

Romeo

How to Apply for a Real Estate Foundation of BC Partnering Fund Grant

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 and Innovation at research@unbc.ca.

1. To access Romeo, go to <https://unbc.researchservicesoffice.com> and click on “Research Portal” (see below). You will also find a link to Romeo along with self-help and reference materials on the UNBC Office of Research and Innovation website (<https://www2.unbc.ca/office-research-and-innovation>). This link will take you directly to the login page (Step 2).



2. Login using your UNBC sign in (username@unbc.ca) and password. If you do not have a Romeo account, you will see a screen similar to that below. Click on the link for the “self-registration page” to create an account or contact the Office of Research and Innovation at research@unbc.ca.

Please note: if you are unsure if you have previously registered for an account, please contact the Office of Research and Innovation before registering, as duplicate accounts will need to be deleted.

Romeo Researcher Portal

Access Denied – You are not authorized to access the Romeo Researcher Portal.

If you already have an account on Romeo, please contact researchportal@unbc.ca.

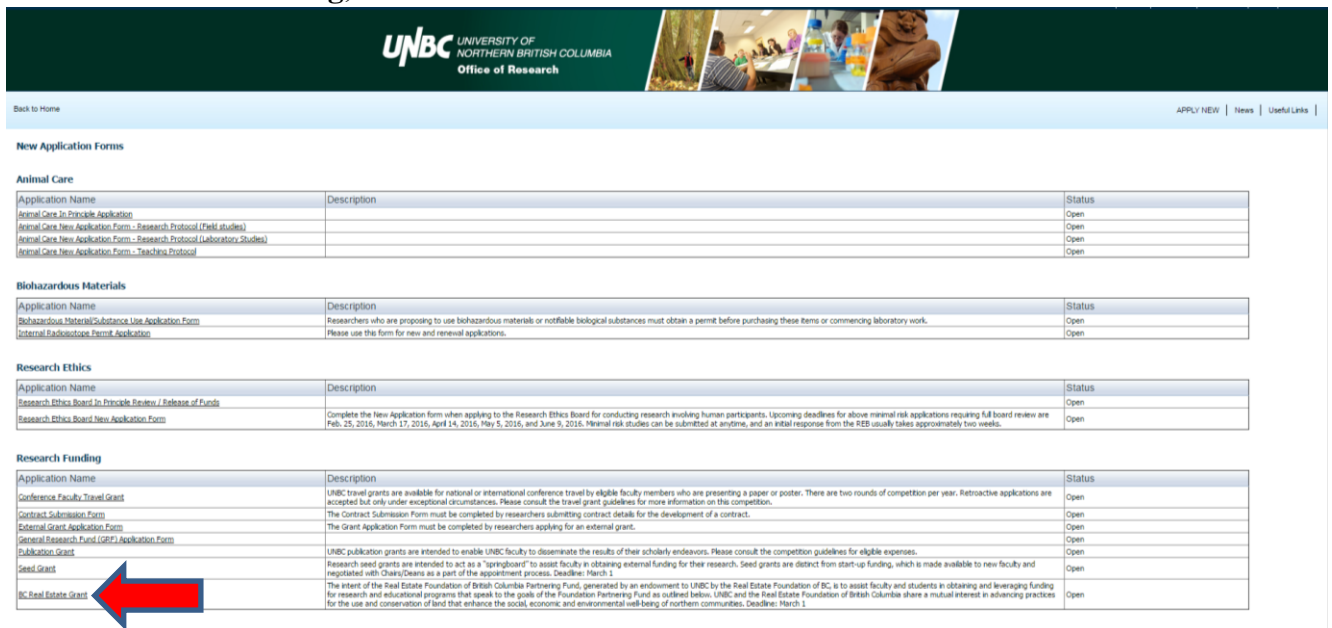
If you do not yet have an account on Romeo, please visit the [self-registration page](#) to complete your registration.

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.

Under **Research Funding**, select the “BC Real Estate Grant”.



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

Application Ref No: 4458

Application Form: BC Real Estate Grant

Save | Close | Print | Export to Word | Export to PDF | Submit

Project Info | Project Team Info | Project Sponsor Info | **BC Real Estate Grant** | Attachments | Approvals | Logs | Errors

Title:

Start Date:

End Date:

Keywords: Add

Related Certifications

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

Add New | Search

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

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

Title: title of the project.

Start date and **end date:** enter the proposed project start/end dates.

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.

7. **Related Certifications:** If you require any certifications for this project, click on “**Add New**”. A small “**Project Certification**” window will open. Select the certification you require from the drop down list and click “**Save**”. You can add multiple certifications, as needed.

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. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If the PI is not from UNBC and is not already entered into the Investigator Master Record (IMR), please contact the Office of Research, provide them with the PI’s contact information and have them add the individual to the IMR. **Please note:** if you remove yourself as PI, you will need to add yourself as a project team member, otherwise you will no longer be able to access the application.

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.

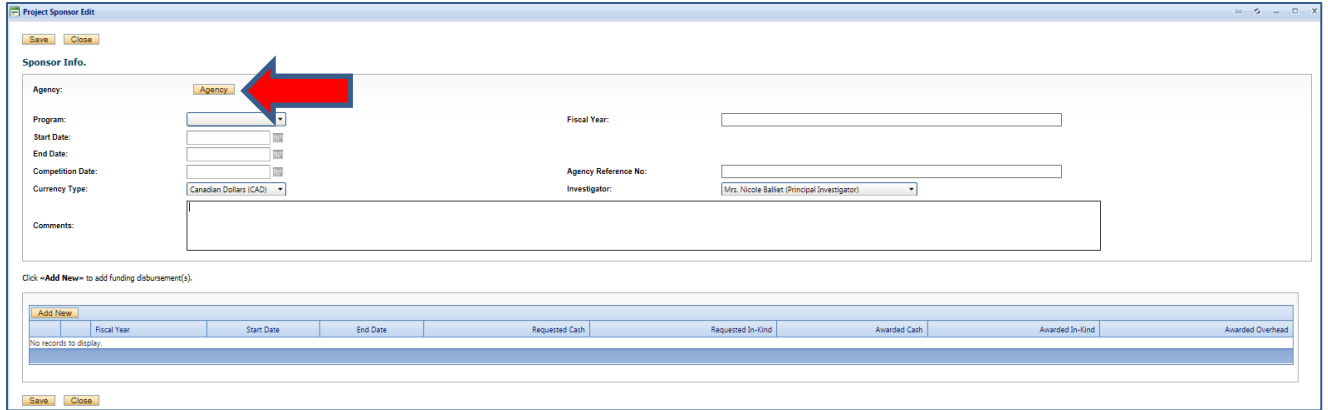
Click on “Save” to save the information entered on this page.

The screenshot shows the 'Principal Investigator' form for Application Ref No: 4436. The form includes fields for Name (Prefix: Mrs., Last Name: Ballet, First Name: Nicole), Affiliation (College of Arts, Social and Health Sciences/Anthropology), Rank, Gender (Female), Institution (University of Northern Br.), Phone, Email (nicole.ballet@unbc.ca), Primary Address (8888 Disraeli Way, Prince George, BC, V2R 4Z9), Phone2, Fax (250-960-5362), Alternate Address, Preferred Address (Primary selected), and Country (Canada). At the bottom, there is an 'Other Project Member Info' section with an 'Add New' button highlighted by a red arrow. The 'Save' button at the top left is also highlighted by a red arrow. The 'Project Team Info' tab is selected, and a red arrow points to it from the 'Project Info' tab.

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

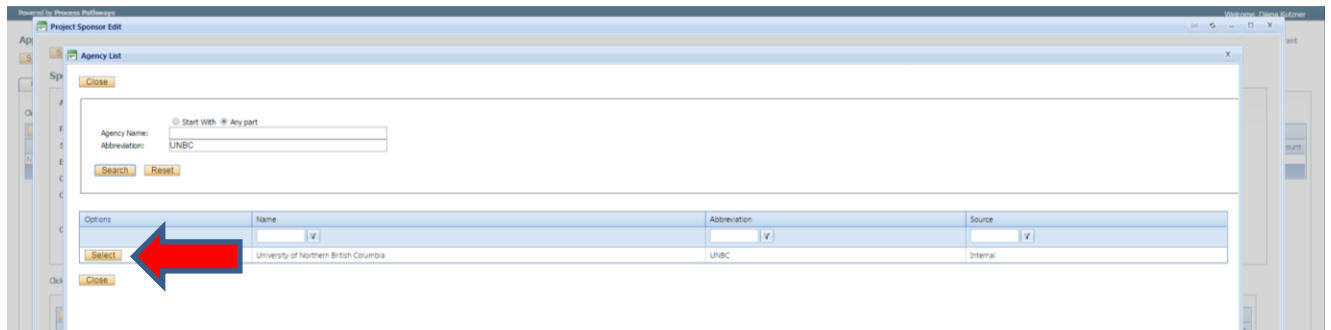
The screenshot shows the 'Project Sponsor Info' form for Application Ref No: 4436. The form includes a table with columns for Agency, Program, Currency, and Requested Amount. The 'Add New' button is highlighted by a red arrow.

If there are multiple sponsors/partner organizations for your project, you will need to repeat the process described below for each sponsor/partner organization.



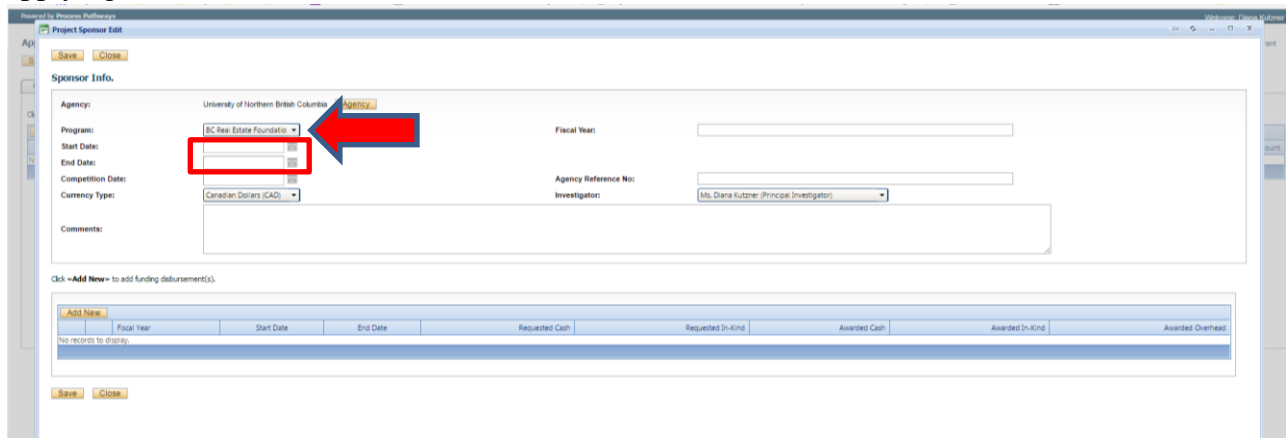
Agency: Click on “Agency” and search for the funding agency you are applying to. You may conduct a search using the “Agency Name” or “Abbreviation” fields (e.g. UNBC). For this internal grant application, conduct a search for **UNBC** using the “Abbreviation” field.

Click on “**Select**” to choose **UNBC**.



Once you’ve selected UNBC, you will see a screen similar to the one below.

Program: Click on the drop-down list beside “Program” and select the program you are applying to (i.e., **BC Real Estate Foundation**).

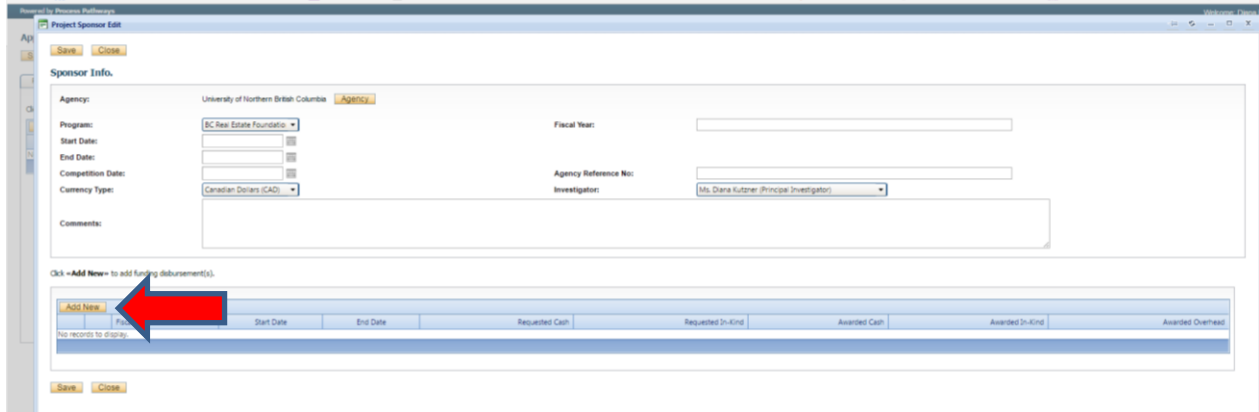


Enter the anticipated **Start Date** and **End Date** of your proposed project.

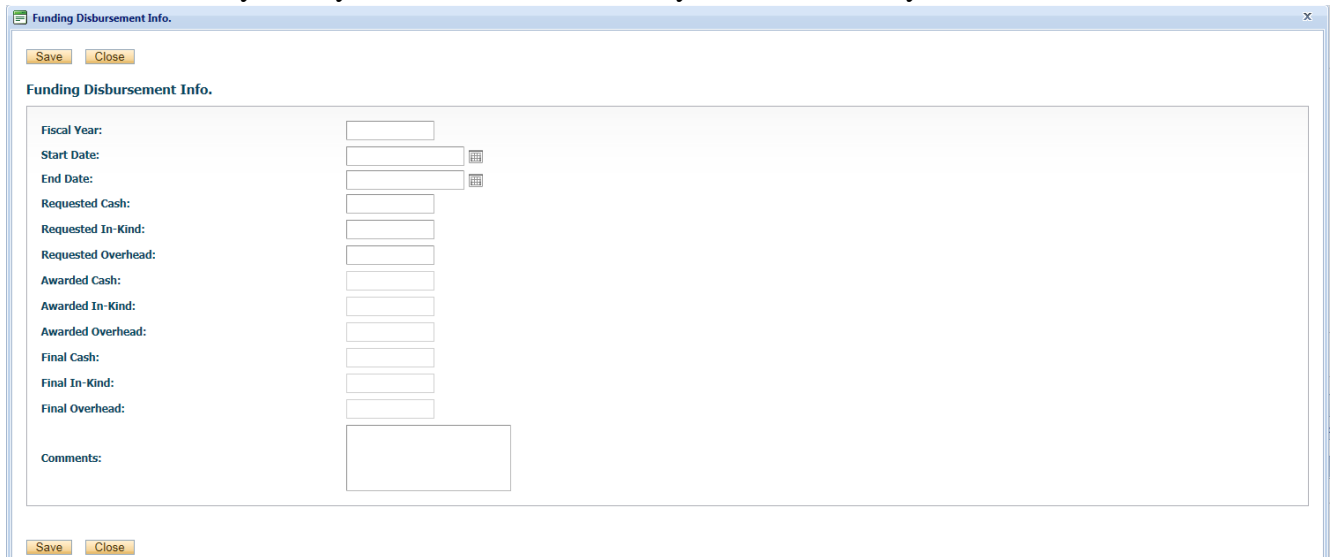
Enter the **grant application deadline**.

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. The Fiscal Year box will auto-populate when you enter the start and end dates. 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. For each year of funding, enter a disbursement by clicking on “**Add New**”. For multi-year projects, you will need to enter a separate disbursement for each year of funding.

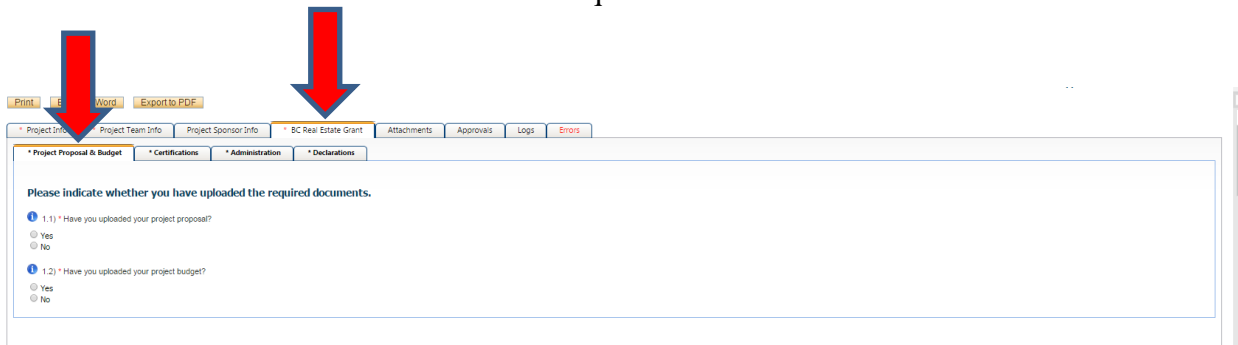


You will see a screen similar to the one below. Enter the start date and end date of your project. The fiscal year will automatically populate. Enter the requested amount of cash. Enter requested in-kind contributions (if applicable). Enter the overhead, if applicable. Enter any funding related comments you may have. Make sure to save your work before you exit the window.

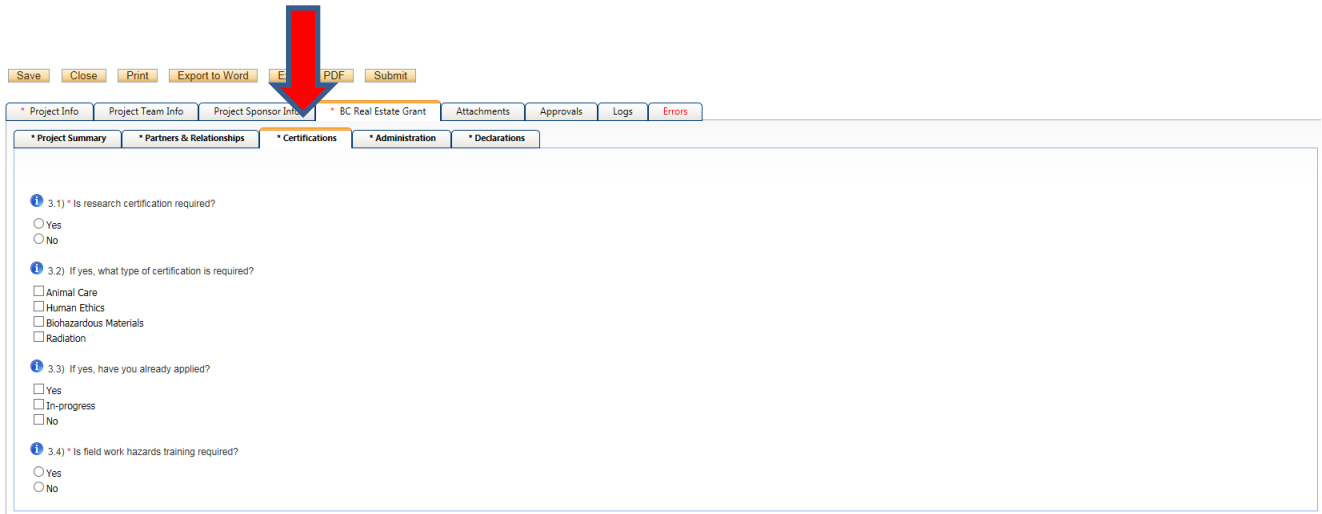


11. Next, proceed to the “**BC Real Estate Grant**” tab. The “**Project Proposal & Budget**” tab

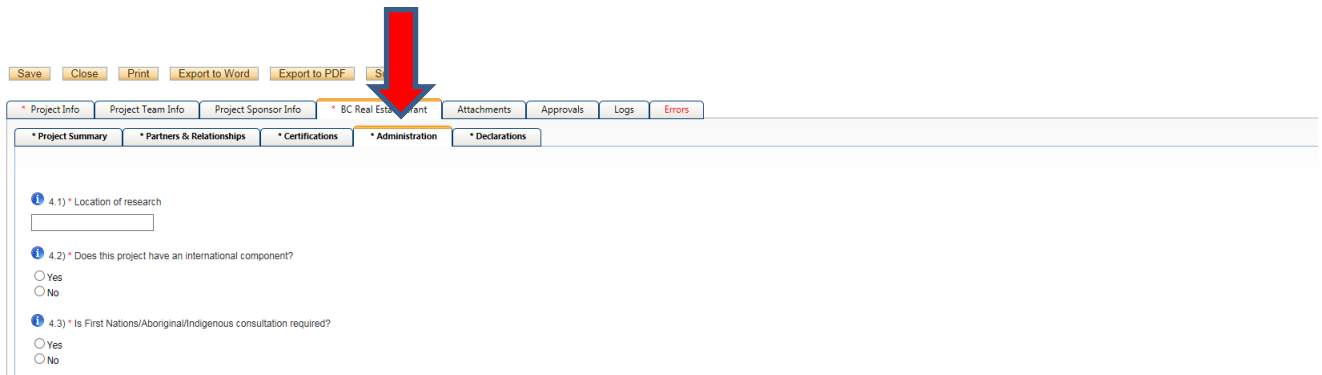
will open by default. The questions under this tab serve as a check / reminder to provide the required documents under the Attachments tab. Answer all of the applicable questions under this tab. Click on  for more information about a question.



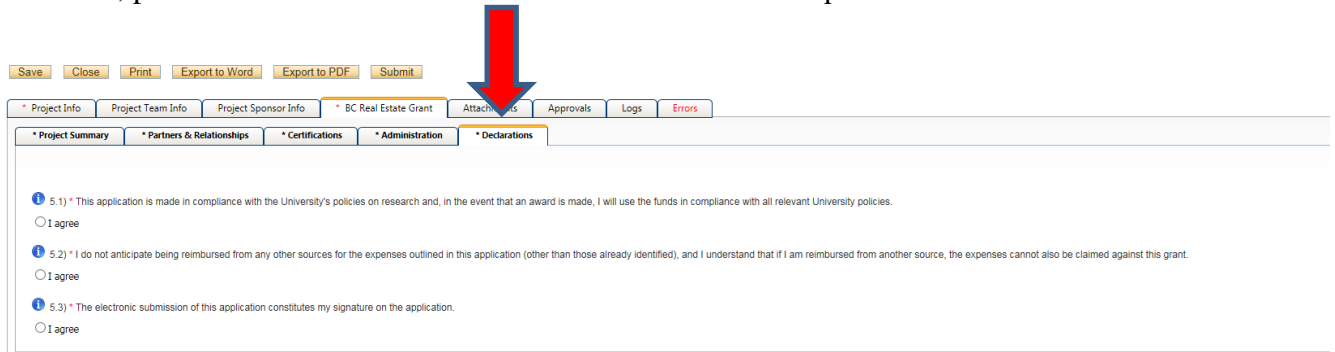
12. Next, proceed to the “**Certifications**” tab. Answer all of the applicable questions under this tab.



13. Next, proceed to the “**Administration**” tab. Answer all of the applicable questions under this tab.



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



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

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

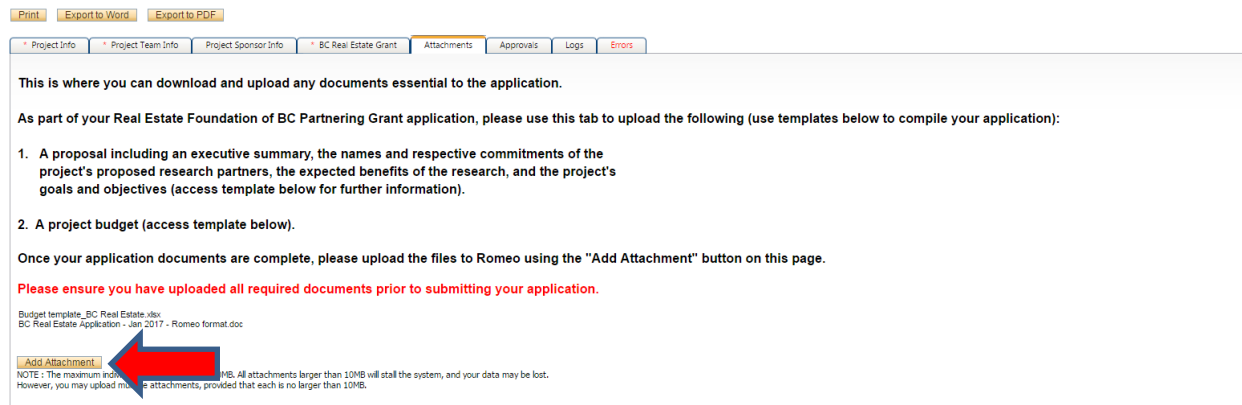
As part of your Real Estate Foundation of BC Partnering Grant application, please use this tab to download, complete, save and then upload the documents required for your application.

1. A **proposal** including an executive summary, the names and respective commitments of the project's proposed research partners, the expected benefits of the research, and the project's goals and objectives (access template and grant guidelines for further information).

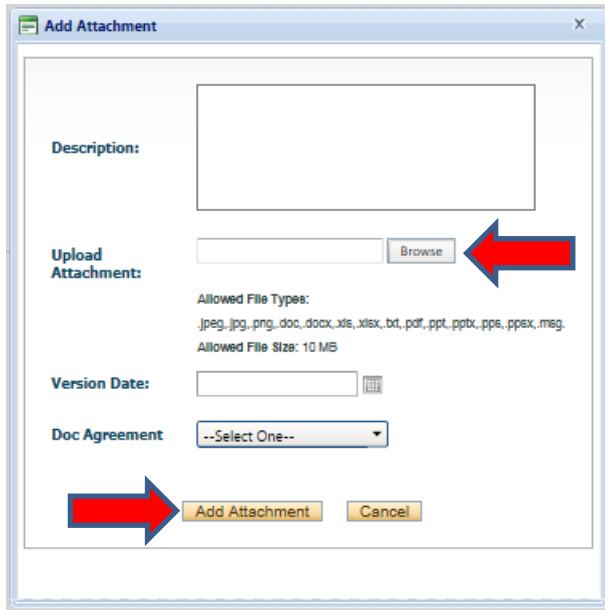
2. A project budget (access template and guidelines for further information).

Once your application documents are complete, please upload the files to Romeo using the "**Add Attachment**" button on this page.

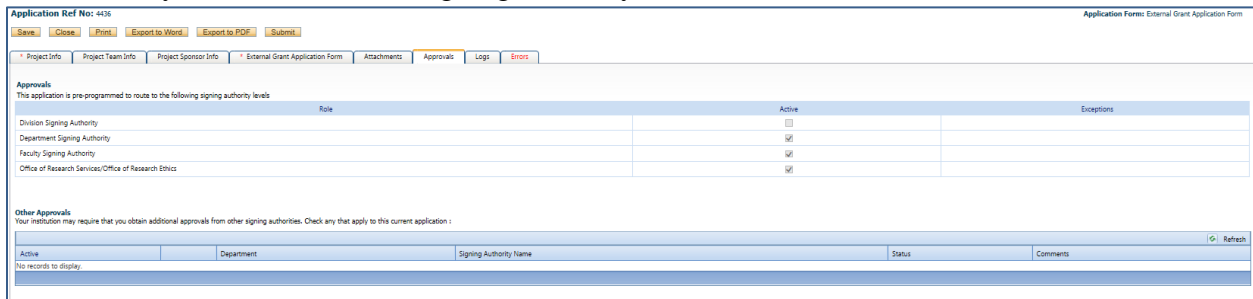
To upload your document: begin by clicking on “**Add Attachment**” (as in the screen below).



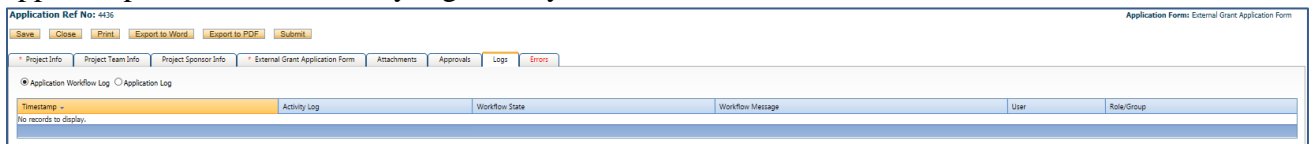
Browse for and upload your attachment. Enter the date of submission as the **version date**. Select the type of document you are uploading (Application, CV, etc.). Click on **“Add Attachment.”** Click on **“Save”** to save the information on this page.



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

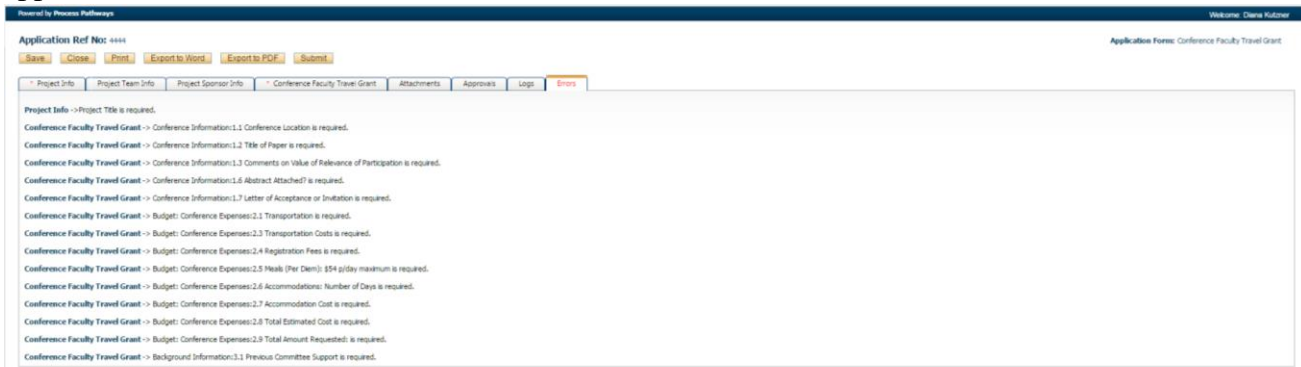


17. **“Logs”** tab. There is no information to be entered in this section. You can toggle between **“Application Workflow Log”** and **“Application Log”** to see where your application is at in the approval process and to see any log activity.



18. **“Errors”** tab. This section will show you where there are errors in your application form.

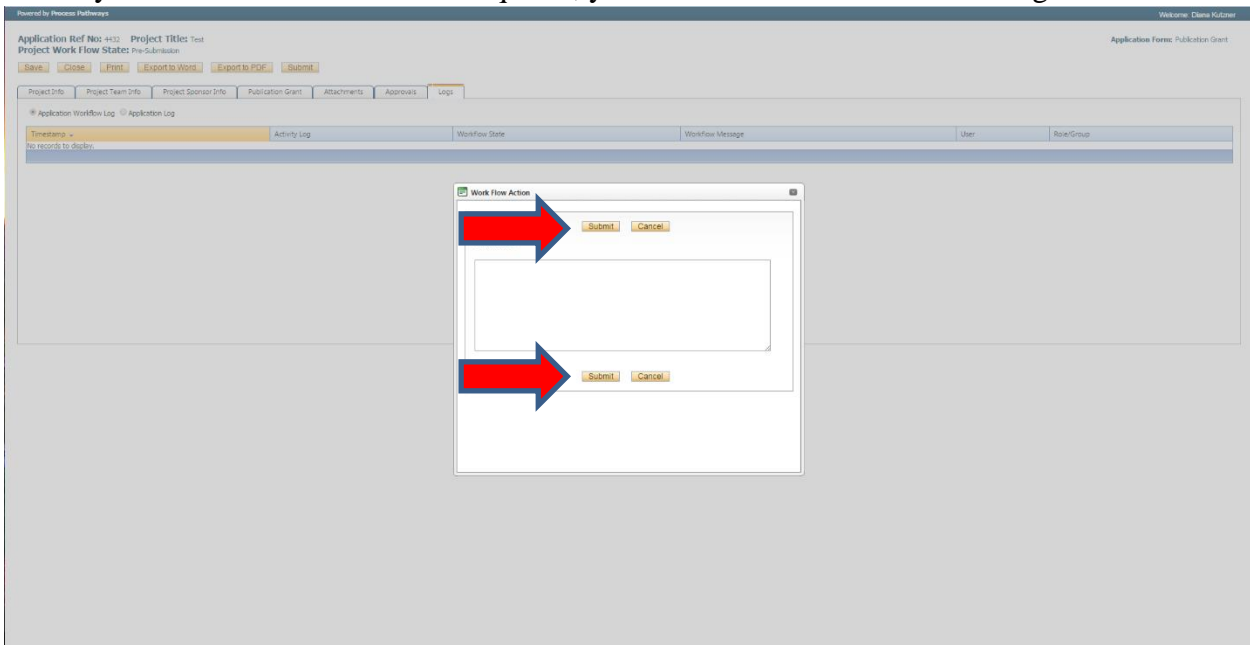
All errors must be corrected before you will be able to submit your application. Once all questions have been answered and errors are cleared, you will be able to “submit” your application.



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.

20. When you are ready, click to “**Submit**” your application. Once you do so, a Work Flow Action comment box will pop up. If you have any additional comments, enter them here. Please do not put any confidential or sensitive information in the comment box, as this can be seen by Office of Research and Innovation staff, signing authorities, and reviewers.

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.**”

