

## Research Western ROLA - Quick Guide

### When entering through the Funding Opportunities page

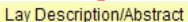




#### Enter a New Proposal (Complete New ROLA)

Select **New ROLA** next to the competition of interest on the RW Website or Funding Announcement email.

Enter User ID & Password.

- Indicate Proposal Type and select 

*You may alter much of the pre populated data that is relevant to the Proposal. Below are the required fields for submission of a proposal, however completing as much information as possible at this stage will ensure a faster transition from Proposal to Award and Account/Speedcode assignment.*

- On the General Info tab you are asked to complete the following:
  - Title **(required for save)**
  - 
  - If you are completing a Proposal for another individual, select the correct PI ID.
  - If you have more than one eligible appointment you will need to identify where the grant will be administered by clicking on the magnifying glass  and choosing the appropriate Department **(required for save)**.
  - Answer the question Is Western the Lead Institution? **(required for save)**
- On the Details tab:
  - Controlled Goods declaration, you must choose from the pick list **(required for save)**. Answer all declaration questions on this page
- On the Resources tab you may:
  - Indicate the PI's % effort toward the Proposal.
  - Add CO-PIs or CO-PIs External and include the % effort toward the Proposal.
  - % Effort - *What percentage of this project are you responsible for?*
- On the Location tab:
  - If the grant activity will take place other than in standard Western labs, select the affiliate or centre on the Location tab for this Proposal.
    - Locations outside of Western (e.g. McGill) will be listed as Western for the purpose of this form.
  - Multiple locations for this Proposal may be added by using the +- buttons
  - Total % of activity of all locations may not exceed 100%
- On the Certification tab:
  - Indicate Compliance/Certification requirements for this Proposal.
  - Complete the secondary table detail as appropriate.
- On the Keyword tab:
  - You must select at least one Keyword **(required for save)**. Type in a keyword and click on the  icon to initiate the search.
    - If the keyword you are looking for cannot be found, contact the ROLA Helpdesk for assistance.
  - Save  the Proposal at this stage and document the Proposal ID number for future use.
- On the Projects/Budgets tab:
  - Select .
  - Review the period dates, select [Proposal Budget](#) link and complete the budget. Save the budget and select Return to Proposal.  
*Note: you may need to turn off popup blocker.*
- This Proposal may be saved and updates added at a later time. Once you are satisfied that it is complete, locate the **Submit Proposal** on the General Info tab or in the menu. Submit the Proposal through the submit component. Note that only the PI may complete the submission of a Proposal.

Track the Approval process by selecting the **Approval Status Review** in the menu.

Note: when using the  icon you may wish to use 'Contains' rather than the default 'Begins with'.

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#### Maintain an existing Proposal

This function will allow a researcher to retrieve a previously saved Proposal within ROLA. Changes may be made to any Proposals which maintains a Draft Status.

Select **ROLA** from the Research Western Homepage. Click on the **MAINTAIN ROLA** Link below the ROLA Logo.

Enter User ID & Password.

- Select **Grants (ROLA II)** from the Menu.
- Select **Proposal / Maintain Proposal** from the Menu.
- Select **Find an Existing Value** and click .
  - You may also refine your search criteria at this point as appropriate
- A list of your Proposals will be listed.
- Select the Proposal to be viewed / maintained.
- Be sure to  the changes you make to the Proposal  
*Note that once a Proposal has been submitted, it cannot be modified.*

#### Submit a Proposal

These functions will allow a researcher to submit a completed Proposal for institutional approval.

Select **ROLA** from the Research Western Homepage. Click on the **MAINTAIN ROLA** Link below the ROLA Logo.

Enter User ID & Password.

- Select **Grants (ROLA II)** from the Menu.
- Select **Submit Proposal** from the Menu.
- Select **Find an Existing Value** and click .
  - You may also refine your search criteria at this point as appropriate
- A list of your Proposals will be listed.
- Select the Proposal to be submitted.
- Verify the information is correct and click


*Note that once a Proposal has been submitted, it cannot be modified.*

#### Print a Proposal

This function will allow a researcher to print a paper copy for reference.

Select **ROLA** from the Research Western Homepage. Click on the **MAINTAIN ROLA** Link below the ROLA Logo.

Enter User ID & Password.

- Select **Grants (ROLA II)** from the Menu.
- Select **Print Proposal Summary** from the Menu.
- Select **Find an Existing Value** and click .
  - You may also refine your search criteria at this point as appropriate
- A list of your Proposals will be listed.
- Select the Proposal to be printed.
- Initiate the Generate process by clicking
- Click the  button on this screen until the document name appears in the Generated Document area (this may take several minutes).
- View the PDF document by clicking on the View Icon 

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#### Profile Review


This function allows for the review and maintenance of data pertaining to a researcher's eligibility to hold a grant as well as relationships with sponsors and affiliates. All users within the system will have a Profile generated on activation in the system. This is personal and private information and no other end user will have access to your individual profile.

Select **ROLA** from the Research Western Homepage. Click on the **MAINTAIN ROLA** Link below the ROLA Logo.

Enter User ID & Password.

- Select **Grants (ROLA II)** from the Menu.
- Select **Sponsored Research** from the Menu.
- Select **Profile Review** from the Menu.

You may now...

- View PI Eligibility as calculated by ROLA
- View Appointments (driven by information in HR)
- View/Maintain Affiliations
- View/Maintain Sponsor PIN ID numbers (used for post award reporting)
- View Department Eligibility Status
- View Grants Policies
- View/Maintain user specific funding announcement distribution details. The types of funding announcement to be received by email may be maintained in this screen.
- Be sure to  the changes you make to your profile.

#### Extend Access by PI


This function allows for a PI to grant access Proposal or Award Information to other users. This will allow you to provide research support staff access to your granting world. This is personal and private information and no other end user will have access to your individual access profile.

Select **ROLA** from the Research Western Homepage. Click on the **MAINTAIN ROLA** Link below the ROLA Logo.



Enter User ID & Password.

- Select **Grants (ROLA II)** from the Menu.
- Select **Authorization & Access** from the Menu.
- Select **Extend Access by PI**

You may now...

- Add a new value to define your Extend Access Profile the first time by clicking 
- On your return to this function you will be allowed to View extended access that has been granted to your Proposals/Awards/Financial Information.
- Extend access to additional users as you see fit.



- To add a new user  click on the + sign
- Search for and choose a User ID
- Assign function you wish to extend - Maintain Proposal or View Awards
- You may choose to extend access to All Records, Selected Records, or remove access by choosing None.
- Be sure to  the changes you make to your access profile.