Nipissing’s ROMEO e-System

Pre-Authorization for Faculty Travel Request Form
To Access the online form:

- Open Nipissing University’s home page
- Click on the Research Tab
- Click the ROMEO logo
- You will be directed to the ROMEO Research Portal Log in page
• Enter your user name (e-mail address) and password, click Login to log into the Researcher’s Portal
Nipissing students and external users, trying to log in for the first time, will need to complete the **Self Registration Form** before they can access the Researcher’s Portal. Click Register from the Login page and complete the information required and submit. You will receive an e-mail from romeoadmin@nipissingu.ca to complete the registration process.

If you require further assistance, you can contact Dan St. Georges (ext 4644) or Martee Storms (ext 4055) in the Research Office.
You are now in the Researcher’s Home Page! To access application forms, click on “APPLY NEW”
• Select Pre-Authorization for Faculty Travel Form
Tab #1 – Project Info Tab

- Enter the title of the conference, the city and year of the conference.
- Enter the start and end dates of the conference or research travel.
- Enter keywords (optional) which describe your project/travel. Keywords can be selected from the drop down menu or typed directly into the text box.
- Save the tab

IMPORTANT: Please note that all fields preceded by * are required. Failing to complete these fields will prevent the user from submitting the form.
Tab #2 – Project Team Info

Project Team Info tab will auto-fill with your information.
This is required to indicate the source(s) of funds used for the travel.

- Click “Add New”
- Click “Agency”
- Select the Sponsor by typing the name, abbreviation or selecting from the list below
- Click “Search”
Select Nipissing University

You will return to the previous page and Nipissing University will be populated beside the Agency Tab. The same steps apply for other sponsors.
Click on the “Program” down arrow and select the correct program for use of funds.

Select Professional Expense Reimbursement for Faculty Travel or the correct Tri-Agency/Funding program from the drop down list.
Enter the start and end dates of the travel. The fiscal year will fill in automatically.

Enter your PER account number in the “Agency Reference No” field.
Click on “Add New” to add funding disbursements. This is used to indicate the amount of funds requested.
Enter the start and end dates of the travel. The fiscal year will fill in automatically.
Enter the requested amount of in the “Requested Cash” field.
Click Save
Tab #3 – Project Sponsor Info

- This will bring you to this screen which shows the relevant information for your request.
- Click Save.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>End Date</th>
<th>Requested Cash</th>
<th>Requested In-Kind</th>
<th>Awarded Cash</th>
<th>Awarded In-Kind</th>
<th>Awarded Overhead</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2015/05/24</td>
<td>2015/05/27</td>
<td>2,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

2,000.00 0.00 0.00 0.00 0.00
Tab #3 – Project Sponsor Info

- You will return to the main page for the Project Sponsor Tab. Here you can add another sponsor by following the same steps or you can edit the information.
- Save the Tab
Tab #4 – Pre-Authorization For Faculty Travel

- This tab includes all of the same questions and/or fields found on the paper form. Complete all questions.
- Click Save
All conference travel requests must include the conference program or agenda. The program can be attached to the application. Each attachment must be no larger than 5MB in size.

Click on “Add Attachment” and the following window will appear. Enter a description (title of the program) and browse to add the attachment. No need to complete the “Version Date or the Doc/Agreement field.

Click “Add Attachment”
Tab #5 – Attachments

- You will return to the main tab. You can edit or delete the attachment if the wrong file was attached or you can add another file to your request
- Click Save
The Errors tab will appear if a required field was not completed.

Click on the Errors tab and it will display where the errors are.

Go to the tab where the error(s) are, fixed the errors and save the tab once again and the Errors tab will disappear.
The Logs tab is a useful tool that allows the applicant, reviewer(s) and the Administrator to track the history of the application and communicate with one another. Text in blue font represents most recent updates.

- The “Workflow Logs” tracks and time stamps approval and messages.
- The “Project Logs” tracks and time stamps every action taken on the application.
Submitting the Application

- Start by clicking the “Submit” button at the top of the screen to open the “Work Flow Action: screen
- Please enter a comment in the textbox provided. Comment can be a simple sentence (i.e. Submitting application for review).
- Click on one of the two “Submit” buttons located at the top and the bottom of the “Work Flow Action” screen to submit your application for review
Submitting the Application

- You will receive an email from “romeoadmin” to let you know your application/request was submitted successfully.

```plaintext
Faculty/Research Travel Request Submitted to Office of Research

romeoadmin@nipissingu.ca

February 18, 2015
Hi Mr. Test St Georges,

Your PRE-AUTHORIZATION FOR FACULTY / RESEARCH TRAVEL titled “2015 CARA National Conference Toronto, Ontario” for travel from 5/24/2015 to 5/27/2015 has been successfully submitted to the Dean for approval. You will be notified via email should your application be returned to your attention for additional information or clarifications. At any time, you can login to the Research Portal to monitor the workflow status of your application.

Sincerely,
Office of Research Services

Note: If you encounter any issue with the Research Portal’s online submission process, please do not hesitate to contact our system administrator at romeoadmin@nipissingu.ca
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Applications Under Review

- Once you have submitted the application for review, you will be unable to make any changes to the application. However, it is still available for viewing under “Applications (Submitted – Under Review)”
- By clicking on the “Applications – Under Review”, Click “View” you will be brought to the application.

<table>
<thead>
<tr>
<th>Role: Principal Investigator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications (Saved - Not Submitted)</td>
</tr>
<tr>
<td>Applications (Submitted - Requiring My Attention)</td>
</tr>
<tr>
<td>My Reminders</td>
</tr>
<tr>
<td>Applications (Submitted - Under Review) [Click here...]</td>
</tr>
<tr>
<td>Applications (Submitted - Post Review) [Click here...]</td>
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<tr>
<td>Applications (Withdrawn) [Click here...]</td>
</tr>
</tbody>
</table>
Applications Under Review

- Click the “Logs” tab and the text in “blue” shows where the application is within the workflow.
If the reviewer(s) require any revisions, the application will be pushed back to the applicant. At this stage, you will be able to edit the application by clicking on this link: “Applications (Submitted – Requiring my Attention)”. 

![Applications Requiring Revisions]

Role: Principal Investigator

- Applications (Saved - Not Submitted) (0)
- Applications (Submitted - Requiring My Attention) (0)
- My Reminders (0)
- Applications (Submitted - Under Review) [Click here...]
- Applications (Submitted - Post Review) [Click here...]
- Applications (Withdrawn) [Click here...]
Once the application has been approved, the P.I. will receive an email. The application can no longer be modified but is available for viewing under “Applications (Submitted – Post Review)”.

Role: Principal Investigator

- Applications (Saved - Not Submitted) (0)
- Applications (Submitted - Requiring My Attention) (0)
- My Reminders (0)
- Applications (Submitted - Under Review) [Click here...]
- Applications (Submitted - Post Review) [Click here...]
- Applications (Withdrawn) [Click here...]
Need Assistance/have a question

- Should you require any assistance or have any questions please contact the ROMEO Administrator at romeoadmin@nipissingu.ca