



### **Research Unit Liaison Meeting**

**December 4, 2007** 

3:00 – 4:30 pm

### eResearch Agenda

- eResearch Proposal Management System (eRPM) Project Status
- eRPM Workflow
- Task 6: Identify contacts for:
  - PAN/PAC email notification
  - Proposal preparation & review
- Task 7: Identify rough headcount of training candidates for leader-led training
- Next steps & tasks

### eResearch eRPM – Project Status

#### System Design & Development

Nearing completion

#### Testing

- System Performance Testing
  - Currently underway
- User Testing
  - December 2007 January 2008

#### Limited Availability

- February April 2008
  - Pilot with 20-25 proposals from variety of units
- Training
  - Support limited availability users
  - Training for full availability will start during the limited availability period

### Full Availability

Projected for May 2008

### eResearch Proposal Process



DRDA

DRDA reviews & approves proposal.

Proposal submitted to sponsor by DRDA or Project Team



Sponsor turns down proposal.

Sponsor

Sponsor approves proposal.



Unit reviewers (Department roll-up & reviewers/approvers) are calculated by the system using the information completed on PAF.

The system sends email notifications when it is a units turn to review/ approve the PAF.



PIs & Research Administrators collaborate on PAF & Admin Shell

#### PAF & Administrative Shell

#### Contains information about:

- Personnel
- Cost sharing
- Space
- Other Commitments
- Subproject/grants Administrative Home



**DRDA Processes Award** working with FINOPS & Contracts





## eResearch Proposal Process – Managing Changes



#### DRDA

DRDA reviews & approves proposal.

Proposal submitted to sponsor by DRDA or Project Team



Sponsor approves proposal.



Unit reviewers (Department roll-up & reviewers/approvers) are calculated by the system using the information completed on PAF.

The system sends email notifications when it is a units turn to review/ approve the PAF.

#### Managing PAF/Proposal Changes

- Project team can make changes.
- Reviewer can request/make changes.
- All changes are logged.
- If a change is made after approval, party that already approved is notified.
- Project team is notified any time a change is made.



DRDA Processes Award working with FINOPS & Contracts



# Research Administrator

Pls & Research Administrators collaborate on PAF & Admin Shell

#### Contains information about:

- Personnel
- Cost sharing
- Space
- Other Commitments
- Subproject/grants
- Administrative Home





- When a PAN/PAC is awarded, an email notification is sent to following people identified on the PAF:
  - UM Principal Investigator(s)
  - Sponsor Principal Investigator (when applicable)
  - Participating Investigators With Effort
  - Administrative Personnel
- Your task: For each Dept ID, identify individuals or email groups that should receive PAN/PAC email notification.
  - Note: The system prevents duplicate email notifications from being sent to individuals, but this does not include individuals that are part of an email group.

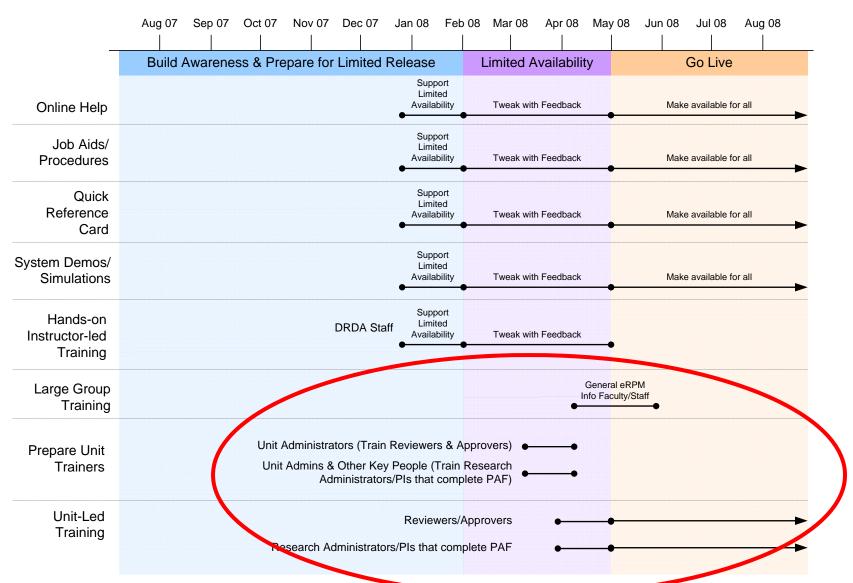


### eResearch Task 6 - Proposal Prep & Review Contacts

- Your task: For each Dept ID, identify contacts to facilitate proposal preparation & review.
  - Parties to contact for questions related to proposal preparation & review.
  - Will be publically listed.
  - Will eventually replace the information listed in the Blue Pages.



### eResearch High-level eRPM Training Approach



### eResearch eRPM Leader-led Training Courses

#### Course 1

- Audience: PAF completers (Research Administrators & some Principal Investigators)
- Includes how to: Login, understand home page basics, complete PAF, complete Grants.gov 424 forms when applicable, track proposal routing process, make & submit changes

#### Course 2

- Audience: Reviewers & Reviewers that sign PAF
- Includes how to: Login, understand home page basics, review PAF & proposal documents, make changes or request changes, approve PAF

#### • Course 3: Both 1 & 2

### eResearch Task 7 – Rough Number of Trainees

- Your task: Identify rough headcount of how many people from your unit will need:
  - Course 1 (PAF completers)
  - Course 2 (Reviewers)
  - Course 3: Both 1 & 2

### eResearch Next Steps

- Complete your tasks
  - Task 6 Identify PAN/PAC email notification contacts & proposal preparation & review contacts
    - You will receive your spreadsheet via email
    - Due: Before holiday break
  - Task 7: Provide rough headcount of candidates for leader-led training courses
    - Due: Before holiday break
- Reminder eRPM baseline survey is being sent out this week. Please help encourage your investigators & research administrative staff to complete.

### eResearch Future Meeting Topics

- January 15, 2008
  - Time: 3 4:30 pm
  - Location: Atkins Room, School of Information North
  - Tentative Topics:
    - Home page basics
    - PAF demonstration
    - Limited release information
    - Preparing units for May 2008 eRPM system release
      - Sharing information with units
      - Training information