

PAF/Project Workspace - Description

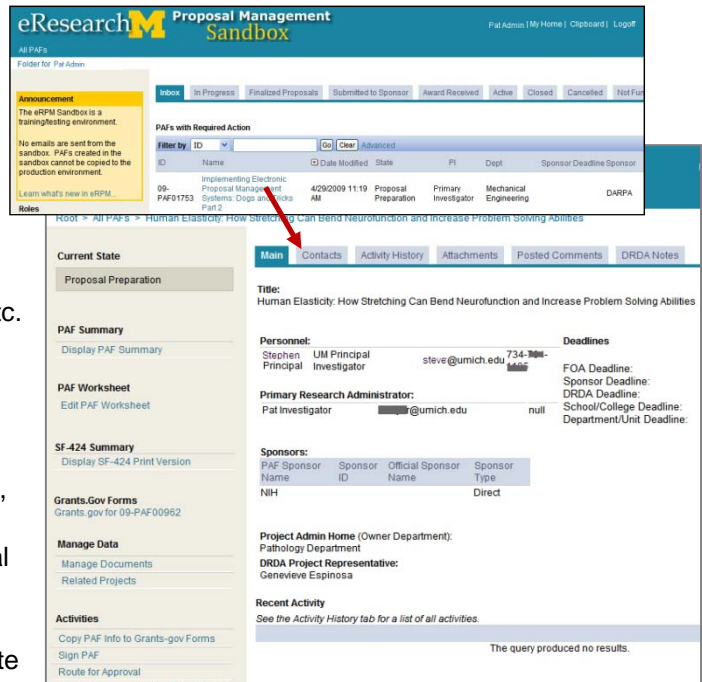
How Do I Get to the PAF/Project Workspace?

Click on the name of the PAF/Project from your Home Workspace to view its PAF Workspace.

PAF/Project Workspace

Available for a PAF after it is created. Use it to:

- **View information**
 - PAF/proposal: E.g., basic information, reviewers, activity history, comments, etc.
 - Project: E.g., award information, award documents
- **View Current State** of PAF/proposal/project.
 - Where it is in the proposal process
 - E.g., Proposal Preparation, Unit Review, etc.
- **Complete activities** related to the PAF/proposal
 - Do something with PAF
 - E.g., Edit PAF Worksheet, Sign PAF/Conflict of Interest Statement, Route for Approval, etc.



Who Can View the PAF/Project Workspace & PAF Worksheet?

PAFs/proposal packages/projects in eResearch can be viewed by:

- Key Personnel (UM Principal Investigator, Sponsor Principal Investigator, Participating Investigators) listed on PAF
- Administrative Personnel listed on PAF
- Reviewers (departments with personnel, cost sharing, space, other commitments, subprojects/grants, administrative home for a project)
 - Reviewers & Reviewers Who Can Sign (Approvers) are set-up & maintained individually by each department.

Who Can Edit the PAF/Project Worksheet?



Key Personnel & Administrative Personnel with Edit rights can edit the PAF Worksheet.

Note: Reviewers can make or request changes once a PAF is in Unit Review.



Important Information

What can be viewed in the PAF Workspace depends on the PAF's location in the routing and approval process (State). This document shows examples of:

• Proposal Preparation	2
• Unit Review	5
• Active	6

PROPOSAL PREPARATION STATE

Before a PAF is routed for approval it is in the Proposal Preparation State.

PAF Workspace – Proposal Preparation State

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes 'Pat Investigator | My Home | Logoff'. The breadcrumb trail is 'Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. The main content area is divided into a left sidebar and a main panel. The sidebar contains sections: 'Current State' (with 'Proposal Preparation' selected), 'PAF Summary' (with 'Display PAF Summary'), 'PAF Worksheet' (with 'Edit PAF Worksheet'), 'SF-424 Summary' (with 'Display SF-424 Print Version'), 'Grants.Gov Forms' (with 'Grants.gov for 09-PAF00962'), and 'Manage Data'. The main panel has tabs for 'Main', 'Contacts', 'Activity History', 'Attachments', 'Posted Comments', and 'DRDA Notes'. The 'Main' tab is active, displaying: 'Title: Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities', 'DRDA #: 09-PAF00962', 'Personnel' (Stephen UM Principal, Investigator, steve@umich.edu, 734-764-1425), 'Deadlines' (FOA Deadline, Sponsor Deadline: 6/1/2009, DRDA Deadline, School/College Deadline, Department/Unit Deadline), 'Primary Research Administrator: Pat Investigator, @umich.edu, null', 'Sponsors' table (PAF Sponsor Name: NIH, Sponsor ID, Official Sponsor Name, Sponsor Type: Direct), and 'Project Admin Home (Owner Department): Pathology Department'.

A	<p>Current State – Displays the location of the proposal in the routing and approval process. States to pay attention to include:</p> <ul style="list-style-type: none"> • Proposal Preparation: PAF/proposal is in this state when being completed by PI & Project team. • Unit Review: Proposal has been routed to units for review. • DRDA Review: Proposal being reviewed by DRDA. • DRDA Approved: Awaiting Final Proposal: Proposal approved by DRDA. UM PI or Primary Research Administrator must finalize the proposal before it can be submitted by DRDA or the submission logged by the Project Team. • Submitted to Sponsor: Proposal submitted to sponsor by PI/Project Team or DRDA. • Active: Project active and you can view award information.
B	<p>Display PAF Summary – Displays all information entered on individual pages of PAF Worksheet in a printer friendly version.</p>
C	<p>Edit PAF Worksheet – Allows you to make changes to the PAF.</p>

PAF Workspace – Proposal Preparation State

D	<p>SF-424 Summary – Displays a printer friendly version of all information currently entered on Grants.gov forms.</p> <p>After the Grants.gov forms are complete, successfully validated, and a PDF version generated, you can review all information entered on Grants.gov forms and attached documents. Treat this as a review copy. It is not a preview of what will be submitted. The actual data & attachments are submitted.</p>
E	<p>Grants.Gov Forms – If you have been given rights to view Grants.gov forms, you will see this link. In order to edit Grants.gov forms, you must be given rights to Read (view) & Edit the Grants.gov forms.</p>
F	<p>Activities – Displays activities that can be completed. Activities available are based on:</p> <ul style="list-style-type: none"> • State of the PAF/proposal (E.g., once route PAF for approval, the PI/Project team is given the option to make changes to the PAF) • Your role (E.g., only the UM Principal Investigator has the option to the Sign the PAF.)
G	<p>Tabs organize the PAF Workspace into the following sections:</p> <ul style="list-style-type: none"> • Main – Displays contact information for PIs, Sponsor PI, the Primary Research Administrator, and the Direct Sponsor. See the next page for more information about the fields on this tab. • Contacts – Displays contact information for Project Personnel, DRDA Project Representative and Administrative Staff. • Activity History – Displays a complete list of the Activities executed on the PAF once the PAF has been routed for approval. • Attachments – Displays the documents that are attached to the PAF/proposal/project. • Posted Comments – Displays comments that are attached to the PAF. These comments are permanent and visible to any person added as key personnel or administrative personnel or the PAF or who has Reviewer access to proposal/project.

PAF Workspace – Proposal Preparation State

H	Title – Displays the project title as entered on the first page of the PAF.
I	PAF ID (DRDA Number) – Displays the PAF ID (DRDA number) that is assigned when the PAF is created. You may see 2 different DRDA formats. Formats for proposals created in eResearch FY-PAF12345 FY-PAF12345-PRE (pre-proposals).
J	Personnel - Displays the contact information for all UM and Sponsor PIs.
K	Deadlines – Displays the deadlines that were entered on the PAF.
L	Sponsors – Displays the direct & prime sponsor information.
M	Project Administrative Home – Displays the Department that is the Project Administrative Home. Clicking on the department name displays contact information.
N	DRDA Project Representative – Displays the Project Representative.
O	Recent Activity – Displays the last 10 activities executed on the PAF including comments, who performed the activity and when the activity occurred. For a complete list, see the Activity History tab.
P	My Home – Allows you to return to your Home Workspace.
Q	Logoff – Allows you to exit eResearch Proposal Management.

UNIT REVIEW STATE

After a PAF is routed for approval, it is in the Unit Review state. It will remain in Unit Review until all required departments approve the PAF.

The workspace content is expanded to include additional information.

PAF Workspace – Unit Review State

R	View PAF Worksheet – the PAF is in a non-editable state (e.g., Unit Review) & worksheet is read-only.
S	Manage Data – Certain data can be managed without putting the PAF into an editable state by: - anyone with permissions to edit the PAF - or Reviewers from the Administrative Home for the PAF.
T	Additional tabs: Change Tracking – Displays a log of all change activities, the name of the person who made the change, and date of the change activity. Unit Comments – Place for Unit Reviewers to list comments. Only Reviewers from the same unit can view these comments.
U	Routing and Approval Status - Displays all Units that are required to review. Contact information for the Unit can be viewed by clicking the name of the Unit in the list.
V	DRDA Approval Status - DRDA approval status is displayed. This will be populated after the proposal moves out of the Unit Review state and into the DRDA review states. The DRDA approval will be displayed here along with date approved and any pertinent notes.

ACTIVE STATE

After a project as activated, the main workspace information displayed changes.

Project Workspace – Active State

A	Title – Displays the project title as entered on the first page of the PAF.
B	PAF ID (DRDA Number) Note: You may see 2 different DRDA number formats. All proposals that were created/entered in eRPM have the new DRDA number format: FY-PAF12345 e.g., 09-PAF12345
C	UM Principal Investigator - Who received the award and date when processed.
D	Administrative Home - for the project.
E	Post Award - Contact for the award.
F	DRDA Project Representative - Contact for the award.

Project Workspace – Active State (Continued)

<p>PAF Worksheet View PAF Worksheet</p> <hr/> <p>Manage Data Change Primary Research Administrator Manage Administrative Personnel Related Projects</p>	<p>Primary Post-Award Contact: Pat Administrator 734-555-5555 admin@umich.edu</p> <p>DRDA Project Representative: Project Repr , 734-555-5555 pr@umich.edu</p> <p>G Project/Grant Coordinator: P Coordinat , 734-555-5555 coord@umich.edu Project Type: Contract Project Class: On-Campus Research (22000)</p> <p>H Project Period: 12/12/2008 to 12/31/2009 Project Period Estimated Award: \$75,020.00 Proposal Has UM Cost Sharing: no</p> <p>I Project Sponsors:</p> <table border="1"> <thead> <tr> <th>PAF Sponsor Name</th> <th>Sponsor ID</th> <th>Official Sponsor Name</th> <th>Sponsor Type</th> </tr> </thead> <tbody> <tr> <td>Pig E Bank</td> <td>909300</td> <td>National Science Foundation</td> <td>Direct</td> </tr> </tbody> </table> <p>J Sponsor Acknowledgement Number:</p> <p>K Award Notices:</p> <table border="1"> <thead> <tr> <th>Notice ID</th> <th>Change Type</th> <th>Date Created</th> <th>PR Approved?</th> <th>Sent?</th> </tr> </thead> <tbody> <tr> <td>[View] F015349-1</td> <td>Project Award Notice</td> <td>12/12/08</td> <td>yes</td> <td>no</td> </tr> </tbody> </table> <p>L Project/Grants:</p> <table border="1"> <thead> <tr> <th>PGN</th> <th>Short Code</th> <th>CS Short Code</th> <th>Is Parent PGN</th> </tr> </thead> <tbody> <tr> <td>C208830</td> <td></td> <td></td> <td>yes</td> </tr> </tbody> </table> <p>Recent Activity</p>	PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type	Pig E Bank	909300	National Science Foundation	Direct	Notice ID	Change Type	Date Created	PR Approved?	Sent?	[View] F015349-1	Project Award Notice	12/12/08	yes	no	PGN	Short Code	CS Short Code	Is Parent PGN	C208830			yes
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C208830			yes																								

G	Project/Grant Coordinator
H	Project Type, Project Class, Project Period, Estimated Award, Proposal Has UM Cost Sharing
I	Project Sponsors
J	Sponsor Acknowledgement Number
K	<p>Award Notices – Click link to view PAN or PAC</p> <p>Notice ID</p> <ul style="list-style-type: none"> • Format: Project grant number (PGN) - 0 e.g., F123456-0 • Any PAN sent between January 5 – February 24, 2009 has the following format: PGN -1. • Based on user feedback the Notice ID for PANs was changed to PGN-0 in order to accommodate the standard PAC numbering sequence. • PACs will increment the Notice ID. First PAC is: PGN-1 e.g., F123456-1 Second PAC is: PGN-2 e.g., F123456-2
L	Project/Grants