

Manage Department Information Review Access, Email Notifications, and Contacts for Proposal Questions

- Unit Liaisons (ULs) & Reviewers can manage department information for their assigned departments. They can:
 - Add department information: Page 2
 - Create Proposal Management Accounts: Page 6
 - Delete department information: Page 7

Important Information



Refer to your Unit policy about who should Manage Department information.

- Some units may want the Research Unit Liaison to manage all of this information
- Some units may pick a point reviewer to manage this information
- Some units may ask individual reviewers to manage information, etc.

Contact your Research Unit Liaison for more information:

http://www.umich.edu/~eresinfo/erpm/uls/ruls_list.html



Information managed by a Reviewer or Research Unit Liaison for his/her assigned departments includes:

- **Reviewer**
Person in Dept ID who can Review Proposals
- **Reviewer Who Can Sign**
Person in Dept ID who can Approve (Review & Sign) Proposals
Important! Can only be changed by Unit Liaison.
- **Department Contact**
For Dept ID, Public Contact to Facilitate Proposal Preparation & Review Questions
- **Department PAF Notifiers**
For Dept ID, person or email group who receives email notification when item such as a PAF or hardship is sent to their department for review.
Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).
- **PAN/PAC Notifier**
For Dept ID, person or email group who receives email notifications of new PAN/PACs after DRDA completes the Release Award Notification activity.
Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).
- **Unit Data Managers**
For Dept ID, person(s) who will manage Unit Data (via the Manage Unit Data activity). Only people listed here will be able to view or edit Unit Data for this department.



If you need a new department added, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>.

Include:

- Name and Dept ID of the new department
- If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy

ADD DEPARTMENT INFORMATION

Add Reviewer, Reviewer Who Can Sign (only Unit Liaison Can Manage This), Contact for Proposal Questions, or Email Notifications.

Unit Liaison - Home Workspace

1. Go to: <http://eresearch.umich.edu/>, under Proposal Management click **Login**.
2. Login using your unickname & password.
3. Click on the correct role.
Unit Liaisons, click **Unit Liaison** role.
Reviewers, click **Reviewer** role.
4. If you are a Reviewer, click the **Manage Departments** Tab in your Home Workspace.

Reviewer - Home Workspace

5. Find the department that needs information managed. All the departments that you are assigned to are displayed.

Tip: Use **Filter by** to search for departments by ID (number) or name. Select a **Filter by** criteria, enter a keyword in the field, and click **Go**.

Note: If you cannot find a needed department, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html> .
Include: Name and Dept ID of the department

Unit Liaison Home Workspace

The screenshot shows the 'Unit Liaison Home Workspace' interface. On the left, there is a sidebar with 'Roles' and 'Unit Liaison'. The main content area is titled 'Inbox' and contains two sections: 'Department Information in need of Review' and 'Manage Department Information'. The 'Department Information in need of Review' section has a table with the following data:

Name	ID	Modified Date	Edit
LSA Study of Complex Systems	550400	March 27, 2008 12:37:19 PM EDT	Manage Department

The 'Manage Department Information' section has a filter bar with 'Filter by Name' and a search input field. Below it is another table with the following data:

Name	ID	Edit
LSA Study of Complex Systems	550400	Manage Department

A black box with the number '6' is positioned over the 'Manage Department' link in the second table.

6. From your Home Workspace, click **Manage Department**

Note: Unit Liaisons have two sections **Department Information in need of Review** and **Management Department Information**. They can click Management Department from either section.

Note: Departments are in the **Department in need of Review** section if they have been newly added. They are put in this section to flag them for you so that you realize that they need review and department information added.

Manage Department Information

Manage Department

Internal Medicine(236999)

Dean Approval **IS** required.

7 routes to... Medical School (230000)
routes to... Med Sch Admin Core Roll-up (230991)

Approval hierarchy: Internal Medicine (236999)

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: Yes No

Unit Liaison(s): **8**

Unit Liaison	Department	Is Backup Unit Liaison
Pat Investigator	Regents of the University of Michigan	no
Unit Liason	Grant Review and Analysis	

9 Add Remove

Contact for Proposal Questions:

Person	Employer	Title
<input type="checkbox"/> Contact Person	Int Med-Cardiology	Contract & Grant Specialist
<input type="checkbox"/> Contact Person	Internal Medicine Department	Contract and Grant Specialist, Internal Medicine Department, Medical School

Add Remove

Reviewers Who Can Sign:

Person	Employer	Title
<input type="checkbox"/> Reviewer	Internal Medicine Department	Research Process Senior Manager, Internal Medicine Department, Medical School
<input type="checkbox"/> Reviewer	Students	Chief Department Administrator, Internal Medicine Department, Medical School

Add Remove

Reviewers:

Person	Employer	Title
<input type="checkbox"/> Reviewer	Int Med-Cardiology	Contract & Grant Specialist
<input type="checkbox"/> Reviewer	Internal Medicine Department	Contract and Grant Specialist, Internal Medicine Department, Medical School

Add Remove

PAF Email Notification:

Person	Employer	Title
<input type="checkbox"/> Email	Unknown	

Add

PAN/PAC Email Notification:

Person	Employer	Title
There are no items to display		

Add

Unit Data Managers:

Person	Employer	Title
There are no items to display		

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.

Note: If the user is not in the system, you may [Create A New User Account...](#)

7. Verify the information about the department.

If changes are needed, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>. Include:

- Name and Dept ID of the new department
- If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy.

8. The Unit Liaisons for the department are listed.

To make changes contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>.

9. To add a new **Contact for Proposal Questions, Reviewer, Reviewers Who Can Sign** (only ULs can edit this) **PAF Email Notification**, or **PAN/PAC Email Notification**, click **Add**.

Select One or More Persons

10. Select a **Filter by** criteria (e.g., Last) and enter a keyword (e.g., last name) in the field.

Note: Click Advanced to use multiple Filter by criteria.

11. Click **Go**.

12. Select the person to add.

13. Click **OK** to add the person and return to the Management Department Information page.

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box. **14**

Note: If the user is not in the system, you may [Create A New User Account...](#)

15

14. If you needed to verify information for this department and have completed your review, unselect this box so that it does not continue to appear in your **Department Information in need of Review** section of your Inbox.

15. Click **OK** to save your work and return to your Home Workspace.

CREATE PROPOSAL MANAGEMENT ACCOUNT

Many Proposal Management accounts have been pre-created. Accounts are automatically created the first time a person with a unique name & password logs into eResearch Proposal Management.

If you cannot find a person in the Proposal Management system when adding new information for your department, you may create a new user account.

Unit Liaison Manage Department Information

1. Click the **Create A New User Account...** link on the bottom of the **Manage Department Information** page.

2. Select the search type.
3. Enter the last name or unique name.
4. Click **Search** to search for the person against the M-Pathways Human Resources data.

Unique Name	FirstName	MiddleName	LastName
USER			User Last Name

5. Click the person's **Unique Name** to select person who needs an eResearch account created.

6. Verify that you have found the correct person.
7. Click **Save** to create an eResearch Proposal Management account for the person.

8. Click **OK** when the User Account Success creation message appears. You will now be able to find the person when managing department information.

DELETE DEPARTMENT INFORMATION

If a person should no longer be a Reviewer, Reviewer Who Can Sign, Contact for Proposal Questions, or Email Notification you can delete (remove) the person from your department information.

Unit Liaison Manage Department Information

Manage Department

Internal Medicine(236999)

Dean Approval **IS** required.

routes to... Medical School (230000)

routes to... Med Sch Admin Core Roll-up (230991)

Approval hierarchy: Internal Medicine (236999)

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: Yes No [Clear](#)

Unit Liaison(s):	Unit Liaison	Department	Is Backup Unit Liaison
	Pat Investigator	Regents of the University of Michigan	no
	Unit Liaison Grant Review and Analysis		
	<input type="button" value="Add"/>	<input type="button" value="Remove"/>	2
Contact for Proposal Questions:	Person	Employer	Title
<input type="checkbox"/>	Contact Person	Int Med-Cardiology	Contract & Grant Specialist
<input type="checkbox"/>	Contact Person	Internal Medicine Department	Contract and Grant Specialist, Internal Medicine Department, Medical School
	<input type="button" value="Add"/>	<input type="button" value="Remove"/>	
Reviewers Who Can Sign:	Person	Employer	Title
<input type="checkbox"/>	Reviewer	Internal Medicine Department	Research Process Senior Manager, Internal Medicine Department, Medical School
<input type="checkbox"/>	Reviewer	Students	Chief Department Administrator, Internal Medicine Department, Medical School
	<input type="button" value="Add"/>	<input type="button" value="Remove"/>	
Reviewers:	Person	Employer	Title
<input type="checkbox"/>	Reviewer	Int Med-Cardiology	Contract & Grant Specialist
<input type="checkbox"/>	Reviewer	Internal Medicine Department	Contract and Grant Specialist, Internal Medicine Department, Medical School
	<input type="button" value="Add"/>	<input type="button" value="Remove"/>	
PAF Email Notification:	Person	Employer	Title
<input type="checkbox"/>	Email	Unknown	
	<input type="button" value="Add"/>		
PAN/PAC Email Notification:	Person	Employer	Title
There are no items to display			
	<input type="button" value="Add"/>		
Unit Data Managers:	Person	Employer	Title
There are no items to display			

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.

Note: If the user is not in the system, you may [Create A New User Account...](#)

3

1. To delete a person, select the person
2. Click **Remove**.
3. Click **OK** to save the changes made.