

Welcome to the 3rd of 4 training modules for **ROLA** (Research On-Line Administration). This module will guide you on how to *Extend Access by PI* to a **Proposal, Award, or Project** in **ROLA**

This module covers

Profile Review
Extend Access by PI

Each frame will provide text instructions as well as graphic views to demonstrate how easy it is maintain your PI information and to extend access to research support staff within **ROLA**.

Here we go!

Information can be found in modules 1, 2 & 4 for the following **ROLA** Functions

[Complete and Maintain Proposal](#)
[Submit Proposal/Review Approval Status](#)
[How do I Gain/Maintain Access to ROLA](#)



Sponsored Research– Profile Review

All users will have a *Profile Review* page available to view in **ROLA**

Profile Review has four screens that we will visit one at a time. The first, *Appointment* displays a number of things about an individual in **ROLA**.

ROLA uses email to notify you of a required action within the system. The email address used by the system is your corporate Western email address (USERID@uwo.ca), per the Western E-mail Policy found here: <http://www.uwo.ca/univsec/mapp/section1/mapp145.pdf>

If you wish to receive your email at a different email address, you will need to ensure that your @uwo.ca address is activated and forwarded to the address of your choice.

NOTE: If an address other than the corporate Western email address is added, it is your responsibility to ensure that this address is kept up to date. RD&S cannot be responsible for information that is sent to an email address other than the corporate uwo.ca email.

The screenshot displays the Research WESTERN ROLA system interface. On the left is a navigation menu with the following items:

- Menu
- Search: [input field]
- My Favorites
- Employee Self-Service
- Manager Self-Service
- UWO Menu
- Accounts Payable
- Accounts Receivable
- Billing
- Commitment Control
- Customers
- Grants (ROLA II)
- Sponsored Research
 - Profile Review (highlighted)
 - Proposals
 - Awards
 - Grant Support
 - Authorization & Access
 - Relationship Management
 - Agreement
 - Sponsors
 - Notes & Milestones
 - Institutions
 - Departments
 - Professionals
 - Document Retrieval
 - Purchasing
 - Travel and Expenses
 - Vendors
 - Order Management
 - Services Procurement
 - Project Costing
 - Set Up Financials/Supply Chain
 - Tree Manager
 - Reporting Tools
 - PeopleTools

The main content area shows the 'Appointment' screen for user 'RWISWAN' (Swan,Isabella) at 'UWO'. The screen includes the following sections:

- User Information:** User ID: RWISWAN, Name: Swan,Isabella, Institution: UWO
- Email Section:**

Email Type	Email Address
1 Campus	rwiswan@uwo.ca
- Eligibility Section:**

PI Eligibility: Calculated Eligibility: Set Eligibility: Request Assistance:
- Active Appointments Section:**

Dept. ID	Faculty	Department	Appointment	Appointment Type
1 260600	Faculty of Engineering	Engineering - Mech/Materials	Professor	Tenured
- Affiliations Section:**

Institution	Name
1	[input field]
- Sponsor PIN ID Section:**

Sponsor ID	Sponsor Name	Sponsor PIN
1	[input field]	[input field]
- Link to.....**

[Request Profile Change](#)

PI eligibility and active Departmental appointments are listed on this first screen of the *Profile Review*. This information is driven by Western's Human Resources, and as such appointment details will not be available within **ROLA** until they have been completed by the Faculty/Department through to HR. This screen will show all active appointments you hold at Western.

You must have at least one eligible appointment in order to hold a research grant at Western.

If you feel the information shown is incorrect please contact your departmental HR Administrative Officer or Donna Chute-Dolan in Western's Human Resources directly.

PI Eligibility: Y				Request Assistance <input checked="" type="checkbox"/>		
▼ Appointments (Click on arrow at left to show/hide data area) Customize Find  First <input type="button" value="1-2 of 2"/> Last						
Dept. ID	Faculty	Department	Appointment	Appointment Type	Status	
1 260400	Faculty of Engineering	Engineering - Electrical/Comp	Associate Professor	Tenured	Active	
2 260820	Faculty of Engineering	Particle Technology Research C	Associate Professor	Tenured	Active	
▼ Affiliations (Click on arrow at left to show/hide data area) Customize Find  First <input type="button" value="1 of 1"/> Last						
*Institution	Name					
1						<input type="button" value="+"/> <input type="button" value="-"/>

The *Department Status* Tab, displays details of your Faculty, Departmental appointments. This information is driven by Western's Human Resources, and as such details will not be available within **ROLA** until they have been completed by the Faculty/Department through to HR.

This screen will show the Faculty/Departmental affiliations you hold. The **ROLA** signatories for each affiliation are listed as well as Departmental eligibility to hold a grant at Western.

Only those affiliations that are eligible to hold a grant at Western will be displayed within **Proposal** as an option for the administering department within the Projects tab.

At the bottom of *Department Status*, **ROLA** requests your authorization to disclose data to RD&S for the purpose of evaluating potential future research opportunities.

UWO Financials Home

Menu

Search:

- My Favorites
- UWO Menu
- Grants (ROLA II)
- Sponsored Research
 - Profile Review
 - Extend Access by PI
- Proposals
- Authorization & Access
- Reporting Tools
- PeopleTools
- My Personalizations

Appointment | **Department Status** | Grants - Policies | Funding Announce

Employee ID: 7RW000004 Hale, Jasper UWO

PI Eligibility: Y

Click on arrow at left to show/hide data area Customize | Find | First 1-2 of 2 Last

Dept. ID	Department	Chair/Alternate Chair	Dean/Alternate Dean	Dept. Eligible to Hold Grant
1 260400	Engineering - Electrical/Comp	CHSG,Eelec	Dean,Engineering	Eligible
2 260820	Particle Technology Research C		Dean,Engineering	Eligible

I authorize disclosure of data to RS&S for research opportunities: Yes No

Save Return to Search Notify Refresh Update/Display Include History

Appointment | Department Status | Grants - Policies | Funding Announce

Grants - Policies allows you to review the Policies associated with each of the main **ROLA** functions.

UWO Financials Home

Menu

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- Proposals
- Authorization & Access
- Reporting Tools
- PeopleTools
- My Personalizations

Appointment | Department Status | **Grants - Policies** | Funding Announce

Employee ID: 7RW000004 Hale, Jasper UWO

Click on arrow at left to show/hide data area		Customize End First 1 of 4 Last
1	Proposal Approval	Review Policy
2	Proposal Approval (URG)	Review Policy
3	PI Profile	Review Policy
4	New Employee Access Policy	Review Policy

Appointment | Department Status | Grants - Policies | Funding Announce

Funding Announce allows you to personalize the funding announcement information that can be sent via email by **ROLA**. You may add or delete disciplines as desired as your individual preference, or turn off Funding Announcements completely.

This feature will be useful if you wish to authorize research support staff to access your **Proposals** and have others act on funding announcements on your behalf. Caution is suggested if you choose to turn off the Email announcements. You will be responsible to reinstate this process should your research support staff leave your employment and you wish to receive Email announcements directly.

UWO Financials

Home

Menu

Search: []

- My Favorites
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- Grants (ROLA II)
 - Sponsored Research
 - Profile Review
 - Extend Access by PI
 - Proposals
 - Authorization & Access
 - Reporting Tools
 - People Tools
 - My Personalizations

Appointment | Department Status | Grants - Policies | **Funding Announce**

Employee ID: 7RW000004 Hale, Jasper UWO

Funding Announcement

I wish to receive Funding Announcements via email: Yes No

Click on arrow at left to show/hide data area Customize | Find | First | 1-3 of 3 | Last

	Discipline Code	Discipline Description		
1	ENG	ENGINEERING	+	-
2	MEDS	MEDICAL SCIENCES	+	-
3	PHYS	PHYSICAL SCIENCES	+	-

Save Return to Search Notify Refresh Update/Display Include History

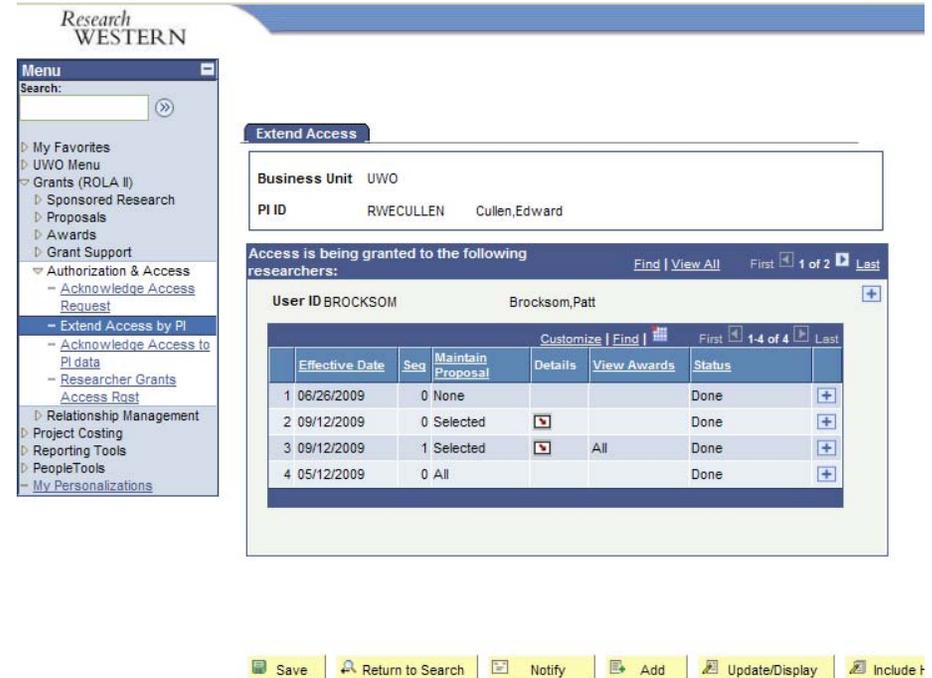
Appointment | Department Status | Grants - Policies | Funding Announce

EXTEND ACCESS by PI

Extend Access by PI in **ROLA** is found within *Authorization & Access* in the **ROLA** menu. You will only be able to view your own information within this function.

Extend Access by PI allows you to assign other users the ability to view or maintain your **Proposal, Award** and **Project** details at whatever level is appropriate for you and your supporting users.

You can add  as many authorized users as you wish by working through the following steps.



The screenshot shows the Research Western system interface. On the left is a navigation menu with the following items: My Favorites, UWU Menu, Grants (ROLA II), Sponsored Research, Proposals, Awards, Grant Support, Authorization & Access (expanded), Acknowledge Access Request, **Extend Access by PI** (highlighted), Acknowledge Access to PI data, Researcher Grants Access Rost, Relationship Management, Project Costing, Reporting Tools, PeopleTools, and My Personalizations.

The main content area is titled "Extend Access" and displays the following information:

- Business Unit:** UWU
- PI ID:** RWECULLEN Cullen,Edward

Below this, it states "Access is being granted to the following researchers:" with a search bar and "Find | View All" options. The current view shows "1 of 2" researchers.

The first researcher is "User ID BROCKSOM" with the name "Brockson,Patt". Below this is a table with the following columns: Effective Date, Seg, Maintain Proposal, Details, View Awards, Status, and a plus icon. The table contains four rows of data:

	Effective Date	Seg	Maintain Proposal	Details	View Awards	Status	
1	06/26/2009	0	None			Done	
2	09/12/2009	0	Selected			Done	
3	09/12/2009	1	Selected		All	Done	
4	05/12/2009	0	All			Done	

At the bottom of the page, there is a navigation bar with the following buttons: Save, Return to Search, Notify, Add, Update/Display, and Include t.

Choose Extend Access by PI from the menu

The screenshot shows a navigation menu on the left with the following items: Grants (ROLA II), Sponsored Research, Proposals, Awards, Grant Support, Authorization & Access, Audit, Security Audits, Grants Access Request, Acknowledge Access Request, Authorize Access Request, Activate Access Request, Grants Access Inquiry, **Extend Access by PI**, Acknowledge Access to PI data, Researcher Grants Access Rqst, and Relationship Management. The 'Extend Access by PI' item is highlighted.

The main content area is titled 'Extend Access by PI' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Find an Existing Value' tab is active. There is a 'Business Unit' dropdown menu with 'begins with' and 'UWO' selected. Below the dropdown are checkboxes for 'Include History' (unchecked) and 'Correct History' (checked). There are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search area is a 'Search Results' section with 'View All', 'First', '1 of 1', and 'Last' options. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

If this is the first person you are extending access to, you will need to add a new value to establish a record for your information.

Choose the Add a New Value tab and then click on the

Add

button.

The screenshot shows the same navigation menu as the previous image, with 'Extend Access by PI' highlighted. The main content area is titled 'Extend Access by PI' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is active. There is a 'Business Unit' dropdown menu with 'UWO' selected. Below the dropdown is a yellow 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Once you are in the Extend Access panel you will be able to view and maintain the rows for those individuals you have already extended access to and add additional users to your record.

If you need to add a new individual in a new row click on the  sign of the last row in your record.

You may search for and grant authorized access to your information within the following functions for any current user in HR.

Click on the search icon  next to the USERID field to identify the individual to which you wish to extend access.

You may search for the individual by USERID or Name

Click on the name of the individual you wish to extend access to from the list.

- ▾ Grants (ROLA II)
 - Sponsored Research
 - Proposals
 - Awards
 - Grant Support
- ▾ Authorization & Access
 - Audit
 - Security Audits
 - [Grants Access Request](#)
 - [Acknowledge Access Request](#)
 - [Authorize Access Request](#)
 - [Activate Access Request](#)
 - [Grants Access Inquiry](#)
 - **Extend Access by PI**
 - [Acknowledge Access to PI data](#)
 - [Researcher Grants Access Rqst](#)
- Relationship Management
- Agreement
- Sponsors

User ID:

Name:

[Basic Lookup](#)

Search Results

View All First 1-100 of 112 Last

User ID	Name
ASMIT257	Smith,Alan
ASMIT292	Smith,Alisha
ASMIT294	Smith,Allison
ASMIT227	Smith,Allison M
ASMIT336	Smith,Amanda FD
ASMITH39	Smith,Andrew David Allan
ASMIT66	Smith,Andrew J
ASMIT73	Smith,Angie
ASMIT337	Smith,Ashley
C:SMIT244	Smith,Cameron

Choose the access appropriate for the individual for your Proposal and/or Award information

The functions available are:

Maintain Proposal	Ability to view and maintain proposals including initial submit (PI final submit still required)
View Awards	Ability to view basic Award information

The levels of access available are:

None	no access granted at this level to any information
Selected	access granted for specific Proposals, Awards or Projects associated with the PI granting the access
All	access granted for all Proposals, Awards or Projects associated with the PI granting the access

If you wish to extend access to a selected proposal or award you will indicate the details of that choice by clicking on the details icon that appears to the left of the dropdown box. 

Extend Access

Business Unit UWO
 PI ID SHANNON Woodhouse,Shannon M

Access is being granted to the following researchers: Find | View 1 First 1-2 of 2 Last

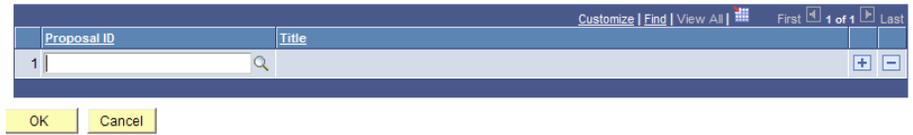
User ID CSIROYT2 Siroyt-Vandelaar,Christine

Effective Date	Seq	Maintain Proposal	Details	View Awards	Status
06/10/2009	0	None			Done
10/06/2009	0	Selected			Pending
02/10/2009	0	All			Done

User ID RWISWAN Swan,Isabella

Effective Date	Seq	Maintain Proposal	View Awards	Status
06/10/2009	0	All		Done

By clicking on the search icon  you will be able to choose from any of your proposals or awards.



Look Up Proposal ID



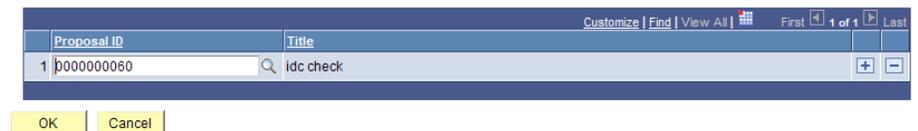
Select the appropriate proposal or award

Search Results

View All

Business Unit	Proposal ID	Sponsor	Funding Source	Program Name
UWQ	000000027	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INSTITUTIONAL
UWQ	000000031	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INDIVIDUAL WIT
UWQ	000000043	Council of Research Western	Council of Research Western	EXTERNAL INSTITUTIONAL
UWQ	000000045	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWQ	000000046	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWQ	000000052	Foundation Virginia	Foundation Virginia	PROGRAM FOR FOUNDATIC
UWQ	000000053	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWQ	000000055	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL DEPARTMENT.H
UWQ	000000060	Council of Research Western	Council of Research Western	EXTERNAL DEPARTMENT.H
UWQ	000000061	Council of Research Western	Council of Research Western	EXTERNAL INDIVIDUAL WIT
UWQ	000000067	Training Society of ROLA	Training Society of ROLA	EXTERNAL INDIVIDUAL/COI
UWQ	000000068	Council of Research Western	Council of Research Western	EXTERNAL DEPARTMENT.H
UWQ	000000069	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWQ	000000070	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INDIVIDUAL WIT

and choose OK. You will be taken back to the Extend Access screen where you should save the changes you've made at this time.



Once you have granted an individual access, a message will be sent via email to the individual with instructions to acknowledge the access granted in **ROLA**.

In this example a user was given access to Maintain Proposal for ALL, and you can see now that they are listed in the **Proposal** on the resources tab as “Authorized”.

The screenshot displays the UWO Financials interface. On the left is a navigation menu with options like 'My Favorites', 'UWO Menu', 'Grants (ROLA II)', 'Sponsored Research', 'Proposals', and 'Maintain Proposal'. The main content area shows details for a proposal with ID 0000000360, Business Unit UWO, and PI Name Hale, Jasper. Below this is a table of resources for the project 'Electronics of Engines'. The table has columns for Number, Employee ID, Name, Role, Department, and % Effort. Two resources are listed: Hale, Jasper (PI, 260400, 100.00%) and Swan, Isabella (Authorized, 100.00%).

UWO Financials

Home Add to

General Info Details Projects Resources Location Certification Key Words

Proposal ID: 0000000360 Business Unit: UWO PI Name: Hale, Jasper
Version ID: V1 Total Budget: 0.00
Title: Electronics of Engines

Please select Employee ID to add Western resources (e.g. CO-PI) for this project.
Non-Western CO-PIs may be added as "CO-PI Ext". See Help for details.
Effort represents % of researcher time for this project.

Proposal Project Find | View All First 1 of 1 Last

Proposal Project ID: 0010000540 Electronics of Engines Project Budget: 0.000

Number	Employee ID	Name	Role	Department	% Effort
10	*****	Hale, Jasper	PI	260400	100.00
20	*****	Swan, Isabella	Authorized		

Click here to continue on to view the [Gain/Maintain Access to ROLA Training Documentation](#).