

# Work Flow Approval Process (Steps for Chairs/Directors/Deans)

(August 2016)

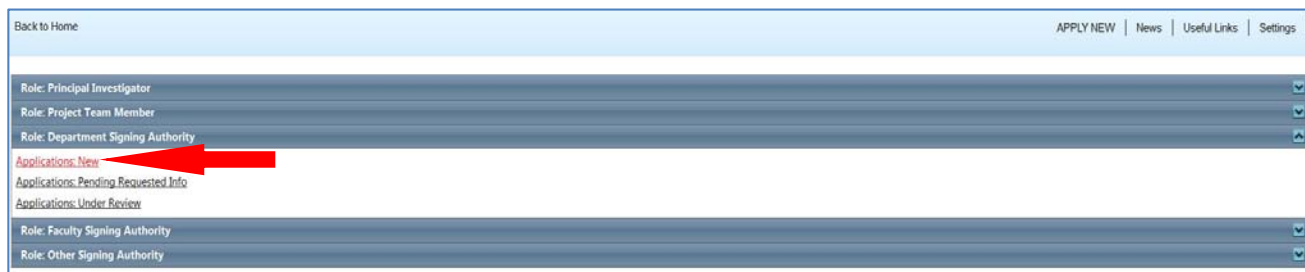
If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or [bknott@lakeheadu.ca](mailto:bknott@lakeheadu.ca)

The work flow approval process is the same whether the application is for a Certification (Human Ethics Research Ethics Board Researcher's Agreement Form) or an Award (ie. SRC funding application).

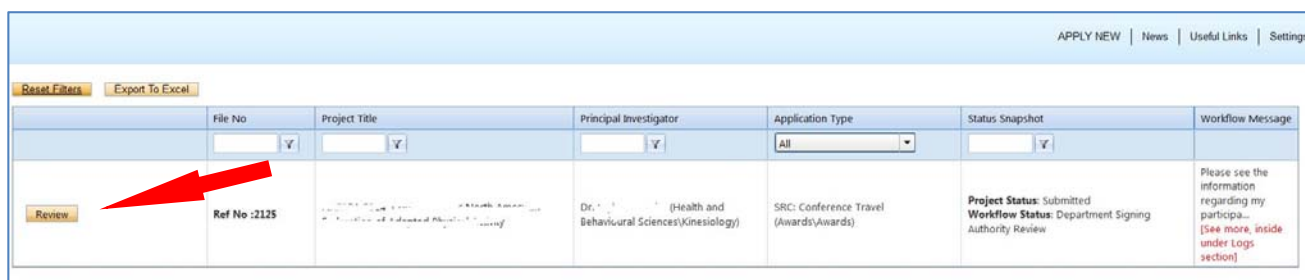
1. When you have a file to approve, you will receive an email from [research@lakeheadu.ca](mailto:research@lakeheadu.ca).
2. To log into the Romeo Research Portal, first log into myInfo using your usual username and password. Once logged in, select Romeo Research Portal on the left. This will bring you right into Romeo without needing another username/password.

The screenshot shows the Lakehead University website home page. At the top left is the Lakehead University logo. Below it is a navigation bar with tabs for 'Home', 'Applicant', 'Student', and 'Employee'. The main content area is divided into several sections. On the left, there is a sidebar with the following sections: 'IN YOUR EMAIL' (7 unread emails), 'IN YOUR CALENDAR TODAY' (12:00PM Lunch), 'Questions? Ask Us!' (a text input field and a 'Submit' button), 'FOR APPLICANTS' (myEmail, Helpdesk Ticket System), 'FOR STUDENTS' (myCourseLink, myEmail, Library, Romeo Research Portal, Helpdesk Ticket System), and 'FOR STAFF' (myCourseLink, myEmail, Romeo Research Portal, Colleague - Web UI, Helpdesk Ticket System). The 'Romeo Research Portal' link in both the 'FOR STUDENTS' and 'FOR STAFF' sections is highlighted in yellow. A red arrow points to the 'Romeo Research Portal' link in the 'FOR STAFF' section. In the center-right of the page, there is a box titled '2015-2016 Tuition & Compulsory Fee Rates' with text stating that the rates are available on the Accounts Receivable (Student Fees) Web Page and providing a link to the 'Schedule of Academic Fees 2015FW & Schedule of Miscellaneous Fees'. Below this box is a rating system showing an average of 2.4 (25 votes).

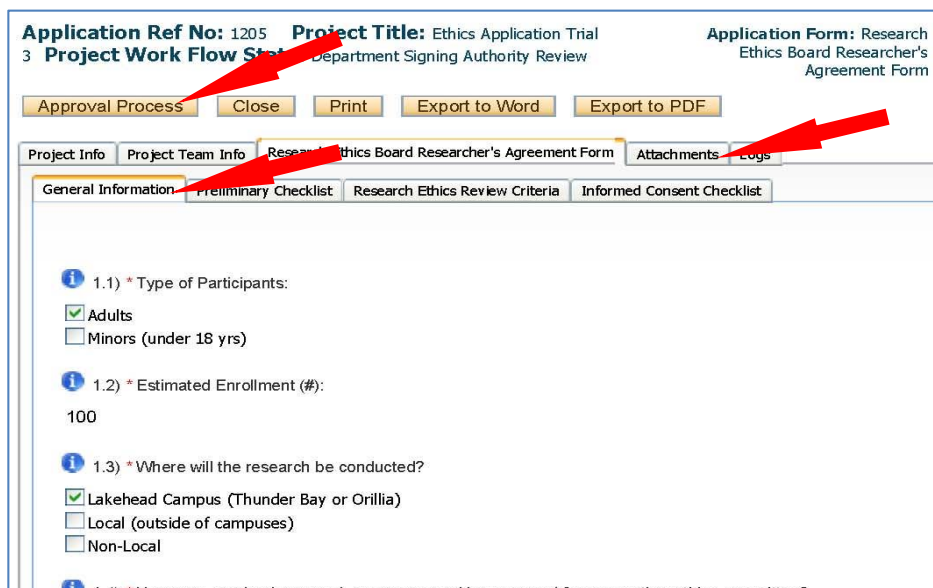
- The quick link **'Role: Department Signing Authority'** or **'Role: Faculty Signing Authority'** will direct you to all application forms where you have been assigned as a signing authority. When an action is required, the quick link will appear in **red**.



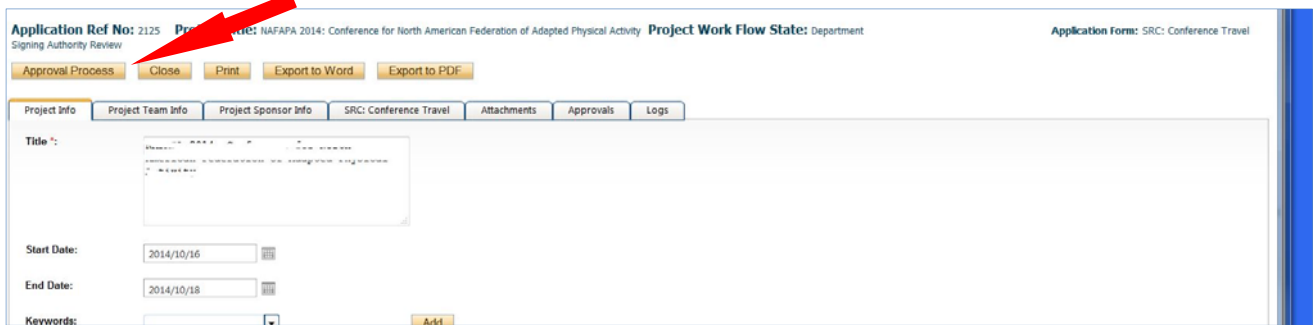
- Click on **'Applications: New'**.
- Select **'Review'** to enter the file and view the application.



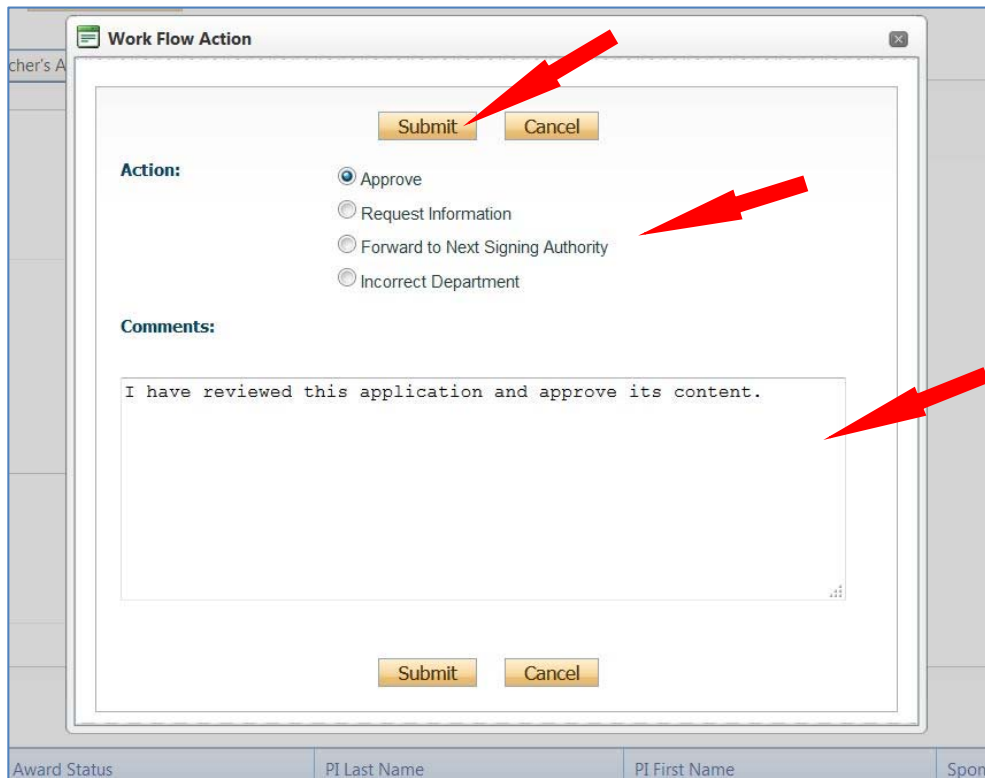
- Click on the various tabs to view all sections of the application. You can also export the application to Word or PDF format, which will allow you to view the entire application in one document. **Tip: Exporting to Word instead of PDF is a more eye appealing document.**
- Review each tab of the application (Project Info., Project Team Info., etc.)
- Click on the **'Attachments'** tab to view any attachments included with the application. Click on the File Name to open the attachment.



- When finished reviewing the application, click on the beige button **'Approval Process'**.



10. You will be brought to the Work Flow Action box.



11. Click '**Approve**' to grant your approval and forward to the next step of the approval process.

Click '**Request Information**' to return the application back to the Principal Investigator (PI).

Click '**Incorrect Department**' if this application has been incorrectly forwarded to you. This will return the application to the PI.

12. If returning the application to the PI, you will be required to include comments in the '**Comments**' box. This is where you would explain why the application is being returned.

The screenshot shows a web form interface. At the top, there are two buttons: 'Submit' and 'Cancel'. Below them is the 'Action:' section with four radio button options: 'Approve', 'Request Information' (which is selected), 'Forward to Next Signing Authority', and 'Incorrect Department'. Below the 'Action:' section is the 'Comments:' section, which contains the text 'Comments Required' in red. A large red arrow points from the right towards this text. At the bottom of the form, there are two more buttons: 'Submit' and 'Cancel'.

13. Select '**Submit**'. This will generate an email to the PI advising of your approval and that the application has been forwarded to the next step of the work flow.
14. If the application was returned to the PI, once the PI revises the application and re-submits, the application will be returned to you under '**Applications: New**' and the process is repeated. Start at Step 5 above.
15. If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or [bknott@lakeheadu.ca](mailto:bknott@lakeheadu.ca)