

# eResearch **M**

## **Research Unit Liaison Meeting**

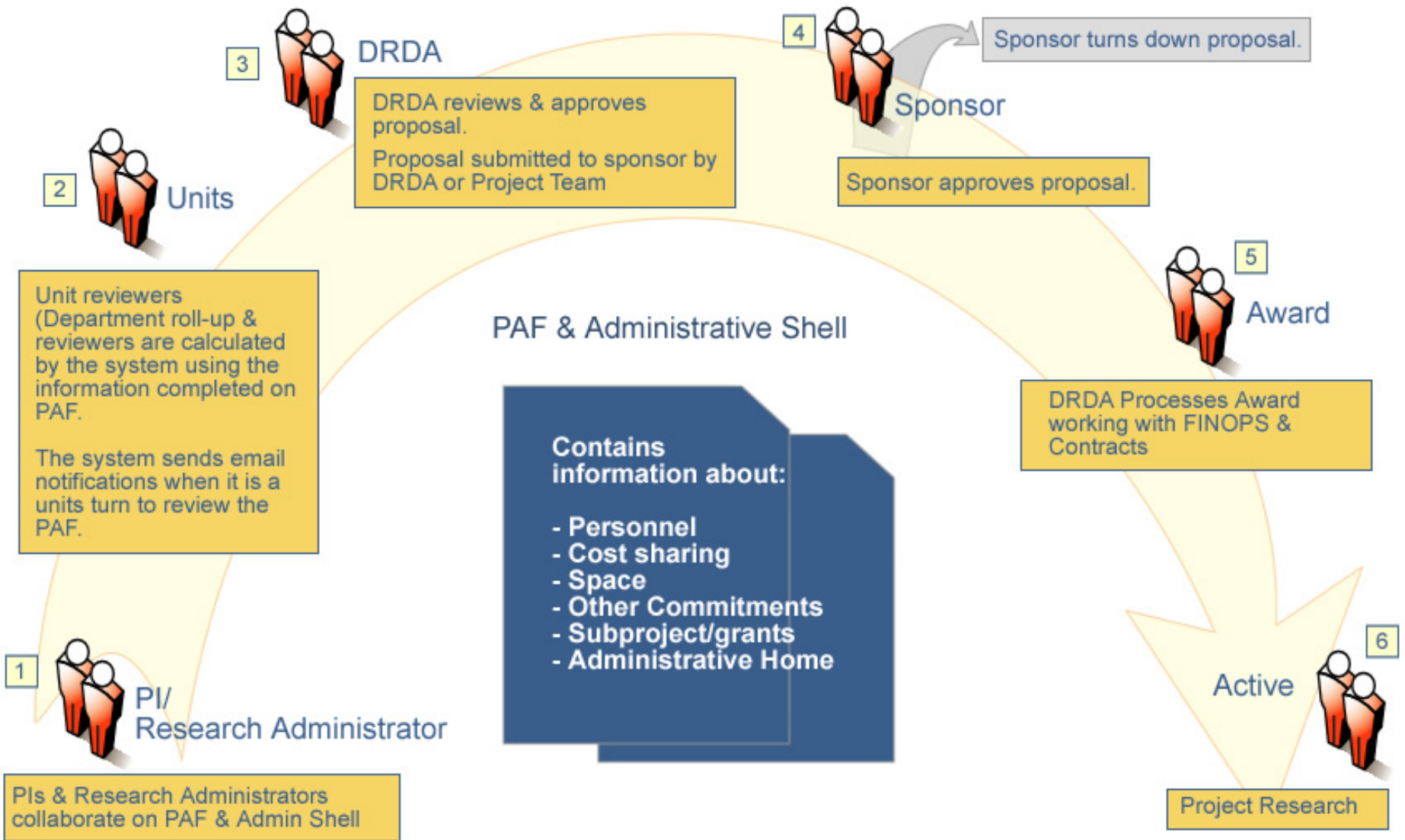
**April 1, 2008**

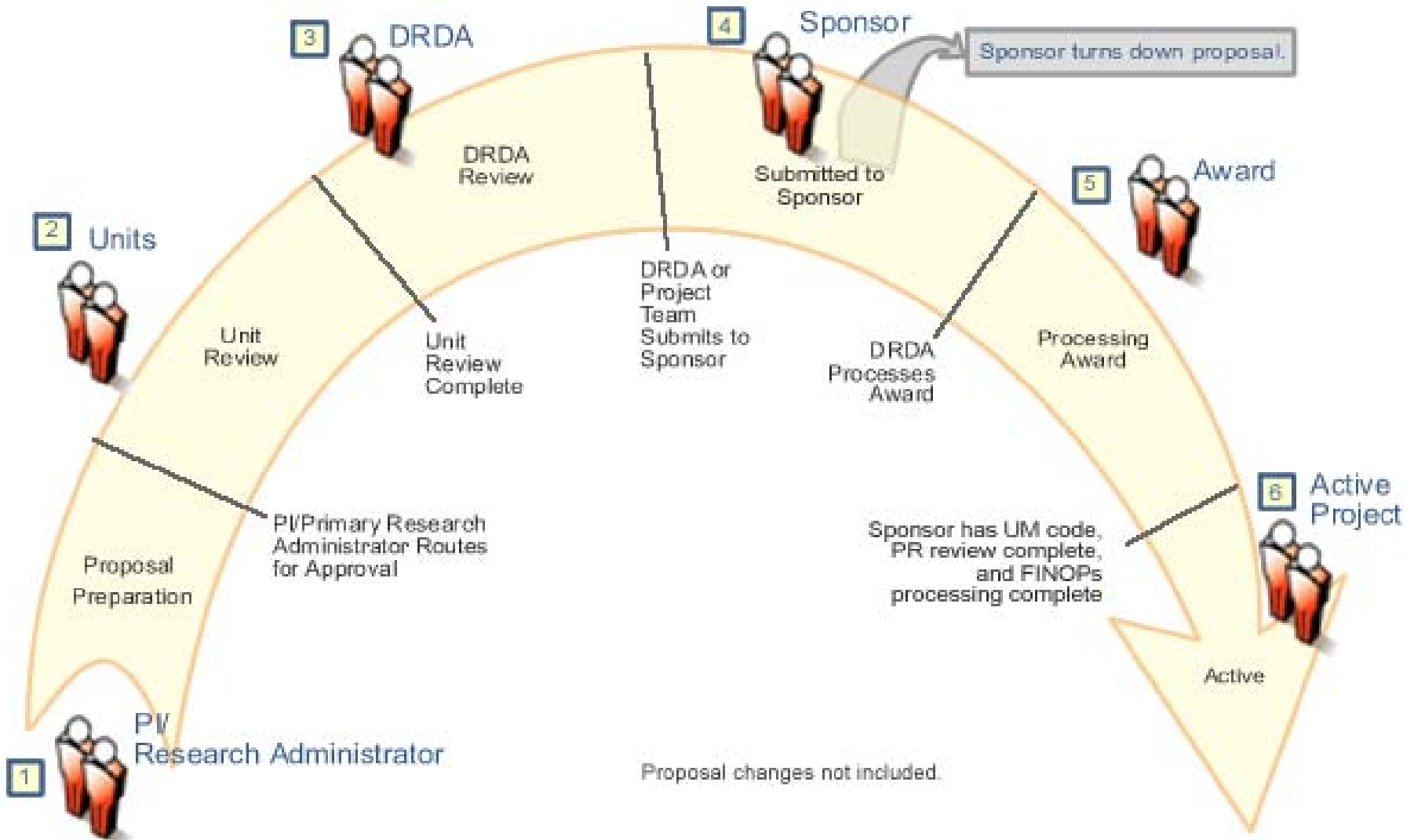
**3:00 – 4:30 pm**

- Project status
- Next task – setting optional flag for department review order
- Unit Liaison maintenance of department information (reviewers, email notifications, and contacts for proposal questions)
- Next Meetings

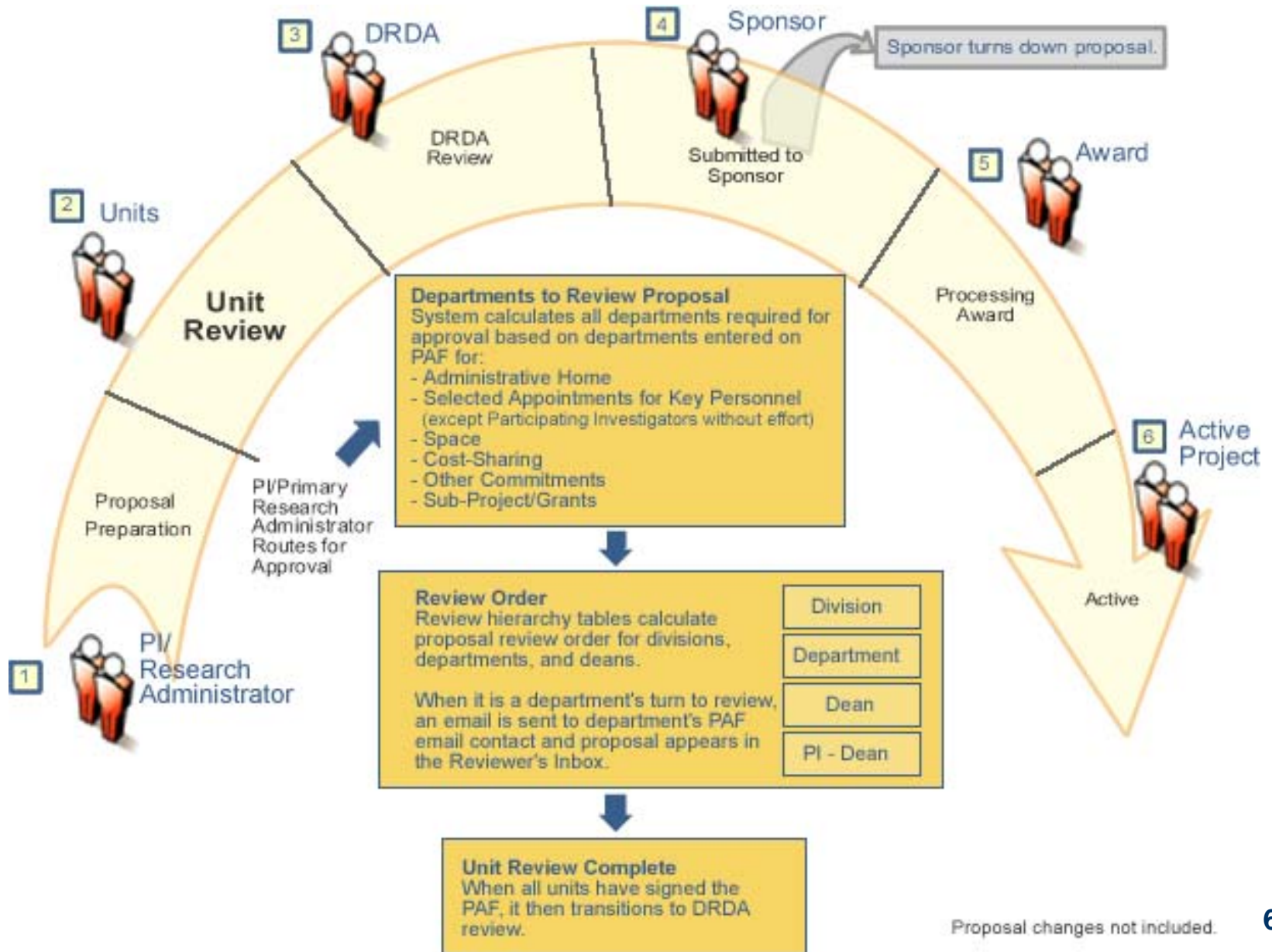
- System Design & Development
  - Nearing completion
- Testing
  - System Performance Testing
    - Complete
  - User Testing
    - TBD
- Limited Availability
  - Date to be determined
    - Pilot with 20-25 proposals from variety of units
  - Training
    - Support limited availability users
    - Training for full availability will start during the limited availability period
- Full Availability
  - Date to be determined

# Proposal Process Overview without Changes





# eResearch **M** Unit Review



**CRLT->DRDA**

**(very common – no other levels need to sign)**

**Epidemiology->School of Public Health->DRDA**

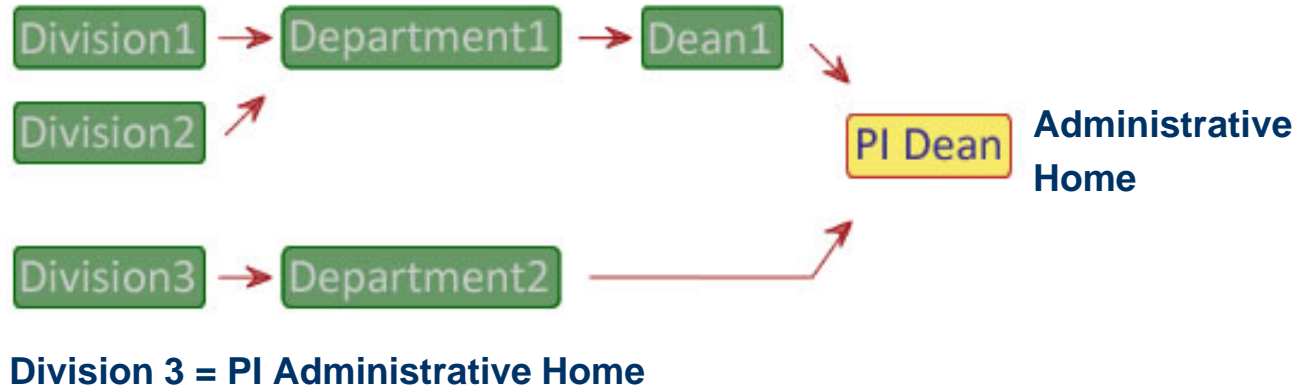
**(very common – one other level needs to sign before goes to DRDA)**

**Cardiology->Internal Medicine->Med School->DRDA**

**(not as common, but common at Med, two levels must sign before goes to DRDA)**

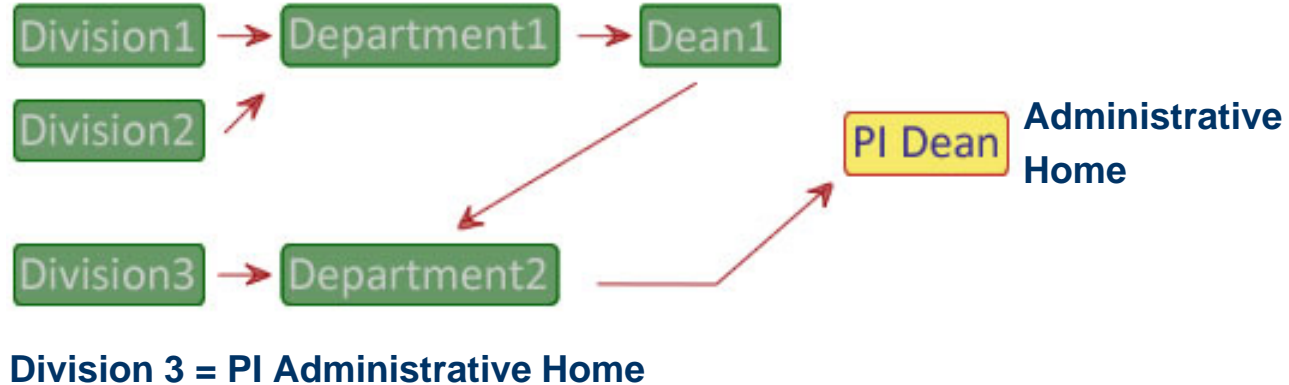
## Default no flag set

- Review order calculated by review hierarchy table



**Flag set** - Project Administrative Home Department does NOT review proposal until all other departments have completed review

- Review order calculated by review hierarchy table





- Flag defaults to **No**.
- Select **Yes** for department if the department should wait to begin review until ALL other departments have completed their review .

Remember this only is applicable when the department is the administrative home for a project.

MANAGE DEPARTMENT

**LSA Study of Complex Systems(550400)**

This department is a Division: no

If this department is a Division, the Parent Department of this Division is: no

Dean approval is NOT required:  Yes  No [Clear](#)

If this department is listed as the Home Department for any proposal, it should be the last to approve during the routing and approval of that proposal:

Add Delete		
Unit Liaison	Department	Is Backup Unit Liaison
<input type="checkbox"/> Kelly Doonan-Reed	MAIS Research Admin Systems	yes
<input type="checkbox"/> ul Kelly Doonan-Reed	Regents of the University of Michigan	yes
<input type="checkbox"/> Peggy Westrick	LS&A Dean's Area	

Contact for Proposal Questions:

Add Remove		
Person	Employer	Title
<input type="checkbox"/> Mita Gibson	LSA Study of Complex Systems	Business Administrator Associate

Reviewers Who Can Sign:

Add Remove		
Person	Employer	Title
<input type="checkbox"/> Mita Gibson	LSA Study of Complex Systems	Business Administrator Associate
<input type="checkbox"/> Carl Simon	LSA Study of Complex Systems	Professor of Mathematics, College of Literature, Science, and the Arts, Professor of Public Policy, Gerald R Ford School of Public Policy & Program Director, Program for Study of Complex Systems, OVRP

Reviewers:

Add		
Person	Employer	Title
There are no items to display		

PAF Email Notification:

Add Remove		
Person	Employer	Title
<input type="checkbox"/> Kelly Doonan-Reed	MAIS Research Admin Systems	Performance Support Analyst Senior
<input type="checkbox"/> Mita Gibson	LSA Study of Complex Systems	Business Administrator Associate

PAN/PAC Email Notification:

Add Remove		
Person	Employer	Title
<input type="checkbox"/> Mita Gibson	LSA Study of Complex Systems	Business Administrator Associate

**If box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.**

- Series of tasks to gather information to load data into the system
- To keep department information up to date and current, Research ULs will maintain the following in the eResearch Proposal Management Sandbox:
  - Reviewers
    - Reviewers
    - Reviewers who can sign (formerly known as Approvers)
  - Email notifications
    - PAF
    - PAC/PAN
  - Contacts for proposal questions (formerly known as Public Contacts to Facilitate Proposal Preparation & Review)

1. Login into Sandbox  
[http://hibiscus.mpathways.dsc.umich.edu/RsrPrpslMgt\\_sand](http://hibiscus.mpathways.dsc.umich.edu/RsrPrpslMgt_sand)  
 New link as of 4/14/08:  
<http://erpm-sandbox.dsc.umich.edu>
2. List of your departments appear in your UL Home Workspace.
3. Select department to maintain.
4. Make changes.
5. Click **OK** to save.

The screenshot shows the 'eResearch Proposal Management' interface. At the top, it says 'All PAFs' and 'Folder for ul Kelly Doonan-Reed'. The main content area is titled 'Inbox' and contains a section for 'Department Information in need of Review'. This section has a table with columns for Name, ID, Modified Date, and Edit. The table lists 'LSA Study of Complex Systems' with ID 550400 and a modified date of March 27, 2008 12:37:19 PM EDT. Below this is a 'Manage Department Information' section with a filter by Name dropdown and 'Go' and 'Clear' buttons. There are two tables below, one for 'Unit Liaison' and one for 'Contact for Proposal Questions'. The 'Unit Liaison' table has columns for Unit Liaison, Department, and Is Backup Unit Liaison. The 'Contact for Proposal Questions' table has columns for Person, Employer, and Title. There are also sections for 'Reviewers Who Can Sign', 'Reviewers', 'PAF Email Notification', and 'PAN/PAC Email Notification'. At the bottom, there is a checkbox for 'If box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.' and 'OK' and 'Cancel' buttons.

**3**

**4**

**5**

For detailed instructions, see:

- Unit Liaison Home Workspace – Field Description
- Manage Department Information – Review Access, Email Notification, and Contacts for Proposal Questions – Step-By-Step Procedure

- Complete task (Setting optional flag for department review order) before next Research UL meeting, 5/6/08
- Maintain department information in sandbox as needed

- May 6, 2008
  - Time: 3:00 - 4:30 pm
  - Location: School of Information North, Atkins Room
- July 1, 2008
  - Time: 3:00 - 4:30 pm
  - Location: Kipke