



Research Unit Liaison Meeting

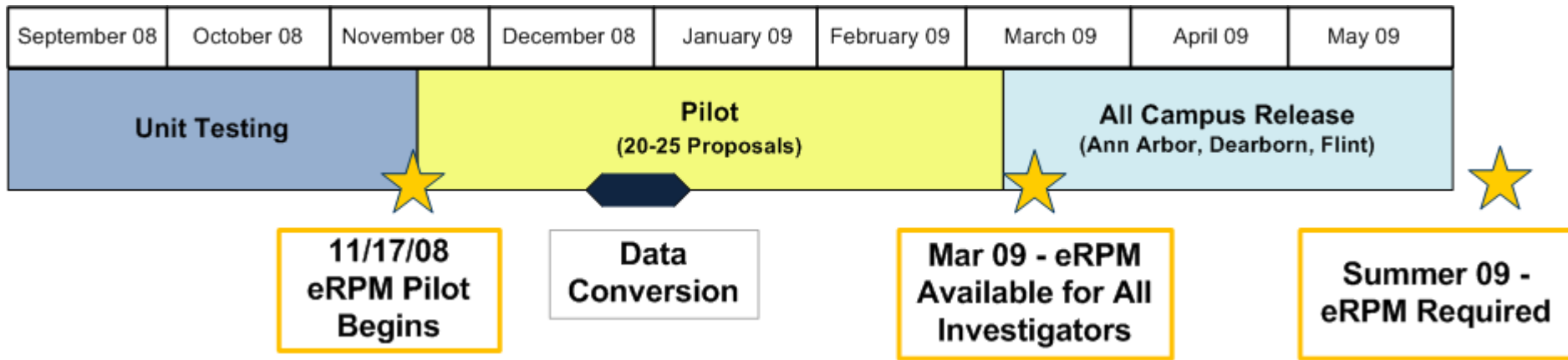
January 20, 2009

3:00 – 4:30 pm

**Johnson Rooms, Lurie Engineering Center,
North Campus**

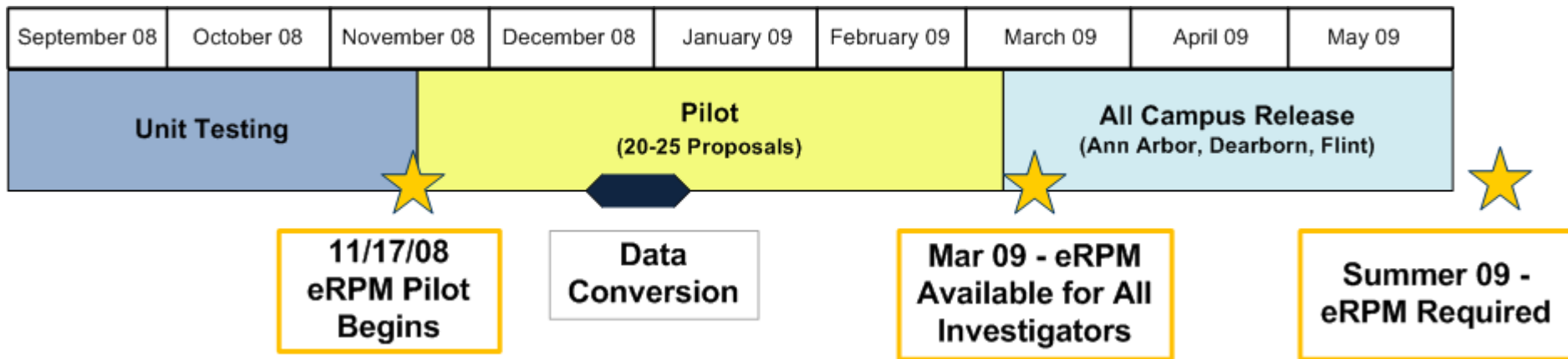
- eRPM Project – 1/5/09 Update
- eRPM Pilot Observations
- Preparation for All Campus Release - March 09
 - Unit Readiness
 - Training Planning & Registration
- Follow-up: OARS Training for Research ULs to grant access for eRPM data set
- Future meetings

eResearch **M** eRPM Project – Update 1/5/09



- PRISM
 - PRISM data set retired
 - All data converted & available in eRPM data set
 - Learn more: <http://www.research.umich.edu/proposals/prism/prism.html>
- DRDA now entering all paper PAFs into eRPM system
 - New DRDA # format (FY-PAF12345)
 - DRDA will also enter any supplemental ePAFs forms with PAF
 - Updates: http://www.umich.edu/~eresinfo/erpm/uls/supp_ePAF.html

eResearch **M** eRPM Project – Update 1/5/09 (cont)



- All PANs & PACs (award notifications) in the eRPM system.
 - Sample: http://www.umich.edu/~eresinfo/erpm/docs/eRPM_PAN_Sample.pdf
- Learn More:
http://www.umich.edu/~eresinfo/erpm/docs/comms/09_0105_eRPMupdate.html

eResearch **M** eRPM Pilot Report Out


August 08	September 08	October 08	November 08	December 08	January 09	February 09	March 09
Testing			Pilot				All Campus Release

A blue star is positioned at the end of the 'Testing' phase, which concludes at the end of October 2008.

- As of 12/24/2008:
 - 12 proposals created in eRPM system by pilot participants
 - 8 submissions
 - 1 Grants.gov system to system submission
 - 11 PIs have signed PAFs
 - 27 different departments (Dept IDs) have been involved in the routing & approval of pilot proposals
 - 179 paper PAFs entered by DRDA

eResearch **M** Some eRPM Pilot Observations...

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- Pilot participants found training beneficial
- Not all Grants.gov forms have been translated into eRPM
- Create PAF first when working with Grants.gov ---
Copy PAF information to Grants.gov forms – maps info from PAF into Grants.gov forms
- PAN/PACs
- Overall, some points to improve/clarify training
- For full list of pilot observations so far, go to:
 - <http://www.umich.edu/~eresinfo/erpm/pilotconfcalls.html>

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Things units need to think about:

- ❑ Unit eRPM usage requirement.
- ❑ Unit specific business policy for completing optional PAF questions.
- ❑ Verify Department Roll-up.
- ❑ Manage Department Reviewers, Email Notification Contacts & Public Contacts.
- ❑ Unit Specific Training Plans/Options.

See next slides for more detail.

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Unit eRPM usage requirement

- Confer with your unit to determine
Will your unit set a required date for unit to use eRPM prior to Summer 2009?
- Share unit specific required date with eRPM team to help plan support.

This date drives:

- When you need to have the rest of your action items completed
- When your unit needs to be trained on system

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- ❑ Detail any Unit specific business policy when completing PAF questions. Tools to help you:
 - 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
 - http://www.umich.edu/~eresinfo/erpm/docs/eResearch_PAF_Questions.xls
 - eResearch PAF Worksheet Questions
 - Supplement for eRPM Business Process Tool - screen shots of all eRPM PAF Questions
 - http://www.umich.edu/~eresinfo/erpm/docs/eResearch_PAF_Worksheet.doc

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Routing & Approval Unit Structure

□ Verify Department Roll-up

- Initially set-up by Unit Liaisons & loaded by eRPM team in Fall 2007
- Report sent prior to season days
- Department Roll-ups are managed by the eRPM team
- Send any needed changes to erpm.contact@umich.edu

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- ❑ Manage department information directly in the eRPM production system

OR

- ❑ Delegate to Reviewers
 - Reviewers can 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

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- ❑ Optional, meet with eRPM training staff to set-up custom training plans/sessions
 - One General Approach:
 - eRPM Overview & Unit Policies – 2 hours
 - eRPM staff present 1 hour eRPM Overview
 - Unit staff present 1 hour unit business policies
 - Unit specific hands-on training
 - Schedule training sessions for specific unit only
 - Would distribute unit specific policy (Excel worksheets)

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- Training is highly recommended for Research Administrators
 - Training is not required
- Do not expect Deans or PIs to attend training
 - Materials provided online specifically for PIs and Reviewers
- For all campus release, training will include:
 - Instructor-led courses
 - eRPM Proposal Preparation
 - Unit Review
 - PAF Online Course
 - Onscreen help & additional help pages
 - Simple steps to complete tasks
 - Flash demonstrations on how to complete tasks
 - Quick Reference Cards

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- eRPM Proposal Preparation & Unit Review
 - Combines the courses on proposal preparation and unit review
 - Prepares project team members and individuals who create & review (or facilitate the review) of proposals in the eResearch Proposal Management (eRPM) system by:
 - Facilitating the transition from current ePAF processing to working with Proposal Approval Forms (PAFs) in eRPM
 - Providing skills and knowledge to articulate eRPM workflow, create and manage PAFs/proposals, review and approve proposals (or show others how to do this), use system functionality to communicate with others, and view past transactions
 - Promoting electronic management of proposals from proposal preparation through submission to sponsor

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- eRPM Proposal Preparation & Unit Review


- Pilot participants found it helpful to have an understanding of both classes, even if they were not reviewers – helped facilitate review of proposals
- Prefer to group unit participants together in order to use relevant examples for participants
- If someone only needs Proposal Preparation suggest they take PAF online course which covers how to complete PAF
- Can make arrangements if strong desire to hold Proposal Preparation or Unit Review only sessions

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- Web registration through UM Research training/workshops
 - If you want unit specific classes, contact Jan Marten (jrmarten) or Kelly Doonan-Reed (kellydr) to set up sessions
 - General (open to anyone) classes available for registration:
 1. Go to:
<http://www.research.umich.edu/training/training.html>
 2. Click on "Currently Enrolling DRDA & Financial Operations workshops"
 3. Scroll to the class titled "eRPM Proposal Preparation and Unit Review"
 4. Click on "View Schedule"
 5. Click "Register" for the session that you want to attend. A confirmation email will be sent to you.

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- 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

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- ❑ Unit eRPM usage requirement.
 - ❑ If you plan to require your entire unit to use eRPM when we go live in March 2009, let us know ASAP (before 2/10/09).
- ❑ Required before March 2009 go live
 - ❑ Verify Department Roll-up.
 - ❑ Manage Department Reviewers, Email Notification Contacts & Public Contacts.
- ❑ Think about before March 2009 go live
 - ❑ Unit specific business policy for completing optional PAF questions.
 - ❑ Unit Specific Training Plans/Options.

- 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
- Instructions for submitting an OARS access request
 - eResearch data set descriptions
 - Who can initiate and authorize access requests
 - Step-by-step instructions on how to initiate and authorize an access request
 - Setting Unit Liaison Preferences in OARS
- <http://www.mais.umich.edu/access/index.html>

- Research Unit Liaison Meeting
 - April 7, 2009
 - Time: 3:00 - 4:30 pm
 - Location: To be determined