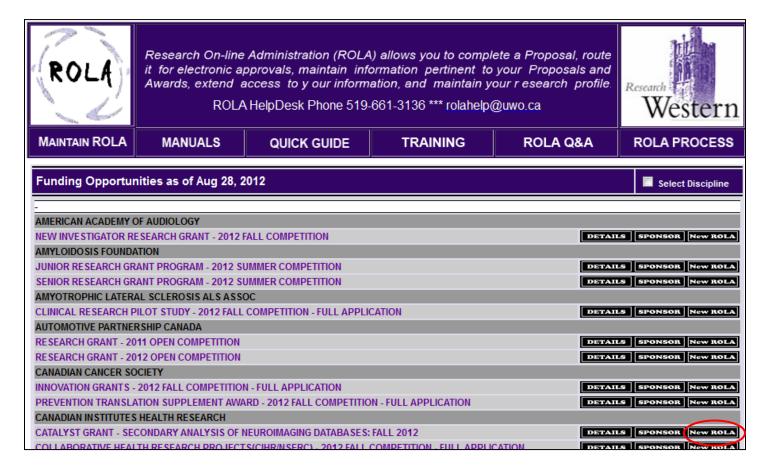
Completing a ROLA Proposal

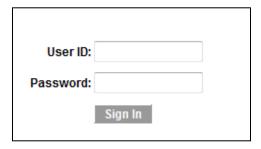
The following guide outlines instructions for completing a ROLA Proposal through the Funding Opportunities page. This page is regularly updated by Research Development & Services with upcoming funding deadlines. If you are planning to submit an application and do not see the competition posted, please contact the ROLA Help Desk at x83136.



Enter a NEW ROLA Proposal

On the funding opportunity page, select the "New ROLA" button next to the specific competition of interest.

This takes you to the Log-in page: Enter UWO USER ID and password. Select "Sign In".



Indicate Proposal Type and Select the ADD button.

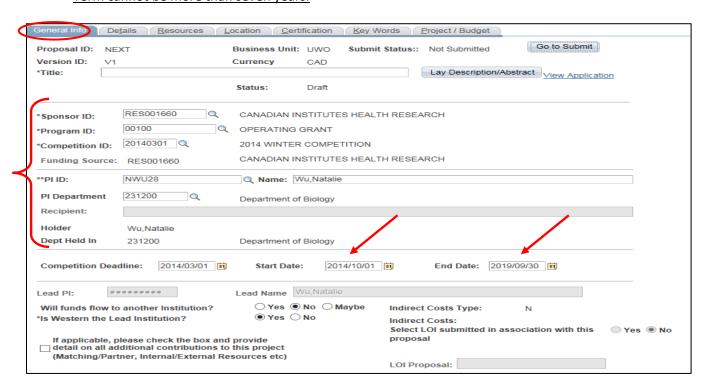
NEW: The default has been removed and a proposal type must be selected.

Add New Proposal



This takes you to **the General Info** tab of the ROLA Proposal, where the following information will be pre-populated for you:

- 1. Sponsor/Program/Competition information
- 2. PI ID and Name
- 3. Department (Please note: if you have <u>more than one</u> eligible appointment, you will have to select your primary appointment for administering the project)
- 4. Anticipated Start Date/End Date (unless the competition does not specify this). Feel free to edit these dates. Term cannot be more than seven years.



Please complete the following information based on the information in your application to the funding agency/sponsor.

- 1. Enter the title of your project/application
- 2. Enter the Lay Description/Abstract by select the Lay Description/Abstract button. This opens up a large text field where you can copy and paste relevant information.

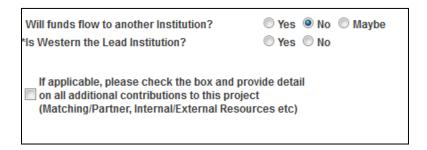
**Please note: currently researchers from the Faculty of Engineering, the Faculty of Science and the Faculty of Social Science must also use this field to provide faculty-specific information regarding your project. Please consult your Faculty research office for more information.



3. If you have more than one eligible appointment, you can select/change your department by clicking on the magnifying glass next to the PI Department field. Select your department from the list. If it is not available, please contact ROLA Help at x83136.



4. Toggle your answer to the following questions:



- a. Will funds flow to another institution?
- b. Is Western the Lead Institution on this project? If you toggle "YES", move to the next question.

If you toggle "NO", a pop up box will appear where you can select the Lead Institution.

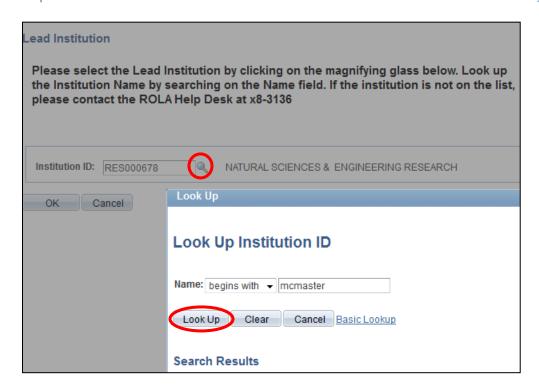
Click on the magnifying class.

Type in the name of the institution.

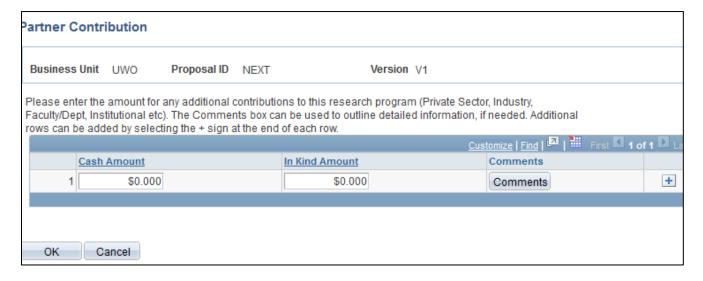
Select "Look Up".

Choose from the Search Results presented.

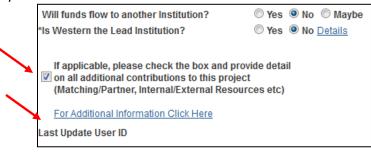
Click "OK"



c. Are there additional contributions to this project? Matching funds, partner funding, private sector or Industry funding, department or faculty commitments? If **yes**, check the box and a new window will open for you to provide cash and in-kind amounts. <u>Please use the comments box for details regarding</u> these contributions. Select "OK" will close the window.



A hot link will appear that will take you back to the information:



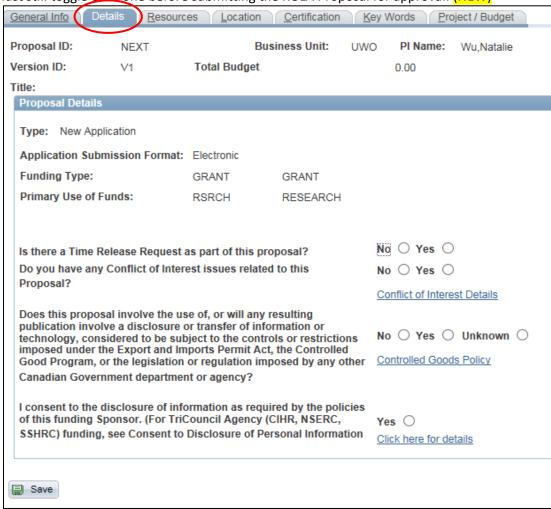
Scroll back up to the top of the page and find the Details Tab.

Click on the **DETAILS TAB**

Toggle your answers to the following questions – hotlinks open in a new window to provide information:

- a) Will you be requesting time release as part of this project?
- b) Do you have any Conflict of Interest Issues?
- c) Does your project involve Controlled Goods?
- d) The Consent to Disclosure toggle

Please note: These toggles are only accessible by the PI. If you are entering information on behalf of the PI, these toggles will be grey and the PI must still toggle each one before submitting the ROLA Proposal for approval. (NEW)



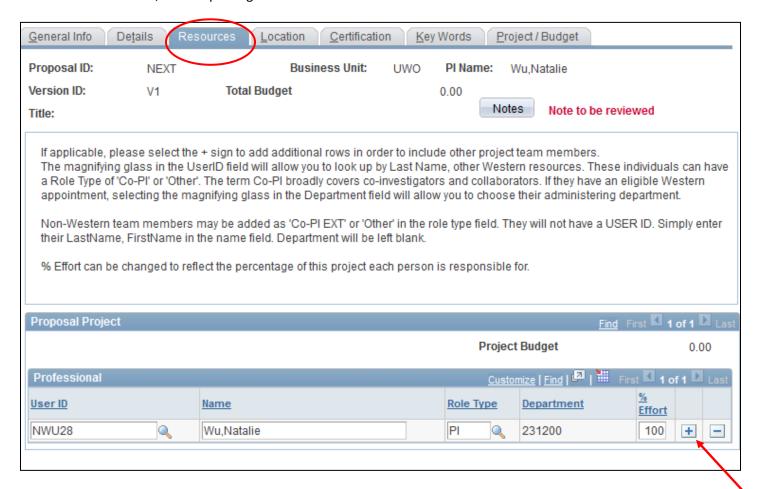
^{**}Please note that the Time Release Request may default to NO. If NO is checked there will be a reminder message when submitting the proposal. Click ok to close the window and proceed.

Scroll back up to the top of the page and find the Resources Tab.

Click on the RESOURCES TAB

Skip to the next tab if you do NOT have any additional team members to add.

To add new individuals, use the plus sign to add additional rows.



For eligible Western employees, you will be able to look up the USER ID by selecting the magnifying glass. The Look up pop up will allow you to search by LAST NAME. Role Type can be CO-PI or OTHER. Select the Department by using the magnifying glass look-up. Adjust % effort.



For non-Western members, you can simply enter the Last Name, First Name in the Name Field. Select ROLE Type as OTH or CO-PI EXT. Leave the USER ID and Department fields blank.

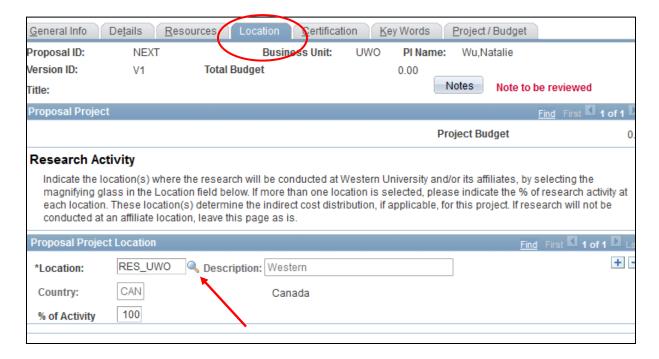
Scroll back to the top of the page and find the Location Tab

Click on the LOCATION TAB.

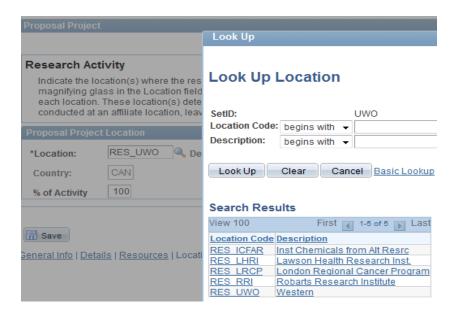
Skip to the next tab if you will **NOT** be conducting research at one of the following:

ICFAR

Lawson Health Research Institute London Regional Cancer Program Robarts Research Institute.



To change or add a Location of Research, click on the magnifying glass next to the Location field. Select your location from the pop up. This is required for members of ICFAR and Robarts Researchers.

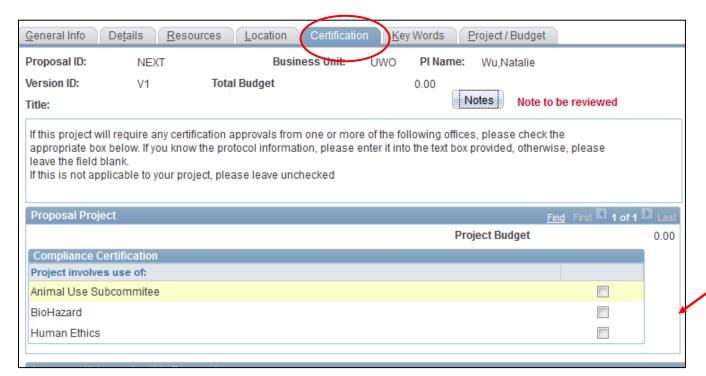


Scroll back up to the top and find the Certification Tab.

Click on the **CERTIFICATION TAB**

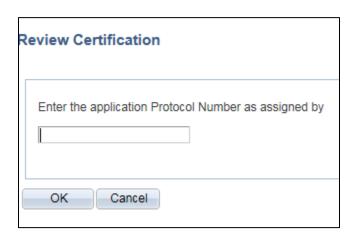
Skip to the next tab if you will **NOT** need to obtain any Certification approvals:

If you will need to obtain certification approvals, please check the appropriate box. <u>Please ensure certification</u> requirements on Sponsor Application are matched on ROLA proposal.



A new window will open.

If you already know the approved protocol number, please enter in the text box provided. If not, please leave this page **BLANK**.



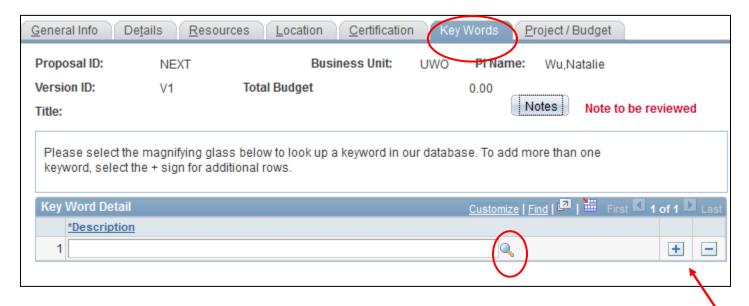
Simply click "OK" to close the window and return back to the Certification Tab.

Scroll back up to the top of the page and find the KeyWords Tab.

Click on the KEYWORDS TAB

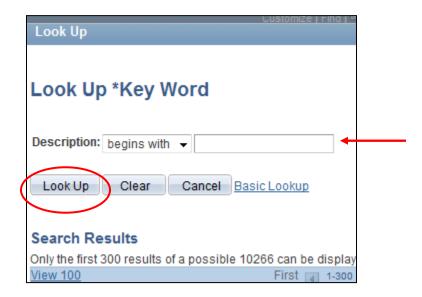
You must enter at least one keyword. The system maintains a large keyword database with over 10,000 keywords.

To find a keyword, select the magnifying glass.



A look up box will appear:

- a. Type in your key word in the Description field
- b. Select the "Look up" button.
- c. Select your key word from the search results.
- d. To add additional keywords for your project, select the + sign and repeat.

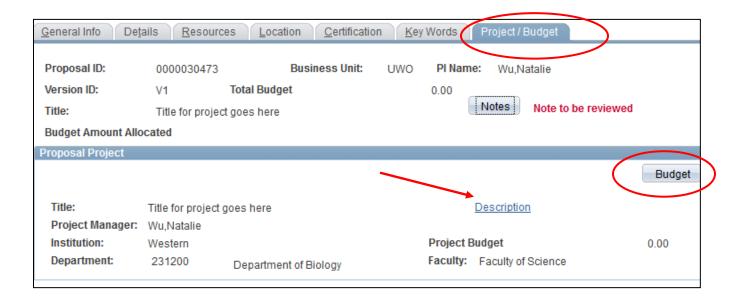


Once you have selected your keyword, click on the **SAVE** button (bottom left of the page).

Scroll back up to the top of the page and find the Project/Budget tab.

Click on the "PROJECT/BUDGET" TAB.

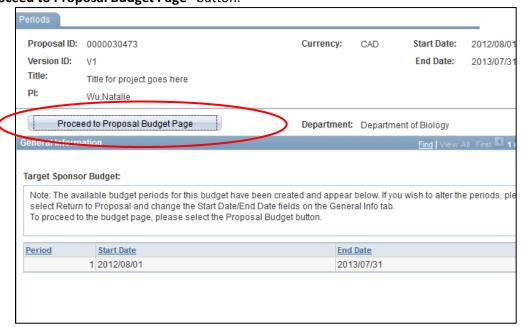
Any budget information or detail can be entered under the Description hot link. This is a free form (optional) text field.



Click on the "Budget" button.

This page confirms the budget periods. Any changes can only be made by going back to the General Info tab and adjusting the Start Date and/or End Dates.

Click on the "Proceed to Proposal Budget Page" button.

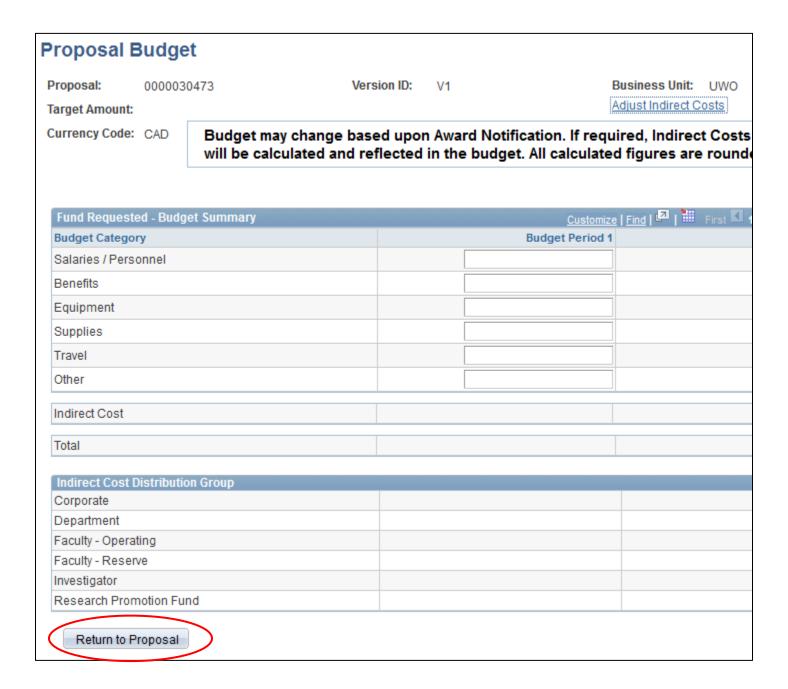


Enter your budget information.

If Indirect Costs need to be adjusted, please contact the ROLA Help Desk at x83136.

When complete, select **Save**.

Then Return to Proposal.



The Proposal is now complete.

You can either leave it in draft or proceed to Submit the Proposal for electronic approvals.

To Submit the Proposal, select the "General Info" tab and toggle the button "GO TO SUBMIT".