

<http://eresearch.umich.edu>

Need Help?

Project information, FAQs, Contact Us link
<http://www.umich.edu/~eresinfo/pm.html>

Training (Online training, step-by-step procedures)
<http://www.umich.edu/~eresinfo/erpm/training.html>

Sandbox (System practice environment)
<http://www.umich.edu/~eresinfo/erpm/sandbox.html>

ITS Service Center (Technical support e.g., navigation, connectivity, system errors)
Phone: (734) 764-4357 (4-HELP) **Email:** 4HELP@umich.edu
<http://its.umich.edu/help/>

ORSP Project Representatives
<http://orsp.umich.edu/orsp-staff>
Phone: (734) 764-5500 **Email:** umresearch@umich.edu

Login from eResearch Homepage

- Go to <http://eresearch.umich.edu>.
- Click **Login** in the Proposal Management box.
- Enter your Login ID (username or Friend ID) and your password.
- Click **Login**. Your Home Workspace opens.



TIPS:

- If you need a Login ID, click **create one now**.
- Problems with your Login ID or password? Contact the ITS Service Center

Important! Enable pop-ups from <http://erpm.umich.edu/erpm> in order to use all features of eResearch.

Create New PAF

If you have multiple roles, select **PI & Project Team**.



Question Types

*** Required to Save =** Must answer before page can be saved.

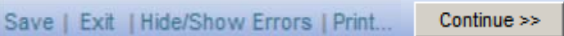
*** (Red Asterisk) =** Must answer before route for approval.

No asterisk = Not required by system. Check with your unit for their policy/requirements.

- From your Home Workspace, click **Create New PAF**.
- Complete all questions on the first page that are marked ***Required to Save**.
- Click **Continue** to save the current page and move to the next page.

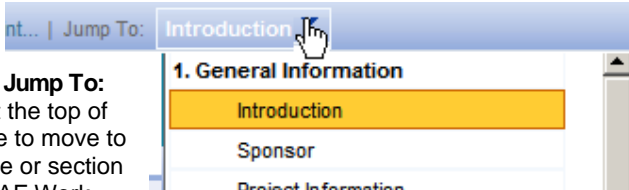
Navigation

Important! Use navigation within eResearch & not your Web browser Navigation (back & forward buttons). Web browser navigation causes errors and you may lose your work.



- Save** - Saves current page.
- Exit** - Returns you to PAF Workspace.
- Hide/Show Errors** - Checks that all fields required to route the PAF for approval are complete.
- Print** - Prints individual page of PAF Worksheet.
- Continue** - Saves the PAF & moves you to the next page.

Using Jump To



Use the **Jump To:** menu at the top of the page to move to any page or section of the PAF Worksheet (including back).

Recommendation: Complete UM Investigators page before using Jump To.

Add UM Investigators

- Click **Add** (not shown).
- Enter username or last name.** Click the desired name from the list that appears or see below for **User Not Found?**
- Select the **Role**.
- Enter **Sponsor Role** if applicable.
- Select if **Senior/Key**
- Select **edit rights** to PAF and/or Grants.gov forms.
 Note: Read rights need to be assigned for Grants.gov forms.
- Click **Save**. Note: Click **Cancel** to reset fields.
- Click **Add Appointments**

TIP: To learn about UM roles, go to: <http://orsp.umich.edu/principal-investigator-pi>

- Select the applicable appointment option:
 - For Appointments From HR System, click **Add to PAF**.
 - For Future Appointments, enter **Title** and **Department ID** and click **Add to PAF**.
- Click **OK**.

User Not Found?

- Click **arrow** next to **User not found?**
- Follow suggested search tips.
- If user is not found, click **Create Account**.

- Select **Search Type**.
- Enter **Name**.
- Click **Search**.
- Click the person's **Uniquname**.
- Click **Save**.

TIP: Use **Not Currently Associated with UM** to create an eResearch Account for a person NOT associated/affiliated with UM. He/she will also need a Friends Account created.

Working with PAFs

Delete Lines (E.g., People, Rooms)

1. Select line to delete.

PAF	Delete	Name	Roles	Edit Rights	Appointments
<input type="checkbox"/>	Edit	Linda Forsyth	LIM LIM Principal Investigator	PAF: <input type="checkbox"/>	211000, Administration Add Appointments
<input checked="" type="checkbox"/>	Edit	Jan Marten	UM LIM Principal Investigator	PAF: <input checked="" type="checkbox"/>	Add Appointments

2. Click **Delete**.

Review & Print PAF

1. Click **Display PAF Summary** on the PAF Workspace.
2. You see all of the information entered on PAF Worksheet in a printer friendly version.
3. Click **Print**.

TIP: From the PAF Summary:

- **UM Principal Investigator** can sign PAF/Conflict of Interest Statement
- **Reviewers** can Request or Make Changes.

Working with Documents

Attach Document

1. Click **Browse** to locate the document on your computer.
2. Select the file to upload and click **Open**.
3. Optional, enter a **Title** for the document.
4. Select **Type**.

Note: Only when uploading Supporting Documents will you have a choice of different document types. Otherwise it matches the section you are completing.

Upload New Document Version

1. Click **Browse** in the existing document line to locate the document on your computer.
2. Select the file to upload and click **Open**.
3. Optional, enter a **Title** for the document.
4. Verify **Type**.
5. Click **Attach**.
6. Verify the version number change.

File	Version	Browse	Title	Type
<input type="text"/>	<input type="text"/>	Browse...	<input type="text"/>	Research Plan Attach
<input type="checkbox"/> Delete	budget.xls	0.01 Browse...	Budget	Budget Attach

DOCUMENT TIPS:

- No limit on the number of documents that can be attached.
- Each document cannot be larger than 150MB.
- Documents can be any file type (e.g., .ppt, .xls, .pdf, .doc)
- Mac users make sure you turn on file extensions. Any file uploaded without an extension (e.g., doc) cannot be viewed by others.
- Make sure that others have the program needed to view your document.
- Consider uploading a lower version of file types to ensure everyone can view your document, e.g., upload .doc instead of .docx.

View Document Version History

1. Click the version number (e.g., 0.02) or View Version History icon.
2. Click Uploaded File to view a different version of the file.
3. If you want to revert to an earlier version, save the document to reattach it to replace the current version.
4. Click **OK**.

Delete Document

1. Click **Delete**.
2. Click **OK** in the message box.

Manage Document Security

1. Click the grey padlock next to the document.
2. Uncheck the box in front a name to restrict access.
Note: Cannot remove access from certain people.
3. Click **Submit**.
4. Verify that document security added. Padlock is gold.

Grants.gov in eResearch

Overall Steps

1. Complete Grants.gov information in PAF Worksheet.
Note: Check to see if Grants.gov forms available to be completed in eResearch. Must still complete PAF for internal review even if use other system to submit proposal to Grants.gov.
2. Copy PAF Info to Grants.gov form set.
3. Complete Grants.gov forms.
Note: Access from PAF Workspace.
4. **Validate** Grants.gov forms (checks that all required fields are completed).
Note: See Grants.gov in eRPM procedure to learn
5. Run **Submission Pre-Check** (checks against Grants.gov rules).
6. Generate PDF version to review data & attachments.
7. Finalize for ORSP submission.

Copy PAF Info to Grants.gov Forms

1. For Grants.gov forms that are available in eResearch, from the PAF Workspace click **Copy PAF Info to Grants.gov Forms**.
2. Click **OK**.

Validate Grants.gov Forms

1. Click **Validate Submission** from Grants.gov workspace for your PAF.
Note: Checks that all required fields are completed & creates XML file.
2. If your submission has no errors, the status changes to **Valid for Submission**.
3. If your submission has errors, fix errors and revalidate.

Note: You must validate before you can Run **Submission Pre-check** or **Generate PDF Version**.

Review & Print SF-424 Summary

1. For Grants.gov proposals, from the PAF Workspace click either **Display SF-424 Print Version** or **Display SF-424 PDF Version**.
2. You will see a printer friendly version of all information entered on Grants.gov forms.

Note: To view SF-424 Print or PDF version, user must have Grants.gov read access.

Quick Reference Card for PI/Project Team

Route for Approval

PI Sign PAF and Conflict of Interest (COI)

1. Click the **Sign PAF** activity on the PAF Workspace or PAF Summary.
2. Read the Conflict of Interest statement.
3. Click **Yes** or **No**.
4. Enter **Comments** (required with Conflict of Interest).
5. Read the Sign PAF statement.
6. Select checkbox to **Sign PAF and**

Recommended:
Complete before you route for approval. Many units will not review without UM PI signature.

Tip: After signing, use the Manage Conflict of Interest activity to make

Route for Unit Review & Approval

1. Click the **Route for Approval** activity on the PAF Workspace.
Note: Available only to the UM Principal Investigator and Primary Research Administrator
2. Optional, enter **Comments**.
Note: Comments are required if any PIs have not signed the PAF.
3. Optional, **Add** document(s).
4. Click **OK**.

TIPS:

- Before you route for approval use **Hide/Show Errors** in the PAF Worksheet to check for errors.
- If the departments that need to review the PAF do not look correct, click **Cancel** & double check the PAF Worksheet.

Working with PAFs After Routed for Approval

Make and Submit Changes

Use After: PAF has been routed for approval. (Not needed when still preparing proposal).

1. Click the **Project Team Make Changes** activity on the PAF Workspace.
2. Enter **Comments**.
3. Optional, **Add** documents.
4. Click **OK**.
5. Make changes by editing the PAF Worksheet.
6. Click the **Project Team Submit Changes** activity.
Note: Only the UM PI or Primary Research Administrator can submit changes.
7. If applicable, select the department(s) who requested change.
8. Select **Change Type**.
9. Enter **Comments**.
10. Optional, **Add** documents.
11. Click **OK**.

Note: Use **Comments** to summarize changes made for quick review. See change log for de-

Decline (Requested) Changes

Use when: You are declining changes requested by a reviewer.

1. Click **Decline Requested Changes** activity on the PAF Workspace.
2. Select the Departments whose requests you are declining.
3. Enter **Comments**.
4. Optional, Add **Documents**.
5. Click **OK**.

Request ORSP Action to Make Changes

Use To: Ask ORSP to let you make changes to PAF. (During ORSP Review, After Submitted to Sponsor or Award in Negotiation.)

1. Click the **Project Team Request ORSP Action** activity on the PAF Workspace.
2. Enter **Comments**.
3. Optional, **Add** documents.
4. Click **OK**.
5. If request is allowed, follow the steps for Make and Submit Changes.

PAFs can be cancelled: 1. Prior to ORSP Admin Review
2. After ORSP Admin Review, but prior to submission to sponsor.

Cancel PAF

1. Click the **Cancel PAF** activity on the PAF Workspace.
2. Optional, enter **Comments**.
3. Click **OK**.

Essential PAF Features/Tips

Find PAFs

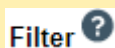
Use to: Search/view all your PAFs/proposals/projects in eResearch.

(You are listed on project or are a Reviewer for a department on project.)

1. Click **All PAFs** from top left corner of the Home Workspace.
2. Select **ID** **2** **Enter text to search** **3** **Go** **4**
Filter criteria.
Note: **ID** = ORSP number,
Name = PAF title.
3. Enter keyword.
4. Click **Go** to display filtered list of PAFs/proposals/projects.
Note: Click **Add Filter** for more criteria.

- Use a percent sign (%) as wildcard character in filtering and searching to specify parts of words. For example, searching for %mot% returns DeMott, Miyamoto, and Mott.

- Click Filter help for more search options.
- Click **Clear All** to reset all filters.



Post a Comment for the Entire Project

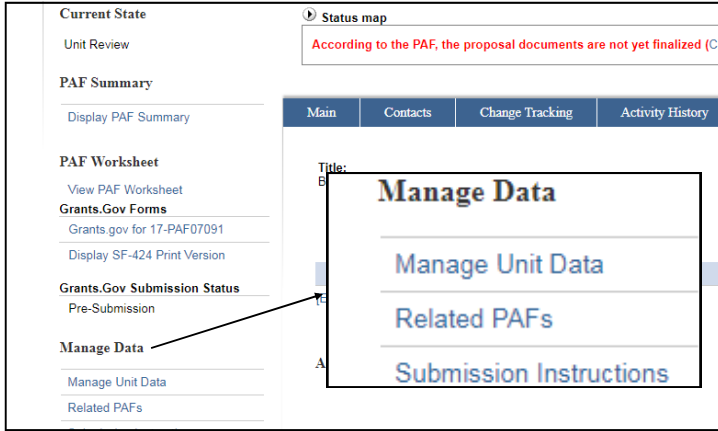
1. Click the **Post a Comment for the Entire Project** activity on the PAF Workspace.
2. Enter **Comments**.
3. Optional, **Add** document(s).
4. Optional, select people to email this comment from the list displayed.
5. Click **OK**.

IMPORTANT! Comments can be viewed by anyone who has access to the project, are permanent, and appear in both the Recent Activity section of the PAF workspace and under the Activity History tab.

Tips—Emails Sent from eResearch

- Add **eresearch@umich.edu** to your address book/contacts so messages are not sent to junk or spam mail.
- **Warning! Plain text email system users e.g., Groupwise!**
 - **Enable html messages** - You must view as html to view links to PAFs/proposals, award documents.
 - Forwarding an email using a plain text email system breaks links to eResearch. Instead, go to eRPM and find proposal/project/award.
- Forwarding an email message does NOT give access to eResearch - Person must be listed on the project or be a Reviewer to have access to view proposal/project/award in eResearch.
- **Warning!** You cannot copy the Award document link and paste it into a web browser. It will not work.

Manage Data



Manage Administrative Personnel

1. Click **Manage Administrative Personnel**.
2. Click **Add**.
3. Enter last name or username.
4. Click **Find**.
5. Select person from the list.
6. Select **Award Type** and **Edit Rights**.
7. Select the **Primary Administrative & Post Award Contacts**.
8. Click **Save**.
9. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

TIP: Use this to delete administrators who no longer support the project.
E.g., if you are getting PAN/PAC notifications for a department where you no longer work, remove yourself as administrative personnel on project from that department.

Finalize for Submission to Sponsor

Confirm that the proposal is in its final form and all associated documents and Grants.gov forms (if applicable) are complete, validated, and ready for submission. ORSP will not submit until finalized. Project Team cannot log submission until finalized.

1. Click **Finalize Proposal for Submission to Sponsor** from the Manage Data menu in the PAF Workspace.
2. Upload **1 PDF** as the final proposal document (unless sponsor has specified other requirements).
Note: If you have uploaded your submission to the sponsor system & cannot upload any documents here, click the checkbox on the top of this page. You will only have this option if you selected "Other online system (e.g. Fastlane)" for question 5.16 Proposal Submission
3. Select the checkbox that your proposal is ready for submission.
4. Click **OK** or **Apply**.
5. Your finalized proposal will appear under the "Finalized Proposals" tab on your Home Workspace.

View Disclosure Information

Click **View Disclosure Information** to see the status of outside interest disclosure and whether or not a conflict of interest exists for anyone with a UM Investigator role on the PAF.

View Disclosure Information					
Name	Role	Has Disclosed?	Has PHS Disclosure?	Has Outside Interest?	Last Certification Date
Scott Pfelecher	UM Principal Investigator				
Brian Chung	UM Sponsor Principal Investigator				
Misa Randolph	Other Non-faculty Investigator		Yes		
Carolyn Pappas	Other Non-faculty Investigator				

Submission Instructions

1. Click **Submission Instructions** on the left side of the PAF Workspace under Manage Data.
2. Select **Submission Method**.
3. Select **Yes** or **No** to question *Will ORSP Submit this Proposal?*
4. Enter **Notes for ORSP**.
5. Select **ORSP Project Representative**.
6. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

Submission

Send to ORSP for Submission to Sponsor

Use when: ORSP is submitting to the Sponsor and final proposal has been uploaded using **Finalize Proposal for Submission to Sponsor** as described above.

1. Click the **Send to ORSP for Submission to Sponsor** activity on the PAF Workspace.
2. Enter **Comments**.
3. Click **OK**.

Log Project Team Submission to Sponsor

Use when: Project Team is submitting to the Sponsor.

1. Click the **Log Project Team Submission to Sponsor** activity on the PAF Workspace.
2. Click **Add**.
3. Enter **Submission Date**.
4. Select **Submission Method**.
5. Optional, enter **Notes, Tracking Number** and **Submission Recipient**.
6. Click **OK**.

Note: You must **Finalize for Submission to Sponsor** before you can log project team submission.

Award Notices

PANs/PACs Sent from eResearch

Project Award Notifications (PANs) & Project Award Change (PAC) notifications are generated from the eRPM system & sent via email to investigators and campus administrators, specifically:

- UM Principal Investigator
- Sponsor Principal Investigator
- Participating Investigators with Specified Effort
- Administrative Contacts (all administrators listed on proposal or project)
- Any person (or group e-mail address) listed as the *PAN/PAC Notifiers* for a unit (department) required to review the PAF.

TIP: Email tips on previous page apply to PANs/PACs sent from eResearch.
Learn more go to: <http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>

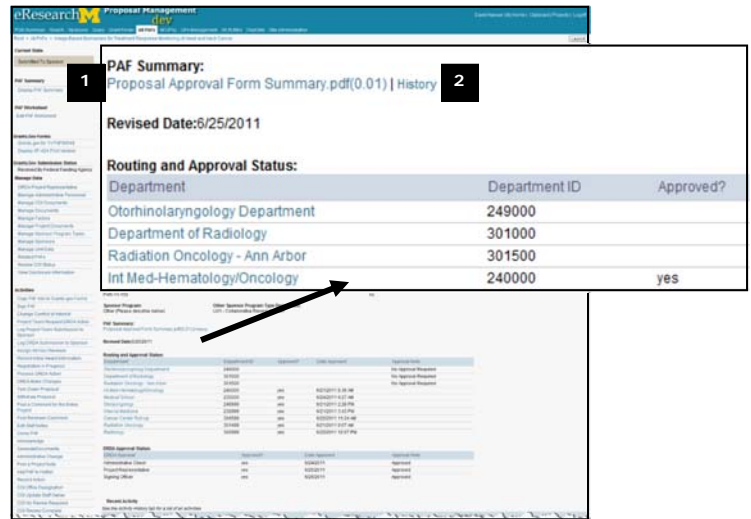
All PANs/PACs are listed on Project Workspace.

- The Notice ID for a PAN is the project grant number (PGN) -0 (e.g., F123456-0)
- Each PAC increments the Notice ID by one number.
 - First PAC is: PGN-1 (e.g, F123456-1), second PAC is: PGN-2 (e.g., F123456-2), etc.

View Previous PAF Versions

A PDF version of the PAF Summary is captured every time the ORSP Project Representative approves the PAF. From the PAF Workspace:

1. Click **Proposal Approval Form Summary** to view the current PDF version.
2. Click **History** to view previous versions.



Additional Information

Search

Search for any PAF where you are listed as PI/Project Team or Reviewer.

1. Click **Search** from your Home Workspace.
2. Select PI/Project Team or Reviewer. Enter the search criteria.
3. Click the **Search** button.
4. To view a PAF returned in the search results, click the PAF name.

Notes:

- Click **Reset Form** to clear all your entries.
- Click **My Home** to return to your Home Workspace.

All My PAFs

Search for all PAFs where you are included as part of UM Investigators or Administrative Personnel.

1. Click **More...** from your Home Workspace, then **All My PAFs**.
2. Select filter criteria.
3. Enter text.
4. Click **Go**.