

## **PI & Project Team Home Workspace - Description**

Your Home Workspace is your launch pad for eResearch Proposal Management. It allows you to:

- View information about your Proposal Approval Forms (PAFs)/proposals/projects, track where a proposal/project is in the process, and see items that need action in your Inbox.
- Access projects in order to view documents related to a project. The system not only accomplishes the routing and approval tasks, it also provides document storage and access for those project team members and unit administrators who have some relationship to the project.

## eResearch Home Workspace

The screenshot displays the eResearch Proposal Management Sandbox interface. At the top, the navigation bar includes the eResearchM logo and the text 'Proposal Management Sandbox'. On the right, there are links for 'Pat Admin | My Home | Clipboard | Logoff'. Below the navigation bar, the page is titled 'All PAFs' and 'Folder for Pat Admin'. A sidebar on the left (labeled 'A' and 'B') contains an 'Announcement' box, 'Roles' (PI & Project Team, Reviewer), and 'Support Links'. The main content area (labeled 'C') features a tabbed interface with 'Inbox' selected. It shows three sections: 'PAFs with Required Action' with two entries, 'Hardships with Required Action' which is empty, and 'PAFs Not Yet Signed by PI' with one entry. Each section includes a filter by ID and a table with columns for ID, Name, Date Modified, State, PI, Dept, Sponsor, and Deadline.

<b>A</b>	Announcements are posted on the workspace to alert you of recent news, functionality changes, and other general information.
<b>B</b>	<p>Your available roles appear.</p> <ul style="list-style-type: none"> <li>• If you have multiple roles (e.g., PI &amp; Project Team and Reviewer), click the role name to switch between roles. Your active role appears in bold.</li> <li>• The role selected determines what is displayed in your Home Workspace. E.g., in the screen shot above PI &amp; Project Team is bold and this is the role used to create PAFs.</li> </ul>
<b>C</b>	<p>Tabs organize your Home Workspace into the following sections:</p> <ul style="list-style-type: none"> <li>• <b>Inbox</b> – Displays PAFs/proposals that require action by you or your unit.</li> <li>• <b>In Progress</b> – Displays all of your PAFs/proposals that are currently in progress. These could be PAFs that are still being completed, PAFs routed for unit review, or PAFs being reviewed by DRDA.</li> <li>• <b>Finalized Proposals</b> – Displays all PAFs with finalized proposals.</li> <li>• <b>Submitted to Sponsor</b> – Displays all proposals submitted to a sponsor.</li> <li>• <b>Award Received</b> – Displays all proposals that have received an award from a sponsor, but have not been fully processed by DRDA and Financial Operations.</li> <li>• <b>Active</b> – Displays all projects that have had their award processed and are active in the general ledger.</li> <li>• <b>Closed</b> – Displays projects that have concluded and have been closed.</li> <li>• <b>Cancelled</b> – Displays PAFs/proposals that have been cancelled prior to submission to sponsor.</li> <li>• <b>Not Funded</b> – Displays submitted proposals that were not funded by the sponsor or withdrawn by the PI.</li> </ul>

## eResearch Home Workspace

The screenshot displays the eResearch Proposal Management Sandbox interface. On the left, a sidebar contains an announcement, roles (PI & Project Team, Reviewer), and support links. The main area features a navigation bar with tabs: Inbox, In Progress, Finalized Proposals, Submitted to Sponsor, Award Received, Active, Closed, Cancelled, and Not For. Below this, there are four sections for PAFs (Project Action Forms) with required actions:

- PAFs with Required Action (H):** A table listing PAFs with columns for ID, Name, Date Modified, State (G), PI, Dept, and Sponsor. Two entries are visible: PAF01753 (Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2) and PAF00809 (New horizons in nanospheres-revised title).
- Hardships with Required Action (I):** A table with columns for ID, Name, Date Modified, State, PI, Dept, and PR. It currently displays "There are no items to display".
- PAFs Not Yet Signed by PI (J):** A table with columns for ID, Name, Date Modified, State, PI, Dept, and Sponsor. It displays one entry: PAF01753 (Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2).
- PAFs Assigned to You for Ad Hoc Review (K):** A table with columns for ID, Name, Date Modified, State, PI, Dept, Sponsor Deadline, and Sponsor. It currently displays "There are no items to display".

Additional callouts include:
 

- D:** Create New PAF button.
- E:** Create New User button.
- F:** Link to learn what's new in eRPM.
- L:** Filter by dropdown menu.

<b>D</b>	<b>Create New PAF</b> – Activity used to create a new PAF.
<b>E</b>	<b>Create New User</b> – Use to create eResearch Proposal Management account in order to add person to a PAF (e.g., need to add account for PI or Research Administrator).
<b>F</b>	<b>Projects/PAFs/Proposals</b> are listed in your Home Workspace. You can click on the link to access its Project Workspace. You can sort your list by various headers.
<b>G</b>	<b>State</b> – Location where the proposal is in the process, e.g., Proposal Preparation, Unit Review, DRDA Review.
<b>H</b>	<b>PAFs with Required Action</b> – Displays all PAFs that you still need to do something with (e.g., completing PAF, make changes & submit changes, route for approval, etc.)
<b>I</b>	<b>Hardships with Required Action</b> – Displays all proposals with hardship request that require action.
<b>J</b>	<b>PAFs Not Yet Signed by PI</b> – Displays all PAFs that have not yet been signed by UM Principal Investigator. PAF Can appear in both PAFs with Required Action & PAFs Not Yet Signed by PI. Use this to quickly find a list of PAFs where UM PI still needs to sign Conflict of Interest Statement/PAF.
<b>K</b>	<b>PAFs Assigned to You for Ad Hoc Review</b> – Displays all proposals that you have been assigned to as an Ad Hoc reviewer. You do not have authority to sign/approve proposal, but can enter comments. Only Reviewers can assign Ad Hoc review rights to a proposal.
<b>L</b>	<p><b>Filter by</b> – Allows you to search for proposals by ID (DRDA Number), name, state, UM Principal Investigator or department. You select a <b>Filter by</b> criteria, enter a keyword in the field, and click <b>Go</b>.</p> <p><b>Tips:</b></p> <ul style="list-style-type: none"> <li>Use a percent sign as a wildcard (%). E.g., %Review will return all PAFs that are in the states of Unit Review and DRDA Review</li> <li>Clicking <b>Advanced</b> allows 2 more filter by criteria.</li> </ul>

## eResearch Home Workspace

eResearchM Proposal Management Sandbox
Pat Admin | My Home | Clipboard | Logoff

All PAFs **N**
**O**
**P**

Folder for Pat Admin

**Announcement**

The eRPM Sandbox is a training/testing environment.

No emails are sent from the sandbox. PAFs created in the sandbox cannot be copied to the production environment.

[Learn what's new in eRPM...](#)

**Roles**

PI & Project Team  
Reviewer

[Create New PAF](#)

[Create New User](#)

**Support Links** **M**

[Blue Pages](#)

[Need Training?](#)

[Share Feedback](#)

[Sandbox Updates](#)

**Inbox** | In Progress | Finalized Proposals | Submitted to Sponsor | Award Received | Active | Closed | Cancelled | Not Fur

**PAFs with Required Action**

Filter by ID    [Advanced](#)

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline	Sponsor
09-PAF01753	Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2	4/29/2009 11:19 AM	Proposal Preparation	Primary Investigator	Mechanical Engineering			DARPA
09-PAF00809	New horizons in nanospheres-revised title	2/13/2009 2:17 PM	Unit Review - Project Team Making Changes	Primary Investigator	Mechanical Engineering	6/1/2009		National Science Foundatio

**Hardships with Required Action**

ID	Name	Date Modified	State	PI	Dept	PR
There are no items to display						

**PAFs Not Yet Signed by PI**

Filter by ID    [Advanced](#)

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline	Sponsor
09-PAF01753	Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2	4/29/2009 11:19 AM	Proposal Preparation	Primary Investigator	Mechanical Engineering			DARPA

**PAFs Assigned to You for Ad Hoc Review**

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline	Sponsor
There are no items to display								

<b>M</b>	<b>Support Links</b> – Provides links to support resources and materials.
<b>N</b>	<b>All PAFs</b> – Displays all of your PAFs/proposals in any state.
<b>O</b>	<b>My Home</b> – Allows you to return to the first page of your Home Workspace from any page in the system.
<b>P</b>	<b>Logoff</b> – Allows you to exit eResearch.