

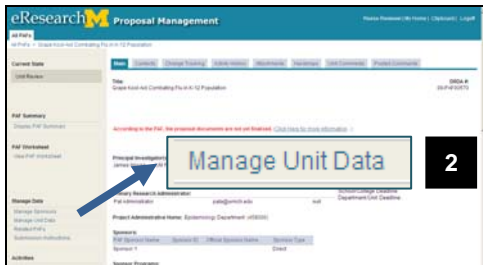
Manage Unit Data – Coming 2/1/2010

- Enables departments to capture their own information for any project where the department is an approving department. E.g., Approver of space, budget, personnel with effort, or cost-sharing
- Unit Data is sent to the Proposal Management data set nightly.
- Anyone with access to the Proposal Management data set can view the data. It is not restricted to the department that entered the data.
- Departments set guidelines regarding expectations about the data collected, when to collect data & reporting on this data using the Proposal Management data set. If you have questions, contact your Research Unit Liaison.

Important Information

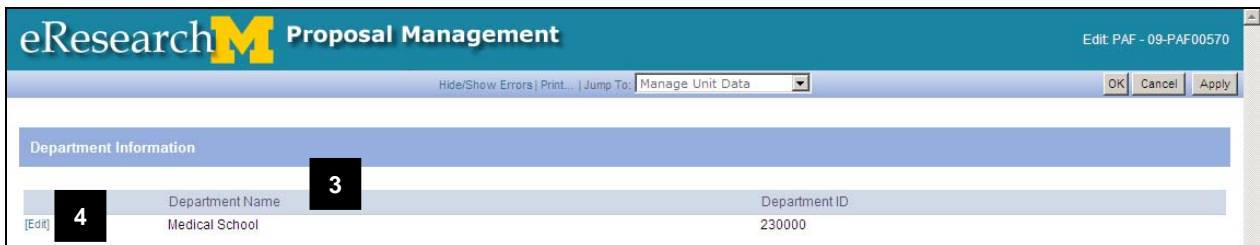
- For a Dept ID, you must be a Unit Data Manager in eRPM to enter Unit Data.
- Unit Data entries are not saved until you click **OK** on the **Edit Proposal Unit Information** window & click **OK** on the **Manage Unit Data** page. If you do not click OK on both the window & page your entries are NOT saved.
- Commitments are not saved until you click **OK** on the **Commitment Details** window, click **OK** on the **Edit Proposal Unit Information** window & click **OK** on the **Manage Unit Data** page.
- Unit data can be entered in any state in eRPM, e.g., Proposal Preparation, Unit Review, Submitted to Sponsor, etc.

PAF Workspace



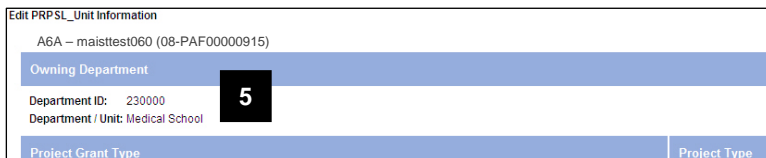
1. Locate the PAF for which you want to enter Unit Data using your **Home Workspace** or searching using **All PAFs**.
2. From the PAF Workspace, click **Manage Unit Data**. (If you do not see the Manage Unit Data link, this means you are not listed as a Unit Data Manager on any of the approving departments for this PAF).

Manage Unit Data



3. A list of all Departments related to this PAF/Project that you have access to view & edit Unit Data display.
4. Click **Edit** to enter/edit to open a new window to enter unit data for this PAF/Proposal.

Edit Proposal Unit Information Window



5. Enter all needed information on the **Proposal Unit Information** window. Refer to field descriptions on the next pages for more information.

Edit Proposal Unit Information Window

The screenshot shows the 'Edit PRPSL_Unit Information' window. Callout letters A through I are placed over specific fields and buttons:

- A**: Owning Department (Department ID: 230000)
- B**: Project Grant Type Code dropdown
- C**: Project Sponsor Reference Numbers section
- D**: Project Type Code dropdown
- E**: Project Type Detail text area
- F**: Fund Type dropdown
- G**: Unit Fees Charge Fee section
- H**: Unit Fees Waiver checkbox
- I**: Unit Fees Waiver Description text input

Letter	Field/Button	Description
A	Department ID	Department for which you are a Reviewer or Reviewer who can sign. You are entering unit data on behalf of this department. This Owning Dept ID is what you will use to limit your queries in Business Objects to ensure that only relevant Unit Data is returned.
B	Project Grant Type Code:	Primarily used by the Medical School. Selection options include: Non-Subdiv Account , Parent Account, Sub Account, Cross Reference, Sub Account of Other School, Other School.
C	Project Sponsor Reference Numbers	Fields for Direct & Prime Sponsor Reference Numbers. Fields include: PHS Fund Type, PHS Project Type, PHS Institute Code, PHS Budget Year, Award No., PHS Research Supp
D	Project Type Code:	Primarily used by the Medical School. Selection options include: Research project, Research career devel/FWSP, Research program project center, Research training, Research equipment, Research Other, Instructional, Research non-faculty FWSP, Unlisted.
E	Project Type Detail:	Text box where detail can be included.
F	Fund Type:	Selection options include: New, New Resubmission, Competitive Renewal, Competitive Renewal Resubmission, Non Competitive Renewal, Non Competitive Renewal Prorated, Supplement, Increment, Cross Reference
G	Unit Fees Charge Fee:	<i>Fee:</i> U.S. currency. <i>Description:</i> A brief description of the Fee. You may add as many Charge Fees as you like. Click the ADD button to start a new row.
H	Unit Fees Waiver	Check box to indicate if a charge waiver exists. <ul style="list-style-type: none"> • Box checked = yes, there is a charge waiver. • Box not checked = no, there is not a charge waiver.
I	Unit Fees Waiver Description	Description of the charge waiver.

Edit Proposal Unit Information Window (Continued)

Letter	Field/Button	Description
J	Considerations Has Unit Space	Check box to indicate if a department/unit has space. <ul style="list-style-type: none"> Box checked = yes, department/unit has space. Box not checked = no, department/unit does not have space.
K	Considerations Has Cost Share	Check box to indicate if a department/unit has received external cost sharing. <ul style="list-style-type: none"> Box checked = yes, department/unit has cost share. Box not checked = no, department/unit does not have cost share.
L	Considerations FDP	Check box to indicate is a Federal Demonstration Partnership <ul style="list-style-type: none"> Box checked = yes, there is a Federal Demonstration Partnership. Box not checked = no, there is not a Federal Demonstration Partnership.
M	Considerations Met Unit Deadline	Indicates whether or not the proposal met any internally defined unit deadlines (generally indicated on the PAF with optional deadline row(s)). Options include: Yes, No, N/A
N	IDC Waiver:	Indicates whether or not an Indirect Cost Waiver was submitted. <ul style="list-style-type: none"> Box checked = yes, Indirect Cost Waiver was submitted. Box not checked = no, Indirect Cost Waiver was NOT submitted.
O	IDC Original Rate:	Used to indicate the original pre-waiver Indirect Cost Waiver rate.
P	Estimated Waiver Amount:	Used by the unit to display the balance resulting from the Indirect Cost Waiver (i.e., the amount of money lost due to issuance of IDC Waiver). U.S. currency.
Q	Internal Ref. No.	Used by the unit to track the file internally. Unit-defined reference
R	Additional Title Information	Supplemental title information used for tracking.
S	Archive No.	Unit-defined archive reference. For instance, if the unit maintains a physical archive and assigns archive numbers based on their own internal system, they can reference the number here for future look-up.
T	Add Notes	Used for additional notes needed for tracking information.
U	Original End Date	If a No Cost Time Extension has been issued on any of the commitment lines associated with this owning department, the project original end date will be displayed here.

Edit Proposal Unit Information (Continued)

Letter	Field/Button	Description
V	Payment Terms	Select as many payment terms as relevant.
W	Payment Notes	Enter relevant payment notes.
X	Impact (e.g., Geographical)	Enter as many impact terms as needed. Click Add to save each term needed. You will need to select the OK button on the bottom right of this window & click OK on the Manage Unit Data page to save your work to eResearch.
Y	Initiative	Enter as many initiative terms as needed. Click Add to save each term needed. You will need to select the OK button on the bottom right of this window & click OK on the Manage Unit Data page to save your work to eResearch.

Edit Proposal Unit Information (Continued)

6. To enter commitments, click **Add** to open a Commitment window.

7. Enter needed commitment details. See field descriptions on the next pages for more information.

Commitment Detail Window

Letter	Field/Button	Description
A	<Prev Next>	After saving your unit data, the Previous & Next buttons are available when there are multiple commitment lines. Use to navigate between commitment lines without having to return to the Edit Proposal Unit Information window.
B	Commitment Department	Department that has made the commitment.
C	Key Personnel	List of all UM PIs, Sponsor PIs, Participating Investigators with or without effort who have EVER been on the PAF. Multiple PIs can be selected for a single commitment.
D	Related Project PAF	If relationships are established, Related PAF displays.
E	Commitment State Date	Start of commitment.
F	Commitment End Date	End of commitment.
G	Original End Date	If a No Cost Time Extension has been issued on any of the commitment lines associated with this owning department, the original end date will be displayed here.
H	Fund Type	Selection options include: Competitive Renewal, Competitive Renewal Resubmission, Cross Reference, Increment, New, New Resubmission, Non Competitive Renewal, Non Competitive Renewal Prorated, Supplement
I	Reference Numbers	Fields for Direct & Prime Sponsor Reference Numbers. Fields include: PHS Fund Type, PHS Project Type, PHS Institute Code, PHS Budget Year, PHS Research Supp

Commitment Detail Window (Continued)

The screenshot shows the 'Commitment Detail Window' with several key sections:

- Date Commitment Received:** A date picker field labeled 'J'.
- Is Current Commitment?:** A checkbox labeled 'K'.
- UM Cost Sharing Details:** A table with columns: Line Item, Dept ID, Department (L1), Source (L2), Direct (L3), Journal Entry (L4), and Has Been Paid (L5). An 'Add' button is labeled 'L'. Below the table, it says 'There are no items to display'.
- Sponsor & Cost Sharing Totals:** A summary table with columns: Sponsor, UM Cost Sharing, and Total. Rows include Direct Costs (M), Indirect Costs, and TOTAL (N).
- Project Grants:** A table with columns: PGN, Status, Is Parent?, Title, Short Code, and CS Short Code. It says 'There are no items to display'.
- Project Grant Type:** A dropdown menu labeled 'O'.
- Commitment Notes:** A text area labeled 'Q'.

Letter	Field/Button	Description
J	Date Commitment Received	Date commitment was received.
K	Is Current Commitment?	Check box to indicate if comment is current. <ul style="list-style-type: none"> Box checked = yes, is current commitment. Box not checked = no, is NOT current commitment.
L	UM Cost Sharing Details	Click Add open a new window & enter as many UM cost sharing commitment lines as needed.
L1	Department	Department of either department that made the commitment to cost share.
L2	Source	Cost-share source.
L3	Direct	Direct cost share funds. Note indirect costs are tracked, but you need to click edit to view the indirect cost sharing detail.
L4	Journal Entry	Used to track cost share journal entry lines.
L5	Has Been Paid	Check box to indicate if cost share has been paid. <ul style="list-style-type: none"> Box checked = yes, is cost share has been paid. Box not checked = no, is NOT paid.
M	Sponsor Direct & Indirect Costs	Enter sponsor direct & indirect costs.
N	Totals	Row & column totals for Sponsor Direct Costs, Sponsor Indirect Costs, and UM Cost Sharing.
O	Project Grants	List of all PGNs associated with PAF. Select all associated with commitments.
P	Project Grant Type	Primarily used by the Medical School. Selection options include: Cross Reference, Non-Subdiv Account, Other School, Parent Account, Sub Account, Sub Account of Other School.
Q	Commitment Notes	Used to enter relevant commitment notes.

Commitment Detail Window

8. Click **OK** to save your commitment detail & return to the **Proposal Unit Information** window.

Important! Commitments are not saved until you click **OK** on the **Commitment Details** window, click **OK** on the **Edit Proposal Unit Information** window & click **OK** on the **Manage Unit Data** page.

Edit Proposal Unit Information (Continued)

9. After saving your first commitment detail, you have the option to copy commitment detail lines. **Copy** copies everything except the Start & End Dates.

10. Click **Add** to open a new window to upload any needed supporting documents.

11. Click **OK** to on the **Edit Proposal Unit Information** window to return to the **Manage Unit Data** page.

12. Click **OK** on the **Manage Unit Data** page.

IMPORTANT! You must click **OK** on the **Manage Unit Data** page to save all of you Unit Data entries. If you do not click OK here, you will lose work.

IMPORTANT! When you return to the **Manage Unit Data** page do not click **Edit** to make changes until you click **OK** to save all of you Unit Data entries. You will lose work if you click **Edit** before you click **OK**.

Manage Unit Data