

## Office of Research Services ROMEО Research Portal Guides

### How to Submit an Agreement for ORS Legal Review (No Account Opening)

If the Principal Investigator would like to prepare an agreement that's related to a specific project in ROMEО, click **Applications: Post-Review** from the ROMEО homepage.

Role: Principal Investigator	
<a href="#">Applications: Drafts</a>	(0)
<a href="#">Applications: Requiring Attention</a>	(0)
<a href="#">Applications: Under Review</a>	(0)
<a href="#">Applications: Post-Review</a>	(0)
<a href="#">Applications: Withdrawn</a>	(0)

Locate the relevant project and click the Events button.

	File No	Project Title	Principal Investigator	Application Type
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All
<div style="display: flex; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px;">View</span> <span style="border: 2px solid red; padding: 2px;">Events</span> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">Latest Workflow</div>	1035984	Test	Jaq-Lin Larder (VP, Research and Innovation (Dalhousie)\Office of Research Services)	(Awards\Awards)

Select the Agreement for ORS Legal Review form.

### Create New Event

Event Form Name	Description
<a href="#">Agreement for ORS Legal Review (No Account Opening)</a>	Application f confidential c
<a href="#">Transfer of Funds Request</a>	Outgoing tra

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Agreement for ORS Legal Review** tab (mandatory), the **Attachments** tab (uploading additional documentation) and the **Logs** tab (tracking edits made to the file overtime). The **Errors** tab displays any mandatory questions that need to be answered before the system will let the PI or project team member submit the form.

The screenshot shows a horizontal tabbed interface with five tabs: "Event Info", "Agreement for ORS Legal Review (No Account Opening)", "Attachments", "Logs", and "Errors". Below the tabs is a text input field labeled "Note(s)".

After responding to the questions under the Agreement for ORS Legal Review tab, and uploading any required documents to the Attachments tab, click the Submit button.

A row of six yellow buttons: "Save", "Close", "Print", "Export to Word", "Export to PDF", and "Submit". The "Submit" button is highlighted with a red rectangular border.

The screenshot shows the same horizontal tabbed interface as before, but with the "Errors" tab removed. The remaining tabs are "Event Info", "Agreement for ORS Legal Review (No Account Opening)", "Attachments", and "Logs".

Upon submission, the request will move from **Events: Drafts** to **Events: Under Review**. At this point, no edits can be made, and the file will be read-only. If the PI needs to make revisions, contact the relevant Administrator and they will enable editing mode.

### Create New Event

Event Form Name	Description
<a href="#">Agreement for ORS Legal Review (No Account Opening)</a>	Application for agreements to be drafted/reviewed by Of confidential disclosure agreements, etc.
<a href="#">Transfer of Funds Request</a>	Outgoing transfers from Dalhousie University to another

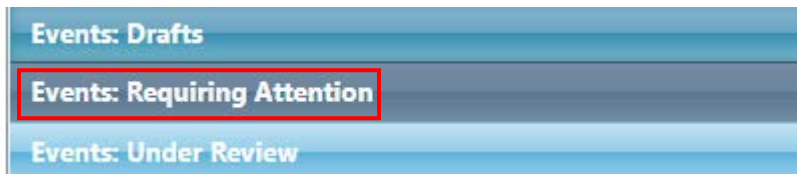
### File No: 1039454

Principal Investigator: Jaq-Lin Larder  
Project Title: test

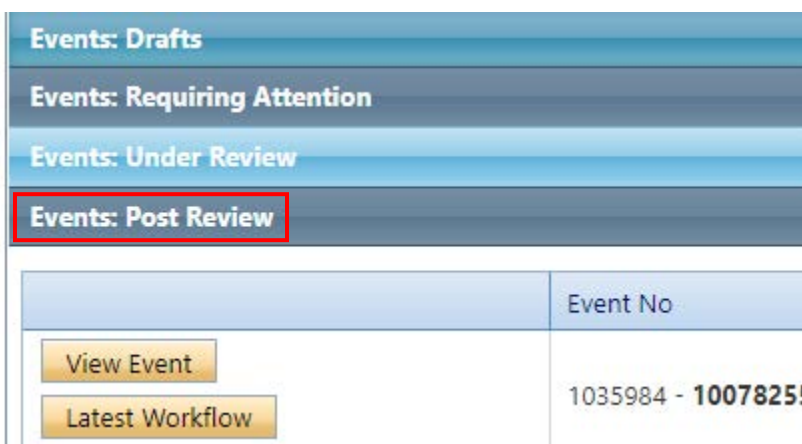
The screenshot shows a navigation menu on the left with three items: "Events: Drafts", "Events: Requiring Attention", and "Events: Under Review". A blue curved arrow points from "Events: Drafts" to "Events: Under Review", which is highlighted with a red border. Below the menu is a table with event details.

	Event No	Event Category
<a href="#">View Event</a> <a href="#">Latest Workflow</a>	1039454 - <b>10099388</b>	Related Agreement Legal Review (No

If the Administrator returns the form for revisions, the PI and project team members will receive an automatic email notification with instructions. The form will appear under **Events: Requiring Attention**, which can also be accessed directly from the homepage.



If the Administrator approves the request, they will notify the PI. The form will move from **Events: Under Review** to **Events: Post-Review**.



For questions about your application, please contact [orslegal@dal.ca](mailto:orslegal@dal.ca).

For technical assistance with the portal, please contact [researcher.portal@dal.ca](mailto:researcher.portal@dal.ca).