

## Manage Data

When a PAF is routed for approval, it is put into a non-editable state. There are certain types of data that can be changed without putting the PAF Worksheet into an editable state & creating change logs using Manage Data.

**Note:** Directions on how to use [Related PAFs](#) & [Finalize for Submission to Sponsor](#) are covered in their own procedures. See the eRPM training page: <http://www.umich.edu/~eresinfo/erpm/training.html>.

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### PAF Workspace

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes the user name 'Lisa Jones', 'My Home', 'Clipboard', and 'Logoff'. The main content area displays details for a PAF titled 'Experimental Methodology on Panic and the Easy Button'. A 'Manage Data' modal window is open, listing several options: 'Change Primary Research Administrator', 'Finalize for Submission to Sponsor', 'Manage Administrative Personnel', 'Related PAFs', and 'Submission Instructions'. A red box highlights the 'PAF Worksheet' link in the left sidebar, and a black box with the number '1' points to the 'Change Primary Research Administrator' option in the 'Manage Data' menu.

1. Click on one of the **Manage Data** views from the PAF Workspace.

Notice that the PAF cannot be edited and the worksheet can only be viewed.

**CHANGE PRIMARY RESEARCH ADMINISTRATOR**

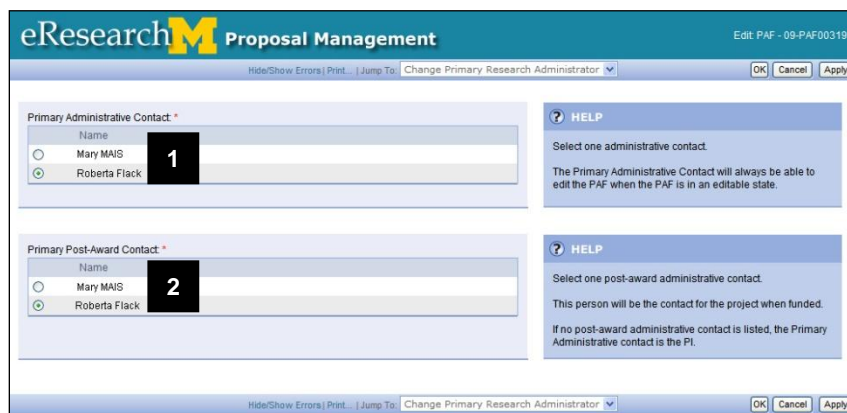
**Who Can Change Primary Research Administrator:** Administrative or Key Personnel who have rights to edit a PAF.

The Primary Research Administrator is initially identified during Proposal Preparation. This person receives email notifications and has the ability to route the PAF for approval. There may be occasions when another person needs to take the role of primary research administrator on the PAF.

Once a PAF has moved into the state of Unit Review, the primary research administrator can be changed to anyone *currently listed* as administrative personnel without making changes to the PAF worksheet.

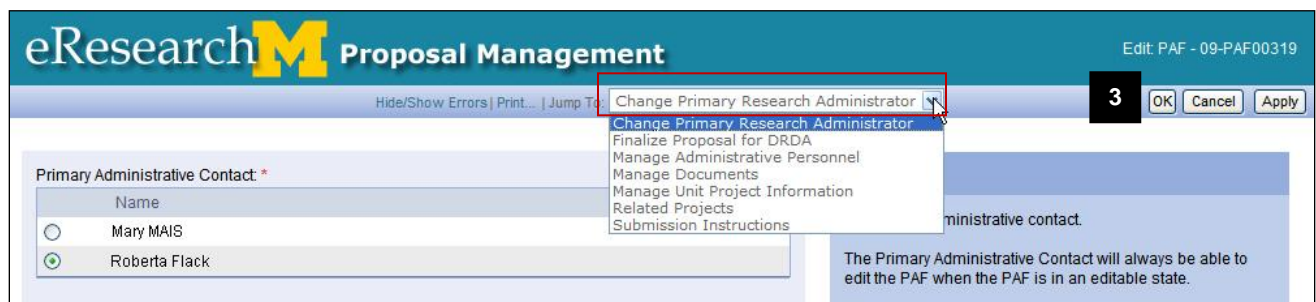
**Note:** You may add additional administrative personnel using the Manage Administrative Personnel procedure on page 4 of this document.

**Change Primary Research Administrator page**



1. **Select** Primary Administrative Contact.
2. **Select** Primary Post-Award Contact.
3. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views



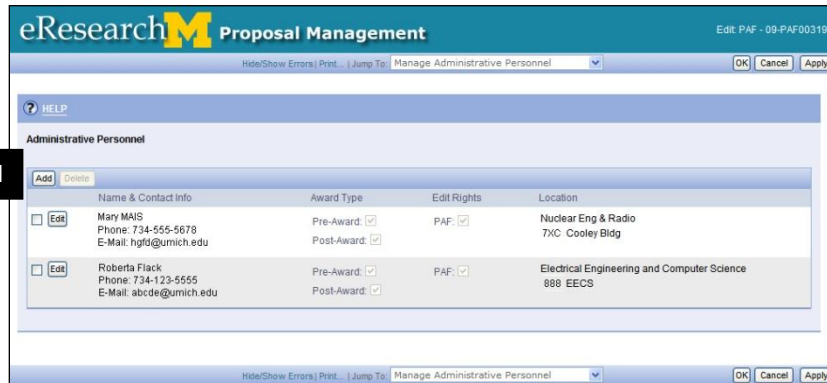
**MANAGE ADMINISTRATIVE PERSONNEL**

**Who Can Manage Administrative Personnel:**

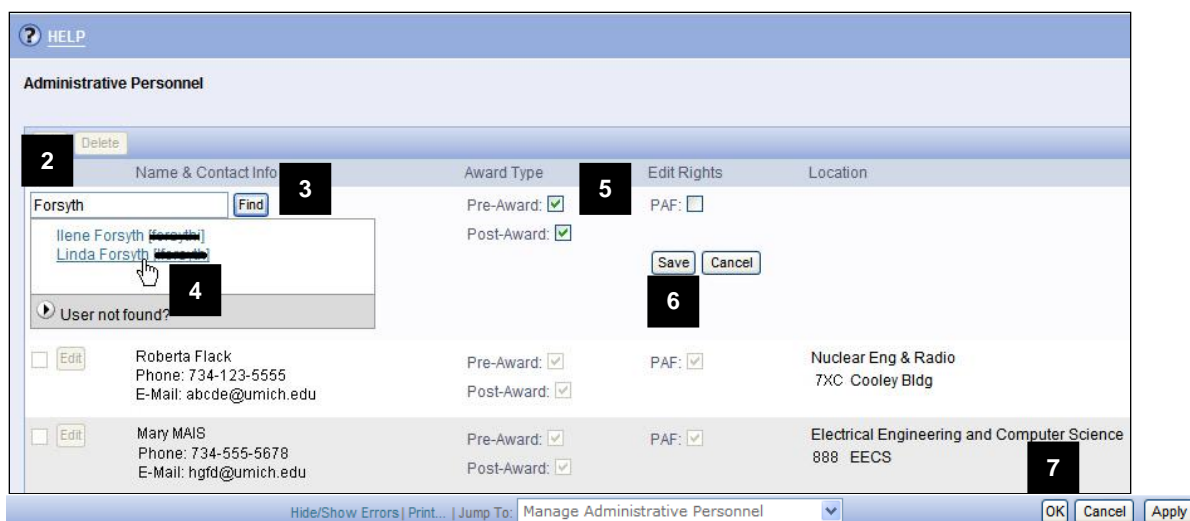
- Administrative or Key Personnel who have rights to edit a PAF
- Reviewers from the PAF’s Administrative Home

Administrative Personnel are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, administrative personnel can be added, deleted and edit rights managed without making changes to the PAF worksheet.

**Administrative Personnel page**



1. Click **Add**.



2. Enter last name or unique name.
3. Click **Find**.
4. Select person from the list.
5. Select **Award Type** and **Edit Rights**.
6. Click **Save**.
7. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views

## SUBMISSION INSTRUCTIONS

**Who Can Change Submission Instructions:** Primary Research Administrator or UM PI

Submission instructions are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, submission instructions can be managed without making changes to the PAF worksheet. It is important to keep your submission instructions up to date in order to facilitate a timely submission.

### Submission Instructions

1. Select all **Proposal Submission** options.
  - This information assists DRDA in processing your proposal.
  - Do not select both **eResearch submission to Grants.gov** & **Adobe Submission to Grants.gov**.
    - **eResearch submission to Grants.gov** is only used when your Grants.gov forms are supported by eResearch
    - **Adobe Submission to Grants.gov** is only used when your Grants.gov forms are NOT supported by eResearch & you must use Adobe to submit to Grants.gov.
2. Update the **Will DRDA Submit this proposal** question.
3. Enter **Notes for DRDA**.
  - Describe your submission method if you select **Other**.
  - Include the proposal delivery/routing contact & contact information (address, fax number, email, etc.).
  - Include any additional information for DRDA, such as:
    - Whether an institutional (cover) letter is required; DRDA Signature is required; DRDA should provide contract
    - Indicate if this project is being proposed under a special program type, e.g. SBIR, STTR, etc.
    - Specify if these notes are award related and not related to final proposal submission to sponsor.
4. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views