Agenda

- Update on eRPM go-live
- Discussion of changes made based on pilot feedback
- Processes handled outside of eRPM
- Training
- System support
- OARS update
- BusinessObjects Upgrade XI 3.1
- PRISM report conversion update
- Future meetings
● eRPM is now available for all campuses.
  – [http://www.umich.edu/~eresinfo/erpm/docs/comms/09_0325_eRPMupdate.html](http://www.umich.edu/~eresinfo/erpm/docs/comms/09_0325_eRPMupdate.html)

● Many units have set unit specific dates & communicated as appropriate.
  – Unit eRPM required dates:
    – [http://www.umich.edu/~eresinfo/erpm/docs/eRPM_unitdates_web.pdf](http://www.umich.edu/~eresinfo/erpm/docs/eRPM_unitdates_web.pdf)

● Continue to use both eRPM & paper PAFs until Summer 2009.

● Summer 2009 eRPM required & paper ePAF retired.
● Reviews during the interim period
  – If the administrative home of a proposal has decided to use eRPM you must complete your review in eRPM.
  – If the administrative home of a proposal has created a paper PAF, the review will still be completed on paper.

● Transition check-in
  – Are Reviewers prepared?
  – Additional support needed?
  – What has your unit been doing to help with the transition?
During the eRPM Pilot (from 11/17/08 – 3/29/09):

- 39 pilot proposals created in eRPM
- 37 submissions
- 14 Grants.gov system to system submissions
Some eRPM Pilot Observations…

- From pilot feedback, enhancements/changes made to eRPM in the following areas:
  - Proposal Preparation
  - Unit Review
  - New finalize proposal process
  - Grants.gov
  - Award Notifications
  - Training documents/classes

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<th>Aug 08</th>
<th>Sept 08</th>
<th>Oct 08</th>
<th>Nov 08</th>
<th>Dec 08</th>
<th>Jan 09</th>
<th>Feb 09</th>
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<td>Pilot</td>
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Required Summer 09
Some eRPM Pilot Observations...

- Received positive feedback about using eRPM.
- Pilot participants found training helpful.
- For summary of pilot observations & improvements, go to: http://www.umich.edu/~eresinfo/erpm/docs/eRPM_Conf_Call_09_0330.pdf
- For those who attended training during the pilot, we are working on a training document that highlights changes made during the pilot.
Processes Better Handled Outside eRPM

- Complete these tasks separately and use eRPM only to confirm the approvals:
  - Requesting cost sharing commitments from multiple parties.
  - Requesting Rackham Training Grant Tuition and Health Insurance Shortfall Assistance.
  - Requesting indirect cost waivers.
  - Requesting certain types of space approval.
### Manage Unit

**LSA UG: Environment (173300)**

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<th>Approval hierarchy</th>
<th>LSA UG: Environment (173300)</th>
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<tr>
<th>Unit Liaison</th>
<th>Department</th>
<th>Is Backup Unit Liaison</th>
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- Approval hierarchy (department roll-up) now visually organized
- Send any needed changes to MAIS Help Desk 734-936-7000, option 6 or maishelpdesk@umich.edu
- For more information, see: [http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_UL_manageaccess_SS.pdf)
Training Materials

- Onscreen Help
  - Brief directions on how to complete question with link to more information.
- Classroom sessions
  - Comprehensively cover PAF creation, the review process, the review routing table, making changes when a PAF is out for review, managing proposal data during unit review, how to review/approve, and PAN/PAC notifications.
- PAF online course
  - Just covers the creation of the PAF. Does not cover the review process, routing, or changes to the PAF.
● **Online training materials**

● Job Aids - print and keep by your side when using the system for quick tips and reminders.
  
  – PI Sign PAF/Conflict of Interest

  – PAF Creation/Completion
    ● [http://www.umich.edu/~eresinfo/erpm/docs/Reference_CARD_PropPrep_to_Route.pdf](http://www.umich.edu/~eresinfo/erpm/docs/Reference_CARD_PropPrep_to_Route.pdf)

  – Proposal Review Basics
- Questions about when to use eRPM or Unit Business Policy/Requirements
  **Research Unit Liaison**

- Technical support (e.g., navigation, connectivity, and system errors)
  **MAIS Help Desk**
  Phone: 734-936-7000, option 6
  E-mail: maishelpdesk@umich.edu

- Submission or sponsor specific questions
  **DRDA Project Representatives**
  Phone: (734) 764-5500
  Fax: (734) 763-4053, 764-8510
Online Access Request System (OARS) Unit Liaison Authorization Step-By-Step Procedure

- E-mail notifications for OARS requests other than eResearch data sets
- [http://www.mais.umich.edu/access/index.html](http://www.mais.umich.edu/access/index.html)

BusinessObjects Upgrade XI 3.1
- Much, much different than last upgrade
- Supports Macintosh users
- Still two levels of access (InfoView & WebI)
- InfoView offers enhanced formatting capabilities
- Kate Strzempek
  kateocon
  734 936 1284
Future Meetings

- Research Unit Liaison Meeting
  - June 2, 2009
    - Time: 3:00 - 4:30 pm
    - Location: 2029 Kipke Conference Center, Campus Safety Services Building