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
- Unit Review
- Active
# PROPOSAL PREPARATION STATE

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

## PAF Workspace – Proposal Preparation State

![PAF Workspace](image)

A **Current State** – Displays the location of the proposal in the routing and approval process. States to pay attention to include:

- **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.
- **ORSP Review**: Proposal being reviewed by ORSP.
- **Submitted to Sponsor**: Proposal submitted to sponsor by PI/Project Team or ORSP.
- **Active**: Project active and you can view award information.

B **Display PAF Summary** – Displays all information entered on individual pages of PAF Worksheet in a printer friendly version.

C **Edit PAF Worksheet** – Allows you to make changes to the PAF.
PAF Workspace – Proposal Preparation State

D 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 Grants.gov forms.

E SF-424 Summary – Displays a printer friendly version of all information currently entered on Grants.gov forms. 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. Documents are not interleaved in proper order, but will be submitted in correct order.

F Activities – Displays activities that can be completed. Activities available are based on:
- 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 Tabs organize the PAF Workspace into the following sections:
- **Main** – Displays contact information for PIs, Sponsor PI, the Primary Research Administrator, and the Direct Sponsor. See below for more information about the fields on this tab.
- **Contacts** – Displays contact information for Project Personnel, 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.
- **Hardships** – Displays any Hardships associated with the PAF/proposal/project.
- **Subcontracts** – Displays any Subcontracts (SUBKs) associated with the PAF/proposal/project.
- **Posted Comments** – Displays comments that are attached to the PAF. These comments are permanent and visible to anyone added as key personnel or administrative personnel or the PAF or have Reviewer access to proposal/project.
# PAF Workspace – Proposal Preparation State

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>H</strong> Title</td>
<td>Displays the project title as entered on the first page of the PAF.</td>
</tr>
<tr>
<td><strong>I</strong> PAF #</td>
<td>Displays the ORSP number that is assigned when the PAF is created. You may see 2 different PAF # formats for proposals created in eResearch:</td>
</tr>
<tr>
<td></td>
<td>- FY-PAF12345</td>
</tr>
<tr>
<td></td>
<td>- FY-PAF12345-PRE (pre-proposals)</td>
</tr>
<tr>
<td><strong>J</strong> Personnel</td>
<td>Displays the contact information for all UM and Sponsor PIs.</td>
</tr>
<tr>
<td><strong>K</strong> Deadlines</td>
<td>Displays the deadlines that were entered on the PAF.</td>
</tr>
<tr>
<td><strong>L</strong> Project Administrative Home</td>
<td>Displays the Department that is the Project Administrative Home. Clicking on the department name displays contact information.</td>
</tr>
<tr>
<td><strong>M</strong> Project Representative</td>
<td>Displays the (ORSP) Project Representative.</td>
</tr>
<tr>
<td><strong>N</strong> Sponsors</td>
<td>Displays the direct &amp; prime sponsor information.</td>
</tr>
<tr>
<td><strong>O</strong> Recent Activity</td>
<td>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.</td>
</tr>
<tr>
<td><strong>P</strong> My Home</td>
<td>Allows you to return to your Home Workspace.</td>
</tr>
<tr>
<td><strong>Q</strong> Logoff</td>
<td>Allows you to exit eResearch Proposal Management.</td>
</tr>
</tbody>
</table>

Last updated: 4/1/2013
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**

| P | View PAF Worksheet – the PAF is in a non-editable state (e.g., Unit Review) & worksheet is read-only. |
| Q | 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. |
| R | Additional tab: Change Tracking – Displays a log of all change activities, the name of the person who made the change, and date of the change activity. |
Sponsors – Displays Names and Types of Sponsors associated with the PAF/proposal/project.

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.

ORSP Approval Status - ORSP approval status is displayed. This will be populated after the proposal moves out of the Unit Review state and into the ORSP review states. The ORSP approval will be displayed here along with date approved and any pertinent notes.
ACTIVE STATE

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

**Project Workspace – Active State**

A **Title** – Displays the project title as entered on the first page of the PAF.

B **Project Personnel / Project Info** – Displays contact info for key project personnel and key information related to the project/award.

C **Project Sponsors / Sponsor info** – Displays project sponsors and other sponsor information.
### Project Workspace – Active State (Continued)

**D Award Notices** – Displays all PANs and PACs associated with the project. Click the **Notice** link to view the associated PAC or PAN.

**E Project/Grants** – Click the PGN Summary link to view the associated project/grant.

**F Recent Activity**

**G Approval Activities**