

July 2025

ROLA Manual

MODULE II



Western
Research

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Approval Status Review

ROLA

Research OnLine Administration

Proposals

Maintain Proposal

Print Proposal Summary

Approval Status Review

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Approve Proposals

Proposal Review Workflow

Internal Award Funding

Generate Award

Reset Proposal Status

Proposal Partner Funds

Withdraw Proposal

Update GM Proposal Type

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Awards

Sponsors

Authorization and Access

Administration

Grant Support

Approval Status Review

Find an Existing Value

Add a New Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches

Choose from recent searches

Saved Searches

Choose from saved searches

*Business Unit

=

UWO

Proposal ID

begins with

%

Version ID

begins with

User ID

begins with

Name

begins with

Sponsor ID

begins with

Name

begins with

Fund Source ID

begins with

Program Name

begins with

Competition ID

begins with

Status

=

Department ID

begins with

Short Title

begins with

Show fewer options

Case Sensitive

Search

Clear







Welcome to the second part of the training guides for **ROLA** (Research On-Line Administration). You can review the Approval Status of a Proposal at any time by selecting *Approval Status Review* in **ROLA**. You can search for your proposal by entering the **Proposal ID** or any other criteria displayed on the search page.

Approval Status Review

Proposal ID: 0000XXXX
Version ID: V1
Business Unit: UWO

Title: TEST_INDIGENOUS
PI, Name

[Proposal Approval](#)

Activity	Name	Detail	Department	Approval Status	Date/Time	Approval Status
Submit	PI, Name			Complete	07/24/24 3:26PM	Approved
Department AO Review	AO, Name		YYYYYY	Complete	07/25/24 10:31AM	Reviewed
Chair Authorize	Chair, Name		YYYYYY	Complete	07/25/24 10:32AM	Approved
Dean Authorization	Dean, Name		ZZZZZZ	Complete	07/25/24 10:37AM	Approved
RS Review	ORS Reviewer, Name			Complete	07/25/24 10:38AM	Reviewed
RDS Approval	ORS Approver, Name			Complete	07/25/24 10:39AM	Approved

[View Proposal](#)

Save
Return to Search
Notify

Add
Update/Display

Approval Status Review will display the list of individuals involved in the Authorization queue for the chosen **Proposal**. You will be able to see the Activity/Role, to whom it has been assigned, the status of their action, and any comments made in the **Details** icon.

Email notifications are sent automatically through the ROLA system to the next person in the Approval process (viewable on the Approval Status Review table).

The email includes identifying details and instructs the recipient with the following:

“To ensure the proposal moves through the approval process in a timely manner, please Approve the document via the following URL.”

Selecting the URL, the recipient will be prompted to log into the ROLA system and be able to select one of the following options:

View Report – View a PDF summary of the ROLA Proposal in PDF.

View Proposal – Review the completed ROLA Proposal submitted by the PI.

Application – Review a PDF copy of the Application if supplied to Western Research by the PI.

Return to PI – Return the Proposal to the PI and reset to “Draft” status with comments .

Approve/Review – Apply your electronic Approval/Review (equivalent to your legal signature) and move the Proposal to the next person in the Approval process.

Proposal Approval

Proposal Approval

Proposal ID: XXXXXXXX

Version ID: V1

Business Unit: UWO

Title: yes

PI Name: PI, Name

Sponsor ID: XXXXXXXX

Program ID: XXXXX

Competition ID: XXXXXX

Fund Source ID: XXXXXXXX

NATURAL SCIENCES & ENGINEERING RESEARCH

DISCOVERY GRANTS

2024 COMPETITION

NATURAL SCIENCES & ENGINEERING RESEARCH

Has this Application been peer reviewed?

☐ Yes
 ☒ No

[View Application](#)

Approval Notes

Name: PI, Name

Submit

Date Time: 07/30/2024 4:34PM

Status: Complete

Comments:

This Proposal was submitted by PI, Name

Name: Dean, Name

Dean Authorization

Date Time:

Status: Open

Comments:

Approver Responsibilities:

PI Responsibility	Review
Chair Authorization Responsibility	Review
Dean Authorization Responsibility	Review

View Report

Approve

Return to PI

Application

View Proposal

Save

Return to Search

Previous in List

Next in List

Profile Review

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

ROLA uses emails to notify you of required actions within the system. The email address used by the system is your corporate Western email address (USERID@uwo.ca) per [Western's email Policy](#).

If you wish to receive your email at a different email address, you will need to ensure 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 this address is kept up to date. Western Research is not responsible for information that is sent to an email address other than the corporate uwo.ca email.

ROLA

Research OnLine Administration

Proposals
Awards
Sponsors
Authorization and Access
Program to CPI Mapping
Professional Data
Job & Employment Data
User Profiles
Grants Access Inquiry
Researcher Grants Access Rqst
Grants Access Request
Acknowledge Access Request
Authorize Access Request
Activate Access Request
Extend Access by PI
Profile Review
Signatory/Administrator Audits
Expiring Role Audit
Administration
Grant Support

Appointment
Department Status
Grants - Policies
Administration
Funding Announce

User ID: XXXXX
PI, Name
UWO

Email (Click on arrow at left to show/hide data area)

Email Type	Email Address
1 Campus	abc@domain.ca

PI Eligibility: Y
Calculated Eligibility: N
Set Eligibility:
Request Assistance:

Active Appointments

Dept. ID	Faculty	Department	Appointment	Appointment Type
1				

Affiliations (Click on arrow at left to show/hide data area)

Institution	Name
1	

Sponsor PIN ID (Click on arrow to show/hide data area)

Sponsor ID	Sponsor Name	Sponsor PIN	Sponsor CPI
1			

Link to.....
[Request Profile Change](#)

Save
Return to Search
Previous in List
Next in List
Notify
Refresh

Update/Display
Include History

Western Research collects and maintains Sponsor PIN ID information, which is utilized in corporate financial reports to the Tri Councils (CIHR/NSERC/SSHRC).

We ask that you input Sponsor PINs for any of the Tri Councils with which you are affiliated.

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 HRIS system, and as such, appointment details will not be available within ROLA until they have been completed by the Faculty/Department and submitted through HR. This screen will show all active appointments you hold at Western. You must have at least one eligible appointment to hold a research grant at Western.

If you feel the information shown is incorrect, please report using [Ask HR](#)

Appointment
Department Status
Grants - Policies
Administration
Funding Announce

User ID: XXXXX
PI, Name
UWO

PI Eligibility: Y

Click on arrow at left to show/hide data area

	Dept. ID	Department	Chair/Alternate Chair	Dean/Alternate Dean	Dept. Eligible to Hold Grant
1				Not Found	

I authorize disclosure of data to Western Research for research opportunities:
Yes ☒ No ☐

Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Update/Display
Include History

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

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 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 the **Proposal** as an option for the administering department within the General Info tab.

At the bottom of Department Status, ROLA requests your authorization to disclose data to WR to evaluate potential future research opportunities.

Appointment
Department Status
Grants - Policies
Administration
Funding Announce

User ID: XXXXX
PI Name
UWO

Click on arrow at left to show/hide data area

1
Meaning of Signatures For Researchers
Review Policy

2
RW Data Access Policy
Review Policy

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

Appointment
Department Status
Grants - Policies
Administration
Funding Announce

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

Appointment

Department Status

Grants - Policies

Administration

Funding Announce

Employee ID: XXXXXXX

PI, Name

UWO

▼ Click on arrow at left to show/hide data area

*Investigator ID

XXXXX

Overhead Account:

☐

Reapplication Assistance Count

0

Professional Type

Principal Investigator

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

Appointment

Department Status

Grants - Policies

Administration

Funding Announce

The Administration tab displays the existing overhead recovery account details along with the Investigator ID.

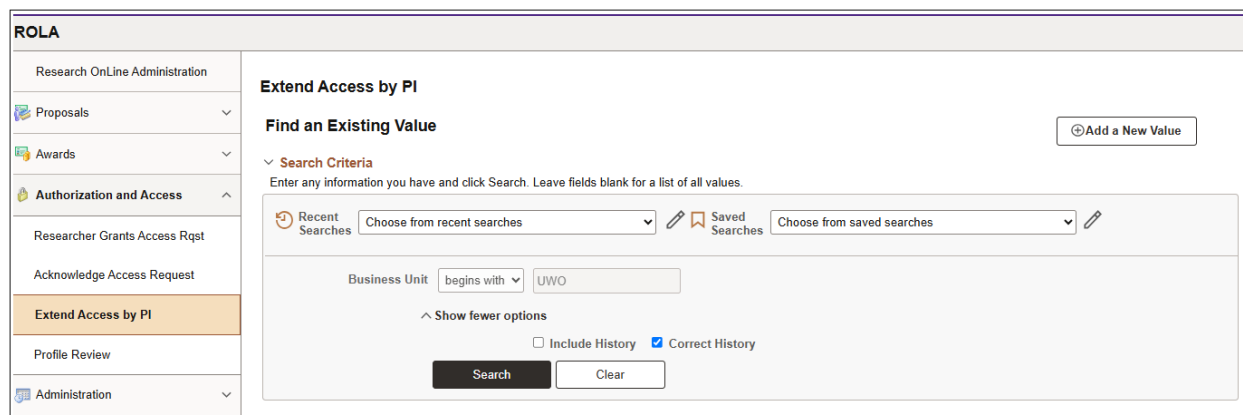
Extend Access by PI

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

It 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.

Choose Extend Access by PI from the menu.



ROLA

Research OnLine Administration

Proposals

Awards

Authorization and Access

Researcher Grants Access Rqst

Acknowledge Access Request

Extend Access by PI

Profile Review

Administration

Extend Access by PI

Find an Existing Value [Add a New Value](#)

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

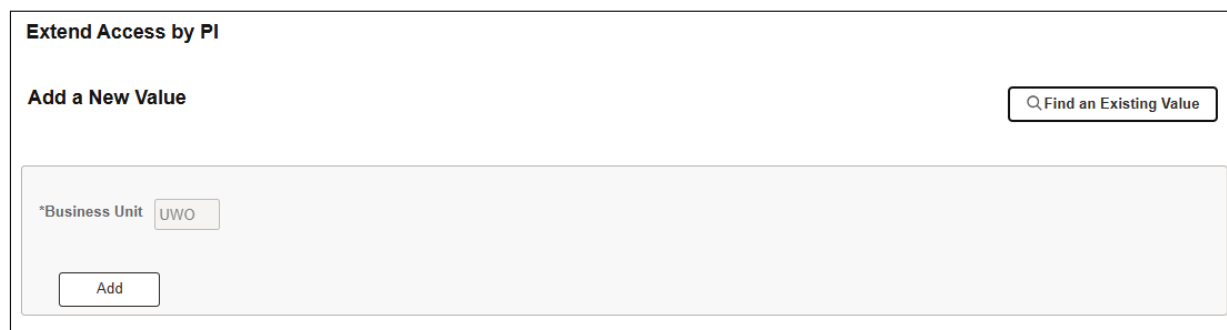
Business Unit begins with UWO

^ Show fewer options

☐ Include History ☒ Correct History

Search Clear

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.



Extend Access by PI

Add a New Value [Find an Existing Value](#)

*Business Unit UWO

Add

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

Once you are in the Extend Access panel, you can 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 plus sign of the last row in your record.

Extend Access

Business Unit UWO

PI ID XXXXXXX PI, Name

Access is being granted to the following researchers:

*User ID

1 of 1

<

>

View All

Effective Date

Seq

Maintain Proposal

View Awards

Status

1

04/24/2025

0

All

All

Pending

+

Save

Notify

Add

Update/Display

Include History

Correct History

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 search results list.

Look Up

User ID begins with

Name begins with

Search

Clear

Cancel

Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100

1-300 of 300

<

>

User ID	Name
XXXXXX	PI, Name
YYYYYY	PI, Name

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

9

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 XXXXX PI, Name

Access is being granted to the following researchers:

*User ID

YYYYYY

Q

LastName, FirstName

+

1 of 1

<


>

View All

1-1 of 1

<

>

	Effective Date	Seq	Maintain Proposal	Details	View Awards	Status	
1	04/24/2025	0	Selected		All	Pending	+

Save

Notify

Add

Update/Display

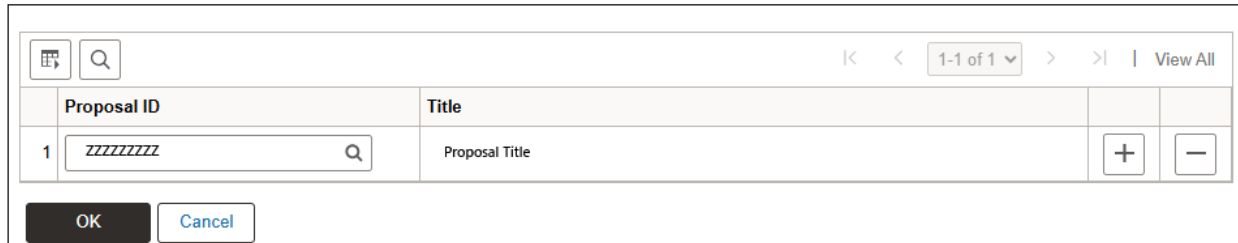
Include History

Correct History

10

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

Select the appropriate proposal or award 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.

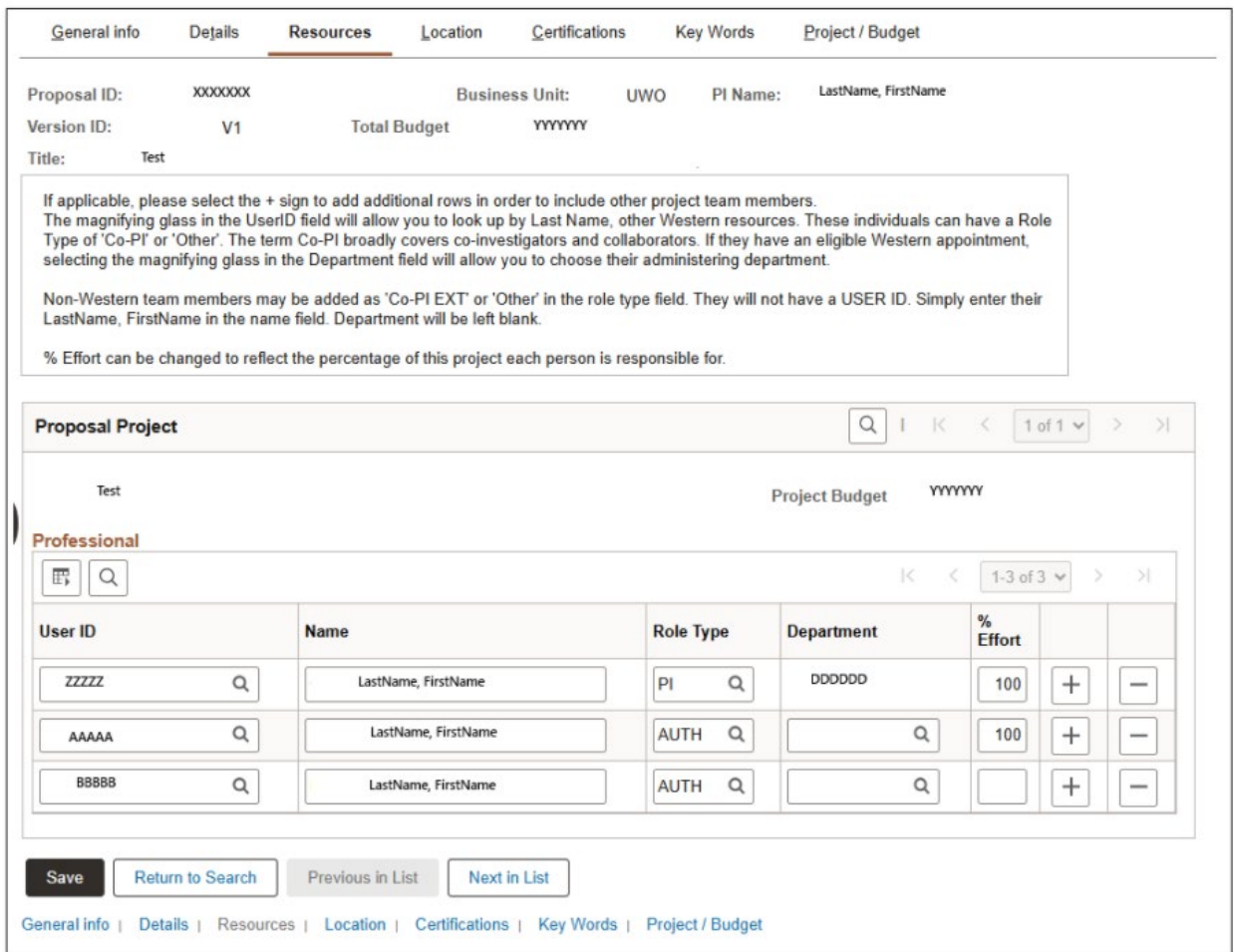


Proposal ID	Title
1 <input type="text" value="ZZZZZZ"/>	Proposal Title

OK Cancel

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.

For example, if a user is given access to Maintain Proposal for ALL, they will be listed in the **Proposal** on the resources tab as "Authorized".



General info Details **Resources** Location Certifications Key Words Project / Budget

Proposal ID: XXXXXXXX Business Unit: UWO PI Name: LastName, FirstName
Version ID: V1 Total Budget: YYYYYY
Title: Test

If applicable, please select the + sign to add additional rows in order to include other project team members. The magnifying glass in the UserID field will allow you to look up by Last Name, other Western resources. These individuals can have a Role Type of 'Co-PI' or 'Other'. The term Co-PI broadly covers co-investigators and collaborators. If they have an eligible Western appointment, selecting the magnifying glass in the Department field will allow you to choose their administering department.

Non-Western team members may be added as 'Co-PI EXT' or 'Other' in the role type field. They will not have a USER ID. Simply enter their LastName, FirstName in the name field. Department will be left blank.

% Effort can be changed to reflect the percentage of this project each person is responsible for.

Proposal Project

Test Project Budget YYYYYY

Professional

User ID	Name	Role Type	Department	% Effort		
<input type="text" value="ZZZZ"/>	<input type="text" value="LastName, FirstName"/>	PI	DDDDDD	100	+	-
<input type="text" value="AAAA"/>	<input type="text" value="LastName, FirstName"/>	AUTH	<input type="text"/>	100	+	-
<input type="text" value="BBBB"/>	<input type="text" value="LastName, FirstName"/>	AUTH	<input type="text"/>		+	-

Save Return to Search Previous in List Next in List

General info | Details | Resources | Location | Certifications | Key Words | Project / Budget

Basic Access Request

Any user with access to ROLA can initiate a "Request for Access to Grants Management" for another individual who has an existing Human Resources relationship with Western with an Employee ID.

The requester will be required to provide the new User's Employee ID and indicate the Department where the User holds an appointment.

They will also be asked to identify if the user is an eligible PI holding a faculty appointment at Western. Anyone else utilizing ROLA is defined as "Research Support" – Non-eligible research personnel.

ROLA
Research OnLine Administration
Proposals
Awards
Sponsors
Authorization and Access
Program to CPI Mapping
Professional Data
Job & Employment Data
User Profiles
Grants Access Inquiry
Researcher Grants Access Rqst
Grants Access Request
Acknowledge Access Request

Request for Access

Research Western
Request for Access to Grants Management
Before you can proceed with the request for access the recipient must have a valid Employee ID and a Corporate E-mail Address.
If you do not have a valid Employee ID please contact HR.
If you do not have a Corporate E-mail Address please contact ITS.

Please enter Employee ID: (This is required to authenticate your employee status and will not be displayed within Grants Management)
Please select a Business Unit: (This is required to authorize your request)
Please select a Department where Recipient will hold an appointment:

Recipient Type
☒ **PI** Holds a faculty appointment and is eligible to hold a research account at Western
☐ **Research Support** Non eligible research personnel [Eligibility policy](#)

Comments:
If you are requesting access for another user, an e-mail will be sent to their Corporate E-mail Address for them to acknowledge that this is a valid request. If you are submitting a request for yourself this step will not be required.
Once the request is acknowledged, your Faculty Security Officer will Authorize the request. Research Services will then Activate your access to Grants Management.

The individual will be sent an email to Acknowledge the Access Request and brought to this screen.

Research OnLine Administration	Grants Access Ackn	
Proposals		
Awards		
Authorization and Access		
Researcher Grants Access Rqst		
Acknowledge Access Request		
Extend Access by PI		
Profile Review		
Signatory/Administrator Audits		
Administration		

Business Unit UWO **Status** Active

Empl ID XXXXXX **LastName, FirstName** **abc@uwo.ca**

Access Role	RoleName	Role Description
<p>Request</p> <p>Requestor Name RequestorName xyz@uwo.ca</p> <p>Eff Date 04/26/2025 Date From 04/26/2025 To Department/Faculty YYYYYY <input type="radio"/> Accept <input type="radio"/> Reject</p> <p>Limit Amt Comments</p>		

Save **Return to Search** **Notify**

By clicking on the Accept radio Button and saving the screen, the Faculty Security Officer will be notified by email to continue the process.

The Faculty Security Officer will be required to Authorize Access Request before Activation by the Grants Security Officer in Western Research.

Authorize Access Request	
Authorize Access Rqst	
Business Unit UWO	Status Active
Employee Name PI Name	abc@uwo.ca
Access Role PI	Principle Investigator
<p>Request</p> <p>Requestor Name Requestee xyz@uwo.ca</p> <p>Eff Date 04/28/2025 Date From 04/28/2025 To Department/Faculty YYYYYY <input type="radio"/> Accept <input type="radio"/> Reject</p> <p>Limit Amt Comments</p>	
Save Return to Search Notify	Update/Display Include History

By clicking on the *Accept* radio Button and saving the screen, the Grants Security Officer in Western Research will be notified by email to complete the process and *Activate* the Role request.

All verifications through this process are completed electronically.

Pre-Hire Grant Access Process

Special access to ROLA can be granted to Principal Investigators at the Pre-Hire stage. Please contact Natalie Wu at 519-661-2111, ext. 81572, or nwu28@uwo.ca for assistance.

Initiation of this process should begin well in advance of the Sponsor Application Deadline.

Special Access to ROLA – Hospital Support Staff

Employees of the London Health Sciences Centre who do not have a Human Resources relationship with the University may be required to support Principal Investigators wishing to administer their grants at Western.

A process is in place to gain Special Access, including a Western USERID and password necessary to use ROLA.

The request must be initiated by the HR Administrative Officer in the Department. Please utilize [Ask HR](#) on the HR website.

The Relationship type is defined as:

Employee of Another Organization - Admin. Staff (ZZ520): These individuals are employees of another organization that has some form of operating agreement in place with the University. The individual is in an Administrative position or in a role that supports a faculty, department, or another organization. Due to the strong teaching and/or research relationship that these organizations have with the University, these individuals require access to University resources due to the type of work they are performing or the nature of the collaboration. This includes research support staff requiring specific 'ROLA' access.

Complete the form and submit as required. The process for activation is shown below.

