Research Unit Liaison Meeting

December 2, 2008
3:00 – 4:30 pm
● eRPM Project - Timeline Update (eRPM system not available 1/2/09)
● eRPM Pilot Report Out
● Preparation for All Campus Release - March 09
  – Department Roll-up Reports
  – Unit Readiness
  – Training
● OARS Training for Research ULs to grant access for eRPM data set
● Future meetings
December 25, 2008 – January 4, 2009 (Season Days)
  - DRDA Closed
  - No access to eRPM system or data set
  - Effective December 25 - PRISM data set retired

Starting January 5, 2009
  - eRPM system & data set available
  - DRDA enter all paper PAFs into eRPM system
    - New DRDA # format (FY-PAF12345)
    - DRDA will also enter any supplemental ePAFs forms with PAF

More implementation details:
http://www.umich.edu/~eresinfo/erpm/timeframe.html
Supplemental Information for ePAF (Proposal Approval Form)
- Created to capture new optional eRPM PAF questions
- Used during transition to eResearch Proposal Management System (Pilot & Initial All Campus Release)
  - Retired when ePAF retired and eRPM PAF required
- Sent to ULs only – not available online
- ULs distribute to units
- Staple to back of current ePAF
As of 12/1/2008:
- 6 PAFs entered by Pilot Participants in eRPM
- 3 submissions
- 1 Grants.gov submission
- 45 PAFs entered by DRDA staff
  - Any PAF entered by DRDA in eRPM system has new DRDA # format (FY-PAF12345)
  - Until 12/24 DRDA will continue to enter sub-set of paper PAFs into eRPM
  - Starting 1/5/09 DRDA will enter all paper PAFs into eRPM & any attached Supplemental ePAFs
- Faculty Appointments at School/College, not at Department level
  - Work-around – create future appointment for department level
- Issue for space too
  - Work-around override
- For full list of pilot observations so far, go to:
  - [http://www.umich.edu/~eresinfo/erpm/docs/eRPM_Conf_Call_08_1124.pdf](http://www.umich.edu/~eresinfo/erpm/docs/eRPM_Conf_Call_08_1124.pdf)
Prepare for March – Verify Dept. Roll-up

- All Research Unit Liaisons will be sent a report of Department Roll-up for their assigned Dept IDs for verification & validation
- Department Roll-ups are managed by the eRPM team
- Send any needed changes to erpm.contact@umich.edu

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Prepare for March – Manage Department Info

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- Reminder – You can manage department information directly in the eRPM production system
- Have added ability for Reviewers to update:
  - Reviewer
  - PAF email notifier
  - PAN/PAC email notifier
  - Public contact
- Only ULs can update:
  - Reviewer who can sign
- For directions see:
  http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf
- eRPM Business Process Tool
  - Lists all PAF questions (highlights fields required to route for approval, required to save, and optional fields), all onscreen help & link to additional help, notes questions that determine routing
  - Option for units to note unit specific directions, business process or if business process change is needed
- Next Unit Liaison Meeting will focus more on how units can prepare for All Campus Release (March 2009) and share tools to communicate with unit
We are currently testing our training with pilot participants.

Training is not required for anyone, but recommended for Research Administrators.

For all campus release, training will include:

- Instructor-led courses
  - PI/Research Administrator course
  - Reviewer course
  - Combined PI/Research Administrator & Reviewer course
- PAF Online Course
- Onscreen help & additional help pages
- Simple steps to complete tasks
- Flash demonstrations on how to complete tasks
- Quick Reference Cards
Starting in late January

- Training materials will be available online to support individuals who will not attend training (e.g., Deans, PIs) http://www.umich.edu/~eresinfo/erpm/training.html
  - Review & approve/sign PAF - Reviewers will have available simple steps & demonstrations that cover main tasks
  - PIs - Sign PAF Conflict of Interest Statement simple steps & demonstration

- Sign-up for instructor-led courses begins
  - Goal to schedule unit specific classes for:
    - Combined PI/Research Administrator & Reviewer course
    - Reviewer course
  - General classes will be scheduled for PI/Research Administrator
  - Courses will begin 6 weeks prior to all campus release
● All existing PRISM data set users granted access to eRPM Data set
● New requests to eRPM data set will be authorized by Research & Financial Unit Liaisons using OARS
● http://www.mais.umich.edu/access/index.html
Research Unit Liaison Meeting
- January 20, 2009
  - Time: 3:00 - 4:30 pm
  - Location: Kipke Conference Center
  - Topics: Training sign-up, March release questions