How to use the ERSO Research Portal

A guide for researchers and signing authorities

University of Windsor
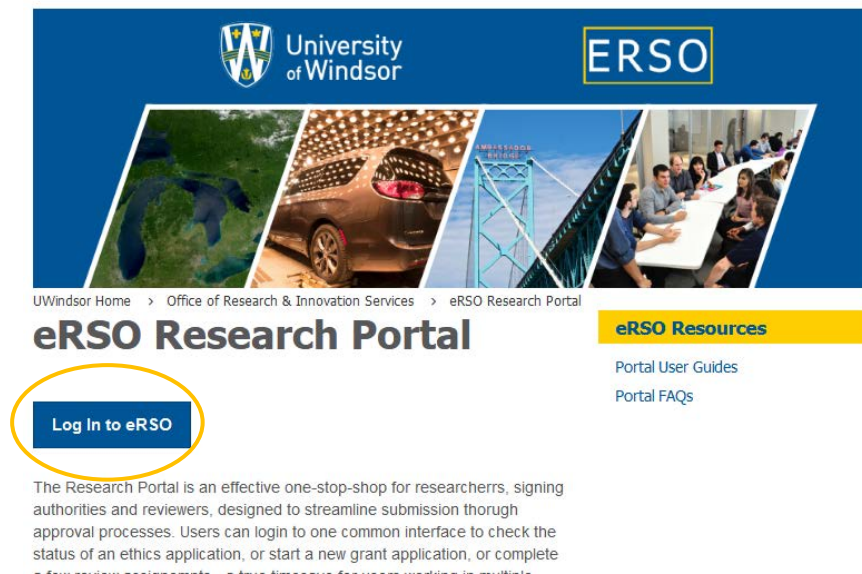
Office of Research and Innovation Services

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1. Logging in to the ERSO Research Portal

Log into your ERSO Research Portal account by going to uwindsor.ca/ERSO and clicking Log In to ERSO.

For convenience and security, your UWin ID single sign-on is used as your login credentials, and you will be required to complete two-factor authentication the first time you log in. Remember to keep your UWin ID safe and do not share your password! Anyone you share your information with will be able to access all your past and current grant applications.
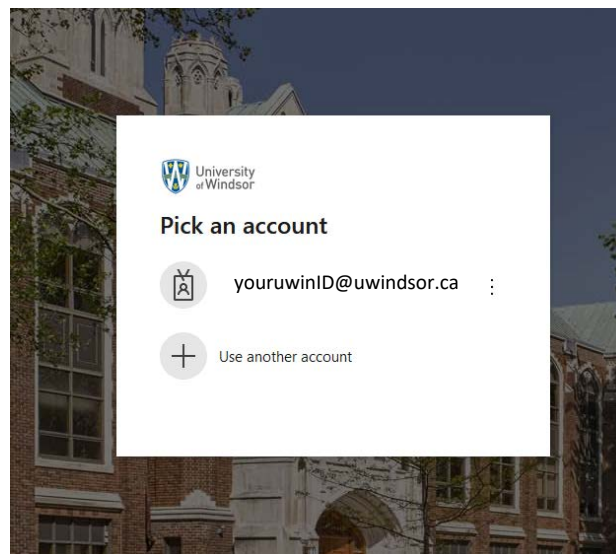
Once you log in, on the Home Page you will see two drop-down sections: Principal Investigator and Project Team Member. These tabs are roles that show your active and past research projects where you are the Principal Investigator or a team member. These drop-down sections may be closed when you first log in. Click the arrow at the far right to expand or collapse. If you have other roles, such as a departmental Signing Authority, this role will also appear as a section.

2. Finding your past ERSO files

All your past ERSO files, as either a Principal Investigator or a Project Team Member can be found in your ERSO home page, whether pending, awarded, completed, or not awarded. You will be able to find these projects under Applications: Post Review. Click the link to view a list of your past projects.

3. When to create an ERSO File

3.1. Applying for an external grant

You should always create a file in ERSO at the **start of preparing** an application for external funding. The submission of this file notifies ORIS that you are planning to apply for external funding, regardless of the agency to which you intend to apply. ORIS will then easily be able to assist you in preparing your grant application and ensure that appropriate approvals are in place prior to submission to the funding agency.

3.2. Establishing a research contract

An ERSO file is also **required** when entering into a research contract with an external partner. A research contract may consist of a formal research contract or a purchase order for a one-time set of research activities. Should you anticipate receiving several purchase orders over the coming few years, you may wish to consider setting up a lab account (see Section 3.3 and policy). It is best to submit an ERSO file during your negotiations, as this advises ORIS that you are planning to enter into a contract, and triggers the support of the ORIS Contracts Manager to ensure that your contract complies with University of Windsor policies, and is signed off by the appropriate parties. No research grant account can be set up for contract work until you have completed your ERSO file submission, so **completing your submission early will prevent delays** in accessing your funds, processing invoices, et cetera. Please make sure you include contact information for your external partner and upload any draft documents.

3.3. Establishing a lab account

A lab-based research grant account (see policy) has the purpose of supporting internal and external use of a researcher's controlled equipment or services, paid for by a fee-for-service basis. This type of account may be preferred for research groups that conduct multiple, small-scale fee-for-service activities that require quick turn-around time.

If you would like to set up a lab account, you are required to have your Deans approval and to submit an ERSO file. This will advise ORIS of all the necessary approvals, details and trigger setting up the lab account. It is strongly advised to contact ORIS prior to requesting a lab account be established to ensure that you are aware of the processes and policies involved with these accounts. If you do not, ORIS will contact you after your request to discuss.

To set up a lab account, you will be required to upload a 1-page outline of your request to the Attachments tab. This outline will include the nature of the items that are being anticipated to be charged to the account, and a short summary of the administrative process that will be followed for the quotation of research and/or service being provided as well as the process for the generation of invoicing. If you are unsure about how to prepare this outline, please contact your Research Coordinator.

3.4. Applying for internal funding

Application forms are typically available on the ERSO portal 6-8 weeks ahead of the submission deadline for each of these internal grants. Paper forms are being phased out for these programs, and by summer 2022 the electronic ERSO forms will be **the only way to apply** for these internal programs.

4. Starting a new file

To start a new ERSO file, click on APPLY NEW at the top right of your ERSO home page. A list of available forms will load. Select the correct form for the grant application you are planning to submit. Note that in most cases you will use the **ORIS External Funding Checklist** form, which replaces the old ORIS Information form and Checklist.

Application Name	Description	Status
ORIS External Funding Checklist	Complete this form a minimum of five days in advance of any application for external grant funding, including research contracts. The earlier you complete this form, the more support ORIS can give your application!	Open
UWindsor Research Grants for Women	UWindsor internal grant application - Research Grants for Women	Open
UWindsor Explore Grant	UWindsor internal grant application - UW-SE Explore (SSHRC Faculty only)	Open
UWindsor Exchange Grant (Travel)	UWindsor internal grant application for academic travel	Open
UWindsor Exchange Grant (Knowledge Mobilization)	This program is available for SSHRC faculty only.	Open
UWindsor Undergraduate Research Experience Grant	UWindsor internal grant application for funds to employ undergraduate students in research roles.	Open
UWindsor Tri-Success Grant Program	UWindsor internal grant application for unsuccessful Tri-Agency grant applicants. This funding provides support for future Tri-Agency applications.	Open
UWindsor General Research Fund	Under certain circumstances, NSERC and SSHRC will transfer residual funds from expired grants to the University of Windsor's General Research Fund (GRF), subsequent to the terminal year (i.e. one-year extension) that is granted to award holders. In accordance with Tri-Council regulations, the university may use these funds for the "broad purpose of enhancing the quality of research in the natural sciences and engineering, or in the social sciences and humanities". Primary NSERC and SSHRC grant holders, whose grants have expired with funds remaining, may formally apply to the institutional GRF, which is administered by the Office of Research and Innovation Services, in order to complete the research project originally funded.	Open
UWindsor Faculty or Departmental Award	If you have received an award from your Faculty or a UWindsor department besides ORIS, please submit this form to request an account be opened. Includes: Research Support Fund, all CTL awards, and any awards adjudicated directly by your Faculty.	Open
Schulich-UWindsor Opportunities for Research Program (SWORP)	Supervisors must complete this form on behalf of their student researcher.	Open

To apply for an internal funding opportunity, select the appropriate form from the list. Not that not all forms will be available all the time – forms for internal grant applications will only be available while those programs are accepting submissions.

4.1. Finding specific information about your file

When you start a new file, you will see eight tabs across the top of the form. The first three tabs (Project Info, Project Team Info, and Project Sponsor Info) will be identical for each different type of ERSO file.

The fourth tab will have the name of the form you are submitting and will contain specific information about that form. Click on this tab and select the **Application Guidelines** subtab to find specific information about the form you are completing. **It is important to read these guidelines to prevent delays in processing!**

4.2.   Project info tab

After you have read the Application Guidelines, start your file on the Project Team Info tab.

1. Enter the **Project Title**.
2. Enter the **Start Date** in YYYY/MM/DD format or select the appropriate date using the calendar tool. This is the date on which you expect your grant/contract to begin.
3. Enter the **End Date** in YYYY/MM/DD format or select the appropriate date using the calendar tool. This is the date on which you expect your grant/contract to end. **Do not include any anticipated extensions!**
4. Add **Keywords** by selecting from the drop-down menu. You can search this list by typing your desired keyword at the top of the list.
    a. If the keywords you want are not in the list, please contact ERSO@uwindsor.ca. To maintain data integrity, only ORIS has edit access to the keyword list. They may suggest a similar keyword. If no relevant keyword exists, they will add yours to the list.

If you already have an REB clearance, or a certificate from the Research Safety Committee or the Animal Care Committee, you can request that it be linked to this application by clicking Search under the **Related Certifications** section and selecting from a list of your past certificates and clearances. ORIS will request confirmation from the relevant committee. If you know that you will require a new certificate or clearance, click Add New to enter the type of clearance required. ORIS will ensure that you are connected to the right committee to obtain your clearance. If you are not sure how to answer this question, go to the more detailed question on the fourth tab of the application to add details so that ORIS can assist in identifying your clearance needs.

Note: This step does not constitute your application for a certificate, it only notifies ORIS that a certification may be required for this grant.

For additional guidance on managing your certs and clearances, see Section 7 below.

Note: You will be prompted to save if you close your application before submission, but the form does not autosave as you go along. It is wise to click the yellow Save button at the top left corner as you complete each tab, in case you lose internet connection, or your browser closes unexpectedly.

4.3. Project Team Info tab

The Project Team Info tab is where you will list all the researchers who are involved in your project. If you initiated the ERSO submission, you will be listed here as the Principal Investigator (PI). If you are working with an external PI or are a team member starting the submission on behalf of your team and the PI, click on Change PI. A window will pop up allowing you to search for a colleague to list as PI. If your PI is not listed, please contact ERSO@uwindsor.ca.

Note: if you change the PI, make sure to add yourself as a Project Team Member in the section below, or you will be unable to access the ERSO file later!

You can also add additional team members by clicking on Add New under the Other Project Member Info section. You will be able to search for your colleagues in the pop-up window. If you cannot find a team member in the list, please enter their information in the Comments box in the Principal Investigator section and ORIS will add them to your file during the approvals process.

When you have found your colleague, click the yellow Select button to add them to your project. You will then see them listed under the Other Project Member Info section. By clicking the Edit button, you can change your colleague's role in the project. You can also click the Delete button if you have added the wrong person.

Please be aware that anyone you add as a Project Team Member will be able to access the ERSO submission before it is complete, view it after submission, and be able to access funds in your grant account, should the grant be awarded! Do not add student researchers as Project Team Members.

4.4. Project Sponsor tab

The Project Sponsor Info tab captures key project funding data, like funding source and requested cash, in-kind and overhead amounts. This tab will help ORIS and Research Finance set up your grant account quickly and correctly. Click on the yellow Add New button to add your funding source to the submission.

A pop up will appear allowing you to search for the right Agency. Click on the yellow Agency button to search. A new pop up with a search menu will appear, and you can search for the Agency. When you have found it, click the yellow Select button. You will come back to the Sponsor Info page and will be able to select the Program to which you are submitting from the drop-down menu. Add the Competition Date (the Program's submission deadline or if rolling deadline, the date you intend to submit to the agency), and the start and end dates for this sponsor. Make sure that your currency type is set correctly.

Note: You will need to enter start and end dates again on the Sponsor tab, but this allows you to have different dates for different sponsors. For example, if a Sponsor's funding will not begin until Year 2 of the project, you can set the start date differently from the project itself.
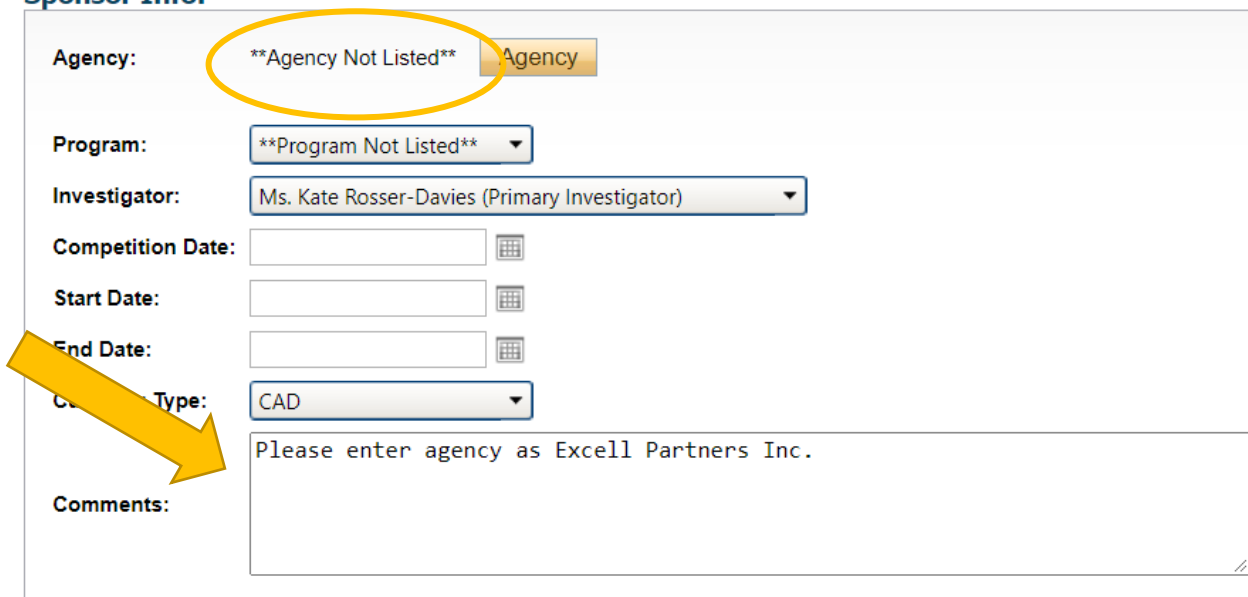
If you cannot find the agency you want in the drop-down listing, select **Agency Not Listed** from the top of the list, and enter the details in the Comments box. ORIS will add the agency to the list for you

after submission. If your agency is listed, but the right program is not, select the default program (which varies by agency) and enter the correct program details in the comment box.

If you are applying to a UWindsor internal grant program, select the Sponsor Agency University of Windsor – Internal [INT], and pick the program you are applying to from the list.

The investigator drop-down lists all project team members and will default to the PI, if you do not know how the project funds will be disbursed between project team members yet, please leave all funds under the PI.

Next, you must also indicate how much funding you are requesting. Start by clicking the yellow GENERATE button to generate a disbursement table. You should find that a row has appeared for each fiscal year of your project.

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead	Awarded Cash	Awarded In-Kind	Awarded Overhead
2020	2021/03/18	2022/03/31	0.00	0.00	0.00	0.00	0.00	0.00
2021	2022/04/01	2023/03/31	0.00	0.00	0.00	0.00	0.00	0.00
2022	2023/04/01	2024/03/31	0.00	0.00	0.00	0.00	0.00	0.00
2023	2024/04/01	2025/03/31	0.00	0.00	0.00	0.00	0.00	0.00
2024	2025/04/01	2025/08/07	0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00

*NOTE: The disbursement table defaults to the **University's fiscal year**, which begins April 1, and NOT the specific agency's fiscal year (which may not be known to us) or grant cycle. This means that if your grant will start on a different date, you will have two lines for the first year. One is for the stub of the fiscal year in which your grant starts, and the next is for the full fiscal year starting the next April 1. You won't be able to change this!*

Add the amount of funding you are requesting on your application in each year. If you are not sure how installments will break down in each year, put all the funding on the first line – ORIS will ensure the disbursement table is correctly populated after you have submitted.

If you are receiving non-cash support from a partner, list the approximate value under Requested In-Kind.

If your project will include overhead, ensure that it is added **separately from the total cash**. So, if you are receiving $60,000 from a research contract, but $12,000 of that will be overhead, enter $48,000 as Requested Cash and $12,000 as Requested Overhead. If you have requested an overhead reduction/exemption you **must** upload documentation that it has been approved on the Attachments tab.

You will need a separate entry on the sponsor tab for each source of funding you are applying for. For example, if you are applying to NSERC Alliance, you will need to list both NSERC and the industrial partner as sponsors. If you are receiving a funding contribution from the University of Windsor, such as a match from your Dean, you will also need to add that information here on the sponsor tab. You will also need to upload a letter of support or some other documentation to the Attachments tab confirming the support, whether from your department, another grant, your Faculty, the VPRI or some other UWindsor source.

*Note: Most agencies are listed by their full name! For example, you will find NSERC listed as **Natural Sciences and Engineering Research Council** and SSHRC as **Social Sciences and Humanities Research Council.***

4.5. Additional information

The fourth tab will contain questions that are specific to the file type you are submitting, and the text you see on the tab will be the same as the name of the form. If you are submitting the **ORIS External Funding Checklist**, these questions deal with issues such as additional budget details, intellectual property, legal documentation, and space and equipment provisions (similar to the questions on the old ORIS Information Sheet and Checklist). If you are applying to an internal UWindsor program, this tab is where you will describe your project and give details that will be used by the adjudication committee in determining whether or not to fund your application.

In all cases, there is also a Declaration sub-tab. This is where you will confirm that you agree to abide by all UWindsor research policies and regulations. You must agree to this declaration in order for your project to be approved by ORIS and your research grant account to be opened.

The ORIS External Funding Checklist

When you are applying for external funds, the form type you will submit is called the ORIS External Funding Checklist, which replaces the paper ORIS Information Sheet. You will see ORIS External Funding Checklist on the fourth tab of the file you are submitting.

| Project Info | Project Team Info | Project Sponsor Info | ORIS External Funding Checklist | Attachments | Approvals | Logs |
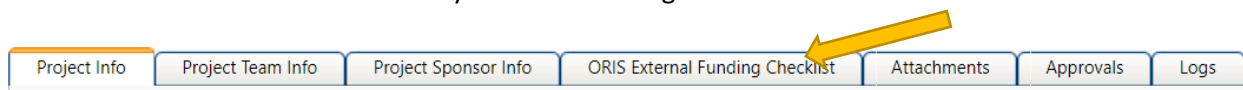
This tab has subtabs for you to submit important information that will help ORIS process your file quickly and accurately, and help you access funds as soon as they are awarded. They are:

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1. Application guidelines and instructions
   - Here you will find a reminder of the most important info you will need to complete your submission fully. A lot of the information is the same as what is in this manual!
2. Certifications
   - You may have added an existing certification or clearance on the Project Info tab or clicked Add New to list that you'll need to obtain one. To assist us in confirming your existing certificate or clearance, connect you to the appropriate board, or support you if you are not sure what certifications or clearances you'll need, please answer all questions – they are required, and you will not be able to submit without completing them.
3. Essential Budget Details and Additional Keywords
   - These questions will help us ensure that we have all the documentation required for all your sources of funding. If you are receiving funds from an existing account, either an operating account or a grant account, please enter the account number in question 3.4 so that we can make sure your funds are transferred in a timely manner!
   - You can also add any keywords that you were not able to find in the drop-down menu on the Project Info tab.
4. Legal Documentation
   - All legal documentation associated with your project **must** be reviewed by the ORIS Contracts Manager, including NDAs, licensing agreements, research contracts, MOUs, etc. Please answer these questions to ensure that legal support is available.
   - You should also upload any existing copies of legal documents to the Attachments tab!
5. IP Disclosure
   - If you know from the outset that your project will include intellectual property that needs to be protected, please give us the details on this tab so that our Technology Transfer team can support you!
6. Equipment and Facilities
   - Your project may involve the purchase of new equipment, whether large or small. Large equipment may need space allocated to it in order for it to function, so it is important you let us know, and provide documentation to show that your Dean has approved the plan and has space available for you. If your new equipment is larger than a desktop computer, you should advise us of it.
7. Declaration
   - Complete this tab to confirm that everything in your application is correct to the best of your knowledge.

Internal Grant Applications

ERSO provides electronic submission forms for ORIS-administered grants, such as the Exchange travel grant, or the Undergraduate Research Experience grant. If you are submitting an application to one of these programs, the name of the program will appear on the fourth tab. The questions will be different from the ORIS External Funding Checklist and will be used to adjudicate your application. Make sure to check the Attachments tab to see if there are any templates to download and complete!

4.6. Attachments tab

Your file may have a wide variety of attachments to upload. Common attachments will include:

- The final copy of your application materials that will be submitted to the agency OR a draft if you are in the review process with your Research Coordinator
- Your project budget
- Letters of support from your Dean or the VPRI that confirm cash or in-kind contributions
- MOUs between you and collaborators or partners

To upload a document, click on Add Attachment. A pop up will appear asking you to enter some information about your attachment. Complete the fields and click Add Attachment to upload.

For internal grant program applications, there may be required documentation in the Attachments tab that you must download and complete before uploading, such as a budget template. Download the template by clicking on the document name.

Complete the attachment and upload by clicking the Add Attachment button. You will see a list of attachments you have uploaded, and you will be able to view them after uploading.

5. Submitting your ERSO file

When you are happy with all the information in your ERSO file, you are ready to submit. Click on the yellow submit button.

*Note: A team member can initiate and finish the application, but **only the Principal Investigator** can submit it to ORIS.*

You and your Project Team Members will receive a confirmation email outlining the next steps.

6. What happens after submission

Once you have submitted your file, it will follow a standard chain of approvals before it is received by ORIS. Your department (AAU) head (where applicable) will receive a notification asking them to review the file. They can approve it or return it to you to ask for more information. You will receive an email notifying you of their decision. Once they have approved, your Dean will receive a similar notification, and has the same options to approve or request changes.

After your Department/AAU Head and Dean have approved, your application will be reviewed by ORIS. We will check to make sure that you have:

- Entered the correct dates, and titles
- Included necessary attachments

- Correctly identified all sources of funding
- Validate other information for completeness and accuracy

We will also:

- Add additional keywords as needed, including keywords that assist us in identifying and reporting on research trends
- Verify any clearances or certifications that you have attached, or help you connect with the offices from which you must obtain a certification or clearance
- Escalate any requests for legal document review or IP support

Following this validation, ORIS will officially assign your file to a Research Coordinator. They will also review your file and may request changes. You will get an email each time your file is reviewed! Once signing authorities are satisfied, the approval of the Executive Director of ORIS will be requested. If approved, you will receive a final notification and assigned an ERSO file number. **No grant accounts will be opened, nor any funds disbursed without this approval.**

If your file includes legal documents, such as a contract, NDA, or IP agreement, ORIS will ensure it is appropriately reviewed and executed on behalf of the University. Please upload your legal documents to the attachments tab. If you need assistance with any legal documents, please contact Vesna Kaps, contracts manager at vesna@uwindsor.ca.

Note: individual researchers DO NOT have the authority to sign on behalf of the University! ORIS will ensure that the appropriate signatures are obtained, but you are responsible for ensuring that ORIS has received copies of your contracts and other legal documents in a timely manner. Incorrect signatures will lead to delays in accessing your funding.

AT THIS STAGE, YOU ARE STILL RESPONSIBLE FOR ENSURING THAT ALL PAPERWORK AND DOCUMENTATION ARE SUBMITTED TO THE AGENCY IN A TIMELY MANNER!

When you receive your Notice of Decision, please ensure that you send it to your Research Coordinator by email so that a request can be submitted to open your grant account. **Assume your agency has not sent us a copy of the NOD!** We cannot submit a grant account request without an NOD. Please send unsuccessful NODs as well so that the file can be marked as not awarded and closed in ERSO.

6.1. Revising your ERSO file

If at any point in the approvals process a signing authority returns your file with a request for more information, their comments should be included in the email notification you receive. However, they can also be accessed by opening the file and selecting the Logs tab to review recent activity and comments. Once your file has been approved by ORIS, you will no longer be able to make changes, but your Research Coordinator can edit on your behalf.

When you have addressed the comments, you will be able to resubmit your application, along with any comments you wish to add. It will be routed through the signing authorities again.

Note: As part of the phased roll out of the ERSO Research Portal, Event forms will soon be available which will allow you to do things like submit reports or attach extra documentation.

6.2. Viewing your past ERSO files

If you would like to review files that you have submitted, simply return to your home page, and click on **Applications: Under Review**, either in the Principal Investigator or Project Team Member roles.

Role: Principal Investigator	
Applications: Drafts	(5)
Applications: Requiring Attention	(0)
Applications: Under Review	(2)
Applications: Post-Review	(0)
Applications: Withdrawn	(2)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)
Role: Project Team Member	
Applications: Drafts	(1)
Applications: Requiring Attention*	(1)
Applications: Under Review	(0)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)

If a signing authority wants you to revisit something you have submitted, you will see it under **Applications: Requiring Attention***. Remember that anything that is highlighted in red are files that you should look at!

When your file has been approved by all signing authorities, it will be moved to **Applications: Post-Review**.

7. Research Ethics, Animal Care, and Research Safety

Does your project involve human participants, animals, biohazardous substances, or other elements that are a risk to researcher and participant safety? You will need to make sure you have received clearance or a certification from the right committee. You will not be able to access your grant funds until you've cleared your project!

Note: ERSO refers to all ethics, animal care, biosafety, radiation, and environmental certificates and clearances as "Certifications".

7.1. I already have a certification or a clearance

Sometimes you may be applying for funding that will support a project that has already been cleared. Reduce the time it takes to access your funds by letting us know ahead of time! On the Project Info tab, you will see a section called "Related Certifications".

Related Certifications

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review commitee

Add New	Search	
		Certification Category
No records to display.		

To link an existing certification to your file, click "Search". A list of your existing certs will appear, and you can select the appropriate one. Click on [Select] next to the certification you want to link.

Certification List

Close

Options	File #	Certification Category	Title	Status	Expiry Date
[Select]	38560	Human Ethics	Test Application: Research Portal End User Training	Active	

Close

You will now see your certification linked to your ERSO file. ORIS will request confirmation from the relevant board that the certification or clearance that you've linked is the correct one to be applied to the ERSO file.

If you are not able to find a certification or clearance that should appear in your list, please contact ERSO@uwindsor.ca.

7.2.   I need to apply for a certification or a clearance

For all Animal Care and Research Safety (biosafety, radiation, and environmental impact) applications, you can apply within ERSO to obtain your clearance. To find these forms, click Apply New from your home page, and scroll to the Animal Care Committee and Research Safety sections, and select the right form. Please read over the descriptions carefully to ensure you are completing the correct form!

Click the form name to start your application.

Animal Care Committee

Application Name	Description	Status
Animal Utilization Project Proposal (AUPP) for research based protocols	All research and/or teaching projects conducted at the University of Windsor with live non-human vertebrate animals must be covered by a corresponding Animal Utilization Project Proposal (AUPP) which is approved by the Animal Care Committee (ACC) prior to acquisition of any animals for the project. Approval of an AUPP indicates that the ACC is satisfied that humane practices and proper animal care standards will be used, in accord with the requirements of the Canadian Council on Animal Care (CCAC) and the Ontario Animals for Research Act. Any changes in experimental procedures must be reported to the ACC by submitting a Request to Revise.	Open
Animal Utilization Project Proposal (AUPP) for teaching-based protocols	All research and/or teaching projects conducted at the University of Windsor with live non-human vertebrate animals must be covered by a corresponding Animal Utilization Project Proposal (AUPP) which is approved by the Animal Care Committee (ACC) prior to acquisition of any animals for the project. Approval of an AUPP indicates that the ACC is satisfied that humane practices and proper animal care standards will be used, in accord with the requirements of the Canadian Council on Animal Care (CCAC) and the Ontario Animals for Research Act. Any changes in experimental procedures must be reported to the ACC by submitting a Request to Revise.	Open

Research Safety

Application Name	Description	Status
Radioisotope Permit Application	All researchers who are planning to use Radioactive Materials in buildings operated by the University of Windsor are required to apply and obtain an approved Internal Radioisotope Permit.	Open
Laser Registration Form	The University of Windsor's Laser Safety Program is available at: https://www.uwindsor.ca /chemical-control-centre/314/laser-safety This site contains the text of the University of Windsor's Laser Safety Program, reference guides, contact information, safety information, and other laser safety related information.	Open
Application for an X-Ray Safety Certificate		Open

For confidentiality reasons, Research Ethics Board applications are not available on ERSO, though you will be able to view a list of your past REB clearances. To apply for an REB clearance, please visit uwindsor.ca/reb and follow the instructions outlined. Once your clearance has been approved, you will be able to view it in your list, though you will not be able to access the full file.

8. Signing Authorities

If you are a Department Head, a Dean, or the Director of an institute, you will also be designated as a signing authority for your AAU. On the old ORIS Information Sheet and Checklist, this meant that you had to sign the form for researchers in your AAU to finalize their applications and/or obtain funding. ERSO helps to automate this system!

8.1. How to tell if you are a signing authority

If you have been designated as a signing authority, you will see an additional section in your Home Page, below the Principal Investigator and Project Team Member drop down menus. If you should be a signing authority, but you are not, please contact ERSO@uwindsor.ca. If you wish to delegate your authority, please see the section below, called Delegating your Signing Authority.

Role: Faculty Signing Authority	
Applications: New*	(1)
Applications: Pending Requested Info	(0)
Applications: Under Review	(0)

8.2. How to review a new ERSO file that has been submitted

When **Applications: New*** is highlighted in red under your Role: Signing Authority drop-down, you have new applications to review from researchers in your department. Click on Applications: New* to see a list.

Note: You will also receive an email each time a file in ERSO is ready for your review!

	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
				All	
Review / Latest Workflow	Ref No : 10697	TEST 2 Research Grants for Women - Nicole	Dr. Nicole Noel (OFFICE OF THE VICE PRESIDENT -- RESEARCH AND INNOVATION\OFFICE OF RESEARCH SERVICES)	Research Grants for Women (Awards\Awards)	**Project Status:** Pending **Workflow Status:** Faculty Signing Authority Review

To open and review the file, click the yellow Review button. You will be able to see the entire file and read over all of the information and attachments that the Project Team has included.

In the top left corner, you will see a yellow button that says Approval Process. Click this button to either approve the file or return it to the Project Team Members for more information or changes.

Application Ref No: 10697 **Project Title:** TEST 2 Research Grants for Women - Nicole **Project Work Flow State:** Faculty Signing Authority Review

| Approval Process | Close | Print | Export to Word | Export to PDF |

| Project Info | Project Team Info | Project Sponsor Info | Research Grants for Women | Attachments | Approvals | Logs |

The Work Flow Action window will open. This is where you can enter any comments or feedback.

You should not approve files unless you can attest to the following:

- The applicant is eligible for funding by virtue of his/her employment contract in accordance with University of Windsor policy and meets the requirements of the Sponsor.
- You are aware of proposed activities, and confirm that space, basic facilities, and resources stated in Tab 4 for carrying out the research are available.
- You approve any commitments from your units and confirm that the applicant has the necessary time and facilities to carry out the research.

Select the right action from the four options in the first section. They are:

APPROVE: Confirms your approval and authorizes the team to move forward with the ERSO file and accessing the funding.

REQUEST INFORMATION: Returns the file to the team. Use this if you believe information is incorrect, out of date, or states something that you are unable to authorize (see the attestation above).

FORWARD TO NEXT SIGNING AUTHORITY: Forwards the file to the next one-up **without your approval.** This option should be used only in rare circumstances.

INCORRECT DEPARTMENT: If the Principal Investigator holds a cross-appointment, you may not be the right pERSOn to approve the file. If so, select this option to send it back to them so that it can be re-routed.

Enter comments about the application, and click the yellow Submit button.

8.3.   Delegating your signing authority

If you wish to delegate your signing authority to an Associate Dean, or if you will be away from your office for a significant amount of time, you can delegate your signing authority by contacting ERSO@uwindsor.ca. Please note that it may take up to 2 days to process changes! If you are going away on vacation or will otherwise be absent from your office, **please ensure you have delegated your signing authority before you leave.**

If you are away for an extended period and your signing authority has not been delegated, it may cause delays in researchers accessing their funding.