



## **Research Unit Liaison Meeting**

**April 7, 2009**

**3:00 – 4:30 pm**

**Atkins Room**

**School of Information North**

- 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

Aug 08	Sept 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	March 09	April 09	May 09	June 09	July 09	August 09
Testing		Pilot						Starting 3/30/09 All Campus Release				

 Required  
Summer 09

- 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.

Aug 08	Sept 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	March 09	April 09	May 09	June 09	July 09	August 09
Testing		Pilot						Starting 3/30/09 All Campus Release				

★ Required  
Summer 09

- 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?

# eResearch **M** eRPM Pilot Report Out

Aug 08	Sept 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	March 09	April 09	May 09	June 09	July 09	August 09
Testing			Pilot					Starting 3/30/09 All Campus Release				

★ Required  
Summer 09

- 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

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

Aug 08	Sept 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	March 09	April 09	May 09	June 09	July 09	August 09
Testing			Pilot					Starting 3/30/09 All Campus Release				

★ Required  
Summer 09

- 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

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

Aug 08	Sept 08	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	March 09	April 09	May 09	June 09	July 09	August 09
Testing		Pilot						Starting 3/30/09 All Campus Release				

- 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](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.

★ Required  
Summer 09

- 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)**

Dean Approval **IS** required.

routes to... ➔ College of Lit, Science & Arts (174200)

routes to... ➔ LSA Dean: Undergrad. Education (171300)

Approval hierarchy: LSA UG: Environment (173300 )

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If this unit is listed as the Administrative Home for any proposal, it should be the last to approve before the Dean's Office during routing and approval: no

Unit Liaison	Department	Is Backup Unit Liaison
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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](mailto: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)

- 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
    - [http://www.umich.edu/~eresinfo/erpm/docs/ReferenceCard\\_PISignPAF.pdf](http://www.umich.edu/~eresinfo/erpm/docs/ReferenceCard_PISignPAF.pdf)
  - 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
    - [http://www.umich.edu/~eresinfo/erpm/docs/Reference%20Card\\_REV.pdf](http://www.umich.edu/~eresinfo/erpm/docs/Reference%20Card_REV.pdf)

- 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](mailto: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>
  
- 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

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