export to Word Submit * Project Info. Project Sponsor Info. * SPC: NSEPC Conference Travel (Form D) Attachments Loga Errors Add Allachment NOTE: The maximum individual attachment size is SMB. All attachments larger than SMB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than SMB. Upload Attachment ×	ition Ref No: 1054 Project Title: P	oject Work Flow State: Pre Submission	Application Form: SRC: NSERC Conference
Project Info. Project Team Info. Project Sponsor Info. * SPC: NSERC Conference Travel (Form D) Attachments Logs Errors Add Allachment NOTE: The maximum individual attachment size is SMB. All attachments larger than SMB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than SMB. Upload Attachment X	Close Print Ex	ort to Word Submit	
Add Allachmeni NOTE: The maximum individual attachment size is SMB. All attachments larger than SMB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than SMB. Upload Attachment ×	Info. Project Team Info. Project Sponsor Info.	SPC: NSEPC Conference Travel (Form D) Attachments Loga Error	5
Upload Attachment ×	dd Allachmeni The maximum ndvidual attachment size is SM6.	II attachments larger than SMB will stall the system, and your data	may be lost.
	1. The second share a second second second black	Upload Attachment	×
Description:		Description:	
Upload Attachment: Browse		Upload Attachment:	owse
Doc / Agreement:Select One		Doc / Agreement:Select One	
Add Attachment Cancel		Add Attachment Cancel	v

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

Deniest Info	Designt Team Info	SBC: Berearch Development Sund	Attachments	Anneount	Leas	Errorr			
Project into	Project learn into Project Sponsor into	* SKC: Kesearch Development Fund	Attachments	Approvais	Logs	Errors			
pprovals									
his application is pr	re-programmed to route to the following signing au	thority levels				Arthur		D	cantions
Division Cineten Av	Hole					Active		E.	ceptions
Wision signing Au	unority								
Department Signing Authority				Aboriginal Initiative, administratio and Culture, advancement, Centre Northern Forest Ecosystem Reso Laboratory, Technology Service 5 Services (JUCAG) Faculty of Medic			ion, Advanced installer for Globalizatio for Health Care Ethics, Centre for Iarch, Lakehead University Environmen Instrumentation Laboratory, Paleo DN Centre, Research, Centre for Analytical icine East Campus		
aculty Signing Aut	hority					0	Business,Educat Behavioural Scie and Humanities, Provost,VP Adm	ion,Natural Reso nces,Science and Research Centre inistration & Fina	rces Management, Medicine, Healt Environmental Studies, Social Scie s, VP Research, External, VP Academ nce, Engineering
and the second second	Services/Office of Research Ethics					7			
Office of Research									
office of Research ther Approvals our institution may n	require that the second additional approvals from of	her signing authorities. Check any that app	ly to this current app	ication :					Ø Re
ther Approvals ur institution may to active	require that the second additional approvals from ot	her signing authorities. Check any that app	ly to this current app	ication :	Signing Aut	iority Name		Status	Comments
ther Approvals ur institution may t	require that the second additional approvals from ot Department A/Dean of Health & Behavioural Scien	her signing authorities. Check any that app	ly to this current app	ication :	Signing Aut	iority Name		Status	Comments
ther Approvals ur institution may institution the format of the format oo the format o	Pequire that require in additional approvals from of Department A/Dean of Health & Behavioural Scien A/Dean of Science & Environmental St	her signing authorities. Check any that app ces udies	ly to this current app	ication :	Signing Auth Michel Beda Todd Randz	nority Name rd		Status	Comments
ther Approvals ur institution may institution may institution may institution may institution may institution institutin institution insti	Prequire that a constraint of the second sec	her signing authorities. Check any that app ces udies	ly to this current app	lication :	Signing Auth Michel Beda Todd Randa Dean Jobin-	nority Name rd II Devans		Status	Comments
ther Approvals ur institution may institution may institution institution in the second secon	Pequire that the second approvals from ot Department A/Dean of Health & Behavioural Scient A/Dean of Science & Environmental St A/Dean of Social Sciences & Humanhi Dean of Business	her signing authorities. Check any that app ces uclies Es	ly to this current app	ication :	Signing Aut Vichel Beda Todd Randt Dean Jobin- Sahram Dac	nority Name rd II Bevans Igostar		Status	Comments

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.

Application Ro	ef No: 2172	Export to Word Exp	ort to PDF Submit							Application Form: SRC: Confere	nce Travel
Project Info Project Info ->Pr SRC: Conference	Project Team Info	Project Sponsor Info	* SRC: Conference Travel	Attachments	Approvals	Logs	Errors				
SRC: Conference SRC: Conference SRC: Conference	Travel -> General Infor	mation:1.2 Have you applied mation:1.4 Are you applying t	for Tri-Council (SSHRC/NSERC/C o SSHRC/NSERC/CBIR or any ot Senate Research Committee Cr	IHR) or any other e her external funding	external funding in g this year (May 1 unds in the preser	n the past fou 1 to April 30)? nt fiscal year (r years? is n is required. May 1 to Ap	equired. ril 30)? is require	d.	•	
SRC: Conference	Travel -> General Infor	mation:1.9 Have you received	other sources of funding to atte	nd 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).

	Submit	Cancel	
Comments:			
Please review & approve.			
	Submit	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.

Back to Home	APPLY NEW News Useful Links Settings
Role: Principal Investigator	
Applications: Drafts	
Applications: Requiring Attention	
Applications: Under Review	
Applications: Post-Review	
Applications: Withdrawn	
Events: Drafts	
Events: Requiring Attention	
Reminders	
Role: Project Team Member	A
Applications: Drafts	
Applications: Requiring Attention	
Applications: Under Review	
Applications: Post-Review	
Applications: Withdrawn	
Events: Drafts	
Events: Requiring Attention	
Reminders	

-

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

ave Save & Close	Approval Process Oxe oject Team Info. Project Sponsor Info. Document Tracking SRC: Research Developm	nent Fund (RDF) Milestones Events	Communications Log		
Application Log	Application Workflow Log				
Timestamp 👻	Log	Workflow State	Message	User	Role/Group
2014/07/15 10:22	Project Work Flow State has been changed from Approval Decision Made to ORS Review	Approval Decision Made -> ORS Review		bknott	Office of Research Services/Office of Research Ethio
2014/03/05 15:47	Project Status has been changed from Submitted to Active Project Work Flow State has been changed from ORS Review to Approval Decision Made	ORS Review -> Approval Decision Made		bknott	Office of Research Services/Office of Research Ethic
2014/01/29 10:31	Project Work Flow State has been changed from Pending Info by ORS to ORS Review Pour le chercheur Mrs. Anne Klymenko -> Le rôle dans le projet a été changé de " Primary Investigator " à " Co-Investigator " Le membre de l'équipe Bonnie Knott a été ajouté. Gon rôle est Primary Investigator" For Investigator Mrs. Anne Klymenko -> Role la Project has been changed from Primary Investigator " Project Membre Bonnie Knott has been Added, totie le Primary Investigator"	Pending Info by ORS -> ORS Review	testing re-submission after changing PI [Action: Re-Submit]	Bonnie Knott (su2)	Principal Investigator
2014/01/29 09:35	Project Work Flow State has been changed from ORS Review to Pending Info by ORS Program (SRC - NSERC Research Development Fund)/Agency(Lakehead University)/Grant Holder(Uftr. Anne Klymenko) has been Deleted	ORS Review -> Pending Info by ORS	Testing a file - no action required by you.	bknott	Office of Research Services/Office of Research Ethio
2013/10/09 13:30	New File Submitted By Researcher Project Work Flow State has been changed from Pre Submission to ORS Review	Pre-Submission -> ORS Review	Here is my RDF application for your consideration. [Action: Submit]	Anne Klymenko (su)	Principal Investigator