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

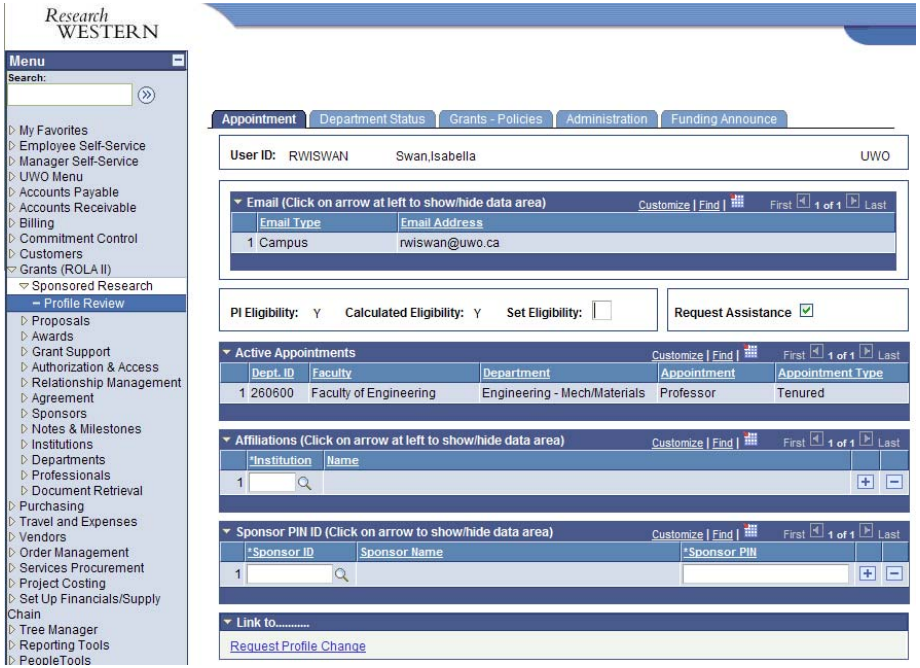
All users will have a *Profile Review* page available to view in **ROLA**

*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.



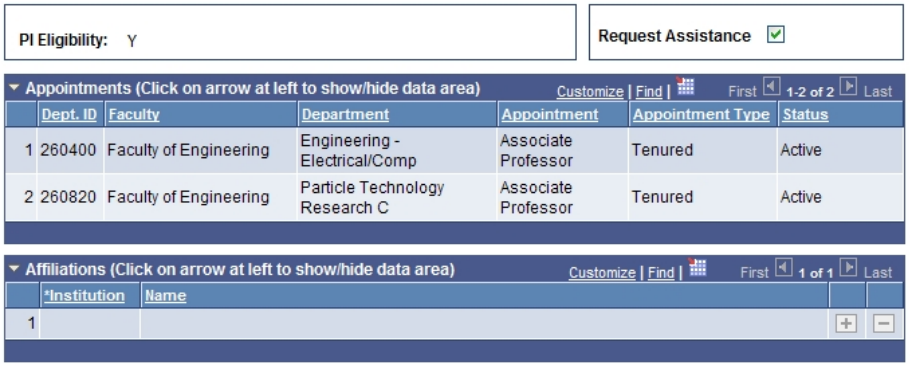
RD&S collects and maintains Sponsor PIN ID information, which is utilized in corporate financial reports to the Tri Councils (CIHR/NSERC/SSHRC).

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, 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.

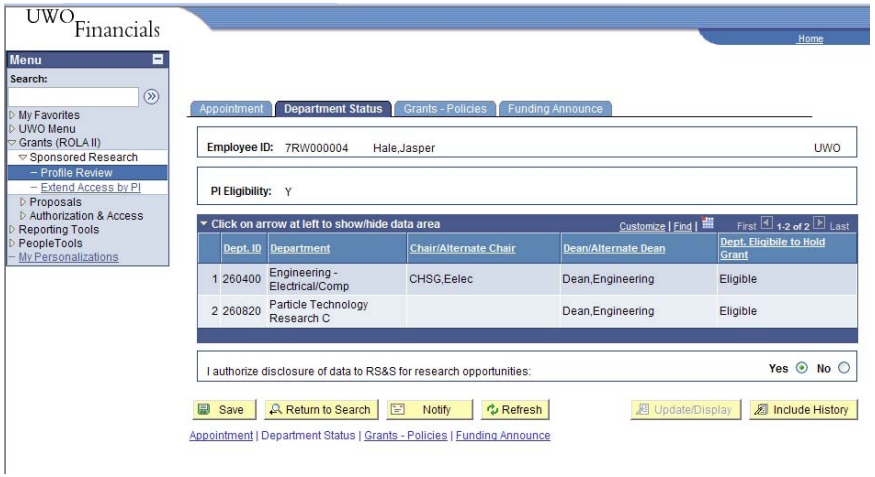


The *Department Status* Tab, displays details of your Faculty, Departmental appointments. This information is driven by Western's Human Resources, and as such details will not be available within ***ROLA*** until they have been completed by the Faculty/Department through to HR.

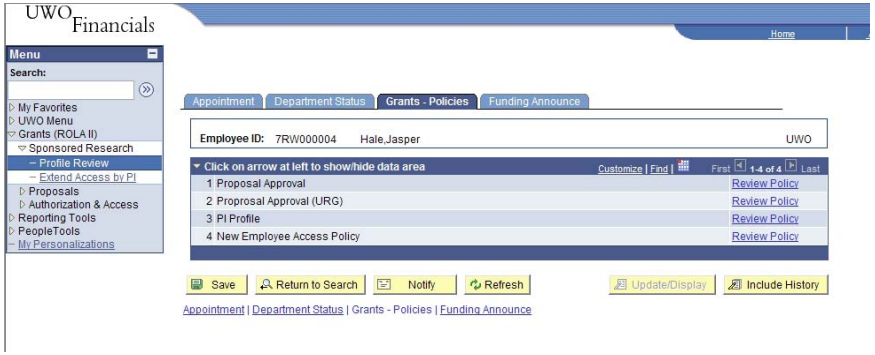
This screen will show the Faculty/Departmental affiliations you hold. The ***ROLA*** signatories for each affiliation are listed as well as Departmental eligibility to hold a grant at Western.

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.

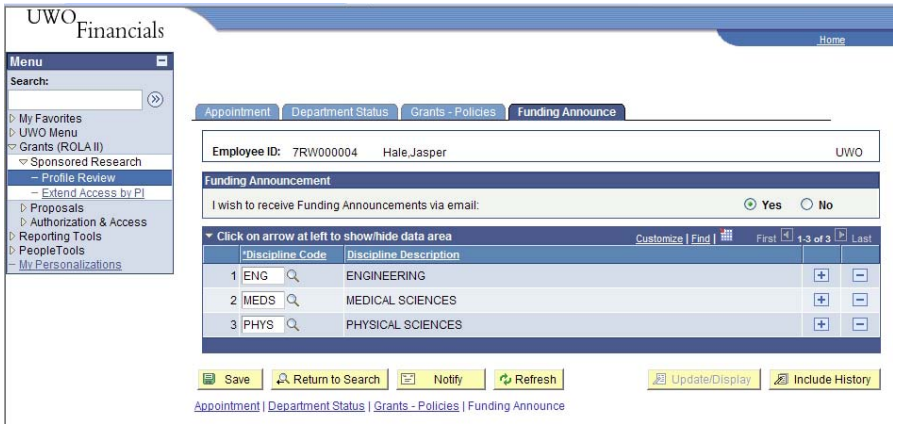


*Grants - Policies* allows you to review the Policies associated with each of the main ***ROLA*** functions.



*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.

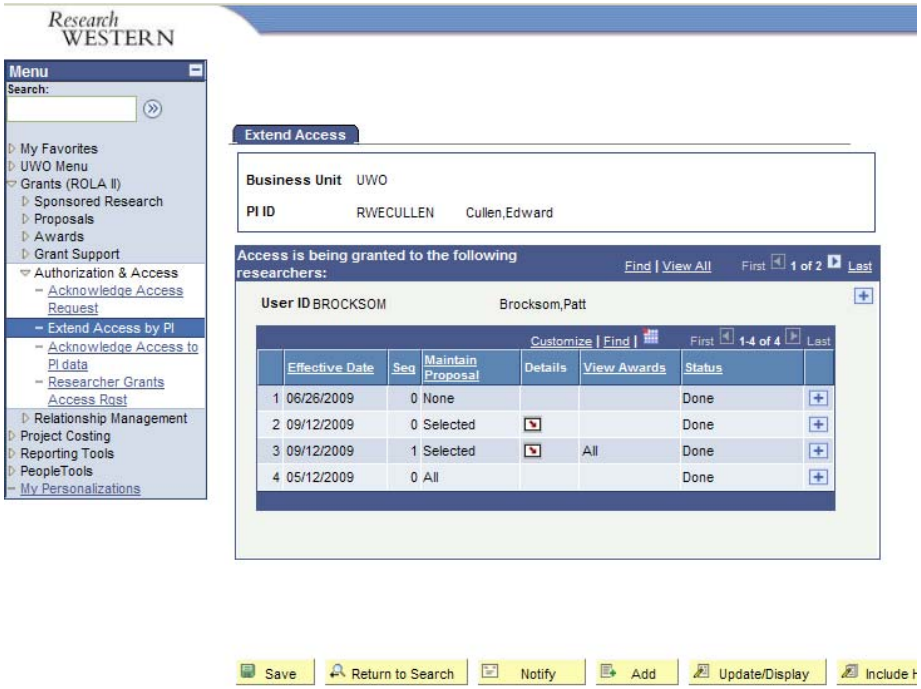


EXTEND ACCESS by PI

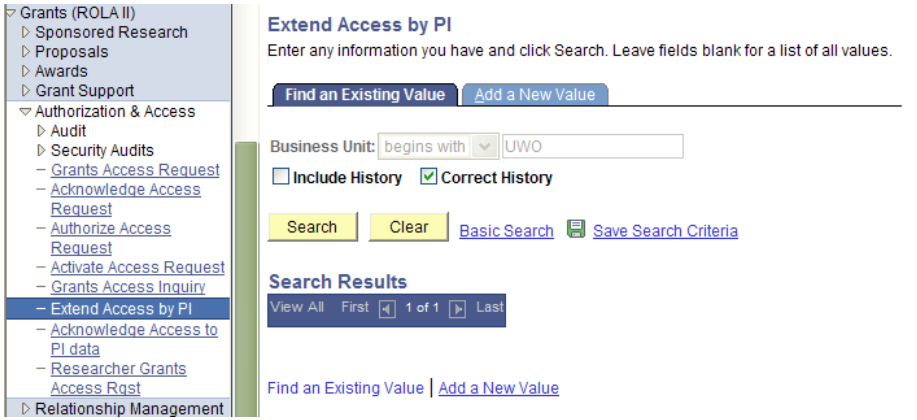
Extend Access by PI in ***ROLA*** is found within *Authorization & Access* in the ***ROLA*** menu. You will only be able to view your own information within this function.

*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.



Choose Extend Access by PI from the menu

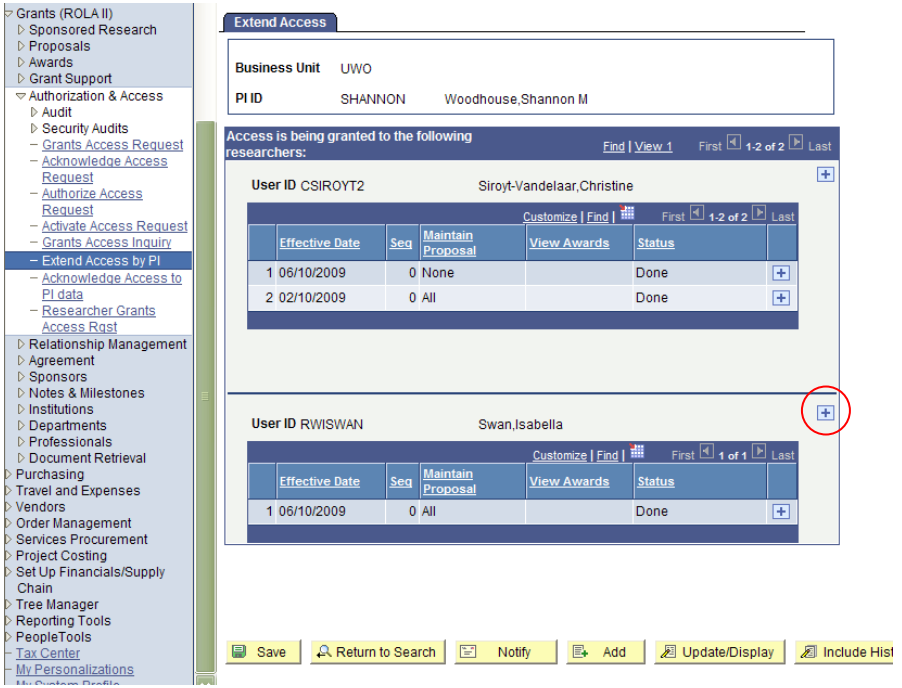



If this is the first person you are extending access to, you will need to add a new value to establish a record for your information.

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

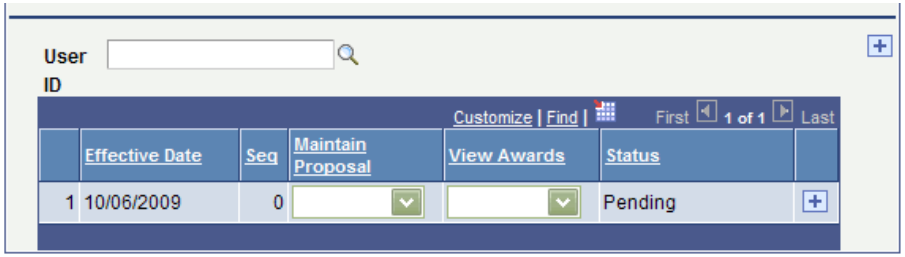
Once you are in the Extend Access panel you will be able to view and maintain the rows for those individuals you have already extended access to and add additional users to your record.

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



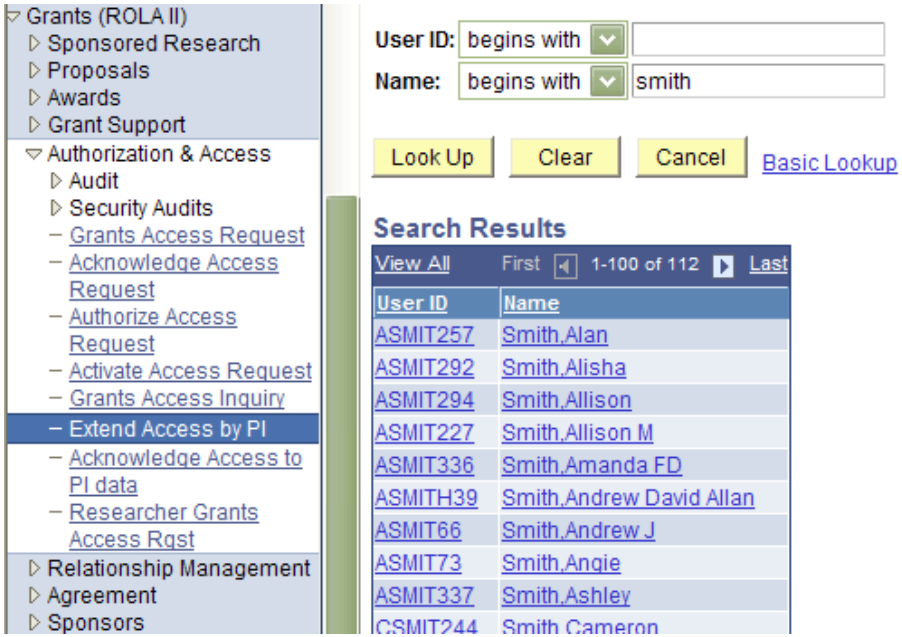

You may search for and grant authorized access to your information within the following functions for any current user in HR.

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.



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

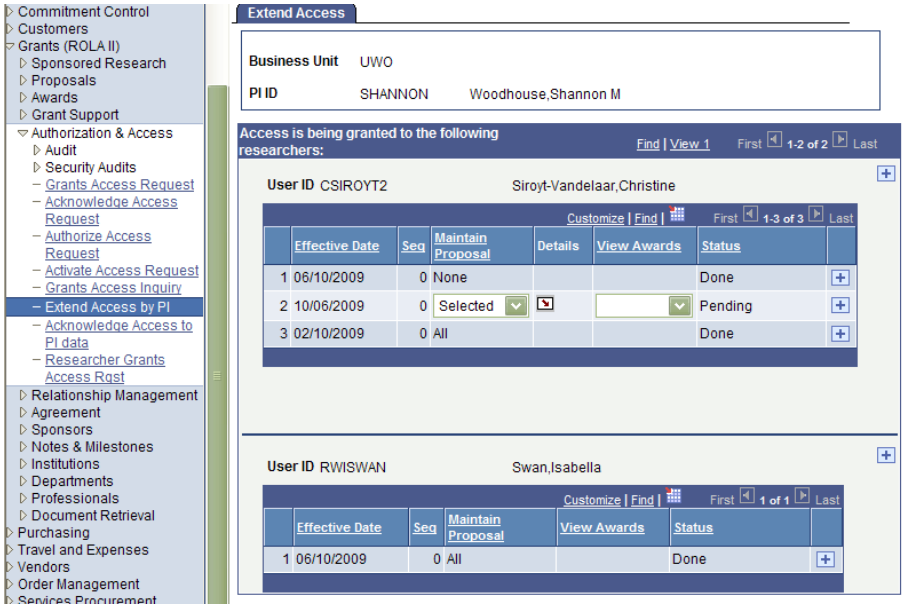
**The functions available are:**

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

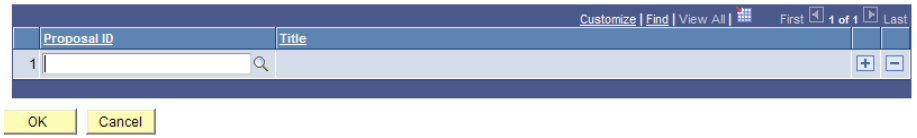
**The levels of access available are:**

| | |
|---|---|
| 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 |

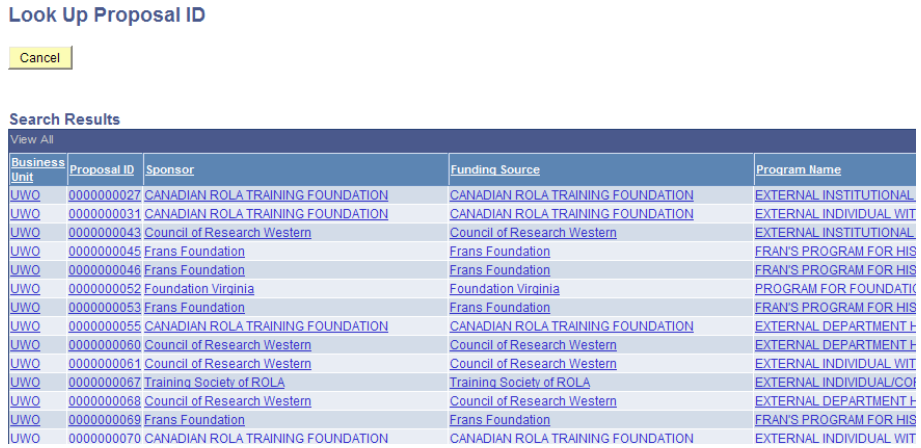
If you wish to extend access to a selected proposal or award you will indicate the details of that choice by clicking on the details icon that appears to the left of the dropdown box.



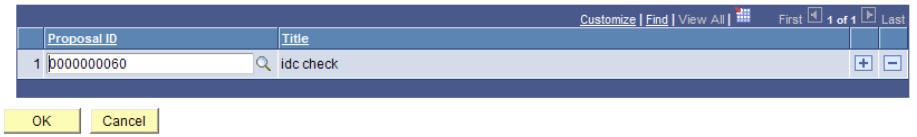
By clicking on the search icon you will be able to choose from any of your proposals or awards.




Select the appropriate proposal or award

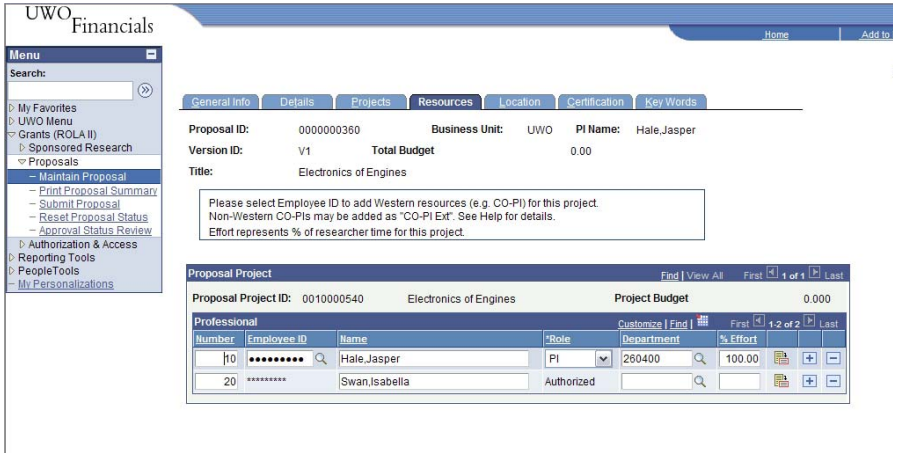



and choose OK. You will be taken back to the Extend Access screen where you should save the changes you've made at this time.



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”.




Click here to continue on to view the ***Gain/Maintain Access to ROLA*** Training Documentation.