

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 (MAIS) Help Desk (Technical support e.g., navigation, connectivity, system errors)
 Phone: (734) 764-4357 (4-HELP)
 Hours: Monday-Friday 8:00am-5:00pm

DRDA Project Representatives
<http://drda.umich.edu/contacts/drda/staff.html>
 Phone: (734) 764-5500
 Fax: (734) 763-4053, 764-8510

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:

- You do not need an MToken.
- If you need a Login ID, click **create one now**.
- Problems with your Login ID or password? Go to: <http://www.itd.umich.edu/>

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**.



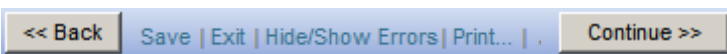
Question Types

- * 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.

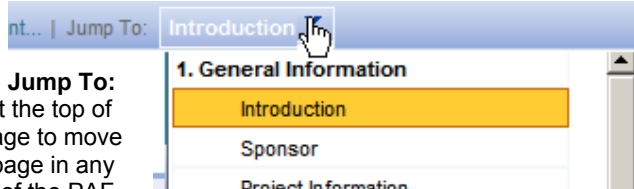
Navigation

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



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

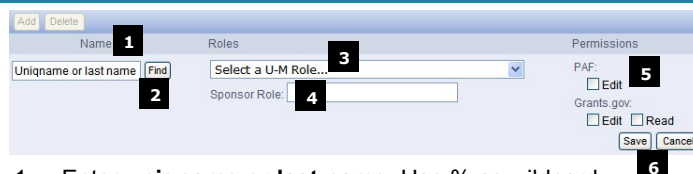
Using Jump To



Use the **Jump To:** menu at the top of each page to move to any page in any section of the PAF Worksheet.

Note: Recommend completing UM Key Personnel before using Jump To.

Add Key and Administrative Personnel



- Enter **username or last name**. Use % as wildcard.
- Click **Find** and click name of person or see below for **User Not Found?** instructions
- Select **UM role**.
- Optional, enter **Sponsor Role**.
- 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://www.drda.umich.edu/proposals/principal_investigator.html

Appointment Details for Maryfran Sowers in PAF

Title	Department ID	Department / Unit
Professor	238000	Int Med-Rheumatology

Add Appointments from HR System

Title	Department ID	Department / Unit	Appointment Info	Job Code Eligibility
PROFESSOR	458000	Epidemiology Department	U-Year Ann Arbor (9/12) - Regular	UM PI Eligible
Professor	238000	Int Med-Rheumatology	Without Salary - Regular	UM PI Eligible

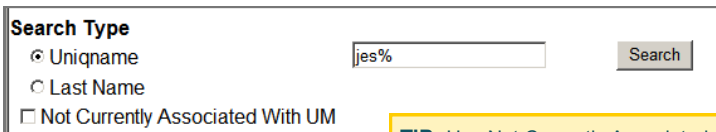
Add Future Appointments

Title	Department ID	Department / Unit

- Add Appointments Options
 - Select Appointments From HR System and click **Add to PAF**.
 - For future appointments, enter **Title** and **Department ID** and click **Add to PAF**.
- Verify that Selected Appointments are listed.
- Click **OK**.

User Not Found?

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



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

Quick Reference Card for PI/Project Team

Working with PAFs

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

1. Select line to delete.

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

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
Delete	budget.xls	0.01	Budget	Budget

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**.

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.

Delete Document

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

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).
5. Run **Submission Pre-Check** (checks against Grants.gov rules).
6. Generate PDF version to review data & attachments.
7. Finalize for DRDA submission.

Note: See Grants.gov in eRPM procedure to learn more.

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.

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**.

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 Conflict of Interest**.

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 changes.

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 details.

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 DRDA Action to Make Changes

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

1. Click the **Request DRDA 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.

Cancel PAF

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

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

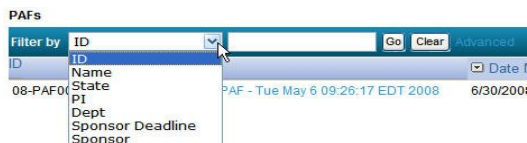
Essential PAF Features/Tips

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 **Filter by** criteria.
Note: **ID** = DRDA number, **Name** = PAF title.
3. Enter keyword.
4. Click **Go** to display filtered list of PAFs/proposals/projects.
Note: Clicking **Advanced** allows 2 more Filter by criteria.



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

Post a Comment for the Entire Project

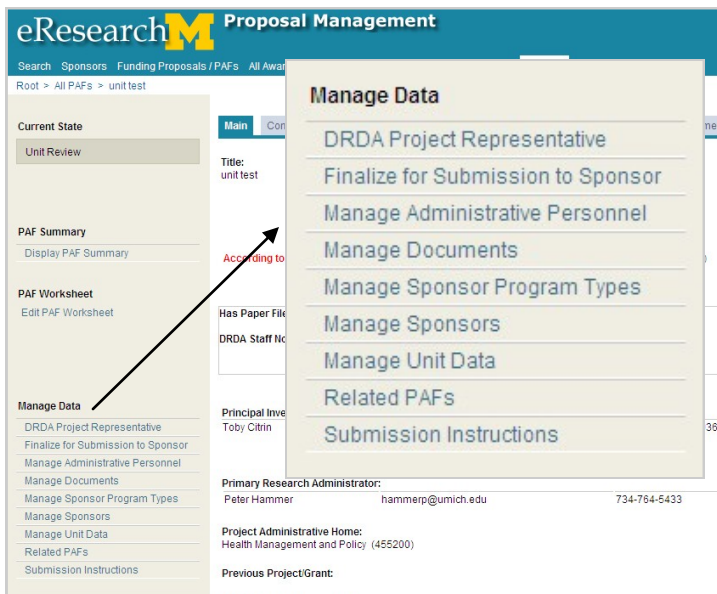
1. Click the **Post a Comment for the Entire Project** activity on the PAF Workspace.
2. Enter **Comments**.
3. Optional, **Add** document(s).
4. Optional, select people to email this comment from the list displayed.
5. Click **OK**.

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** - because eResearch sends 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 system. 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.

Manage Data



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 DRDA Submit this Proposal?*
4. Enter **Notes for DRDA**.
5. Select **DRDA Project Representative**.
6. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

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. DRDA will not submit until finalized. Project Team cannot log submission until finalized.

1. Click **Finalize Proposal for Submission to Sponsor** on the left side of the PAF Workspace under Manage Data.
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 "Electronically via other online system (e.g. Fastlane)" for question 5.15 Submission Methods.
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.

Manage Administrative Personnel

1. Click **Manage Administrative Personnel** on the PAF Workspace under Manage Data.
2. Click **Add**.
3. Enter last name or unickname.
4. Click **Find**.
5. Select person from the list.
6. Select **Award Type** and **Edit Rights**.
7. Select the Primary Administrative and the Post-Award Contacts.
8. Click **Save**.

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.

Submission

Send to DRDA for Submission to Sponsor

Use when: DRDA 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 DRDA 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. Click **Add**.
2. Enter **Submission Date**.
3. Select **Submission Method**.
4. Optional, enter **Notes**, **Tracking Number** and **Submission Recipient**.
5. Click **OK**.

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

Award Notices

PANs/PACs Sent from eResearch

- PAN & PAC award 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) that was required to review the PAF.
- Award Notices (PAN/PAC) Notice ID
 - Notice ID format: PGN-# (Project Grant Number dash number) e.g., F123456-2
- All PANs/PACs listed on Project Workspace
- PAN numbering begins with to PGN-0
 - E.g., F123456-0

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>

Search

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

The screenshot shows the eResearchM Proposal Management search page. At the top, there is a search bar with a 'Search' button (labeled 1) and a dropdown menu for 'All PAFs'. Below the search bar, there are radio buttons for 'PI/Project Team' (labeled 2) and 'Reviewer/Department Notification Recipient'. There are also input fields for 'Project Grant' and 'Short Code'. On the left side, there is a sidebar with 'Announcement' and 'New in eRPM & Tips' sections.

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.

Note:

- Use the **Reset Form** button to clear all of your entries.
- To return to your Home Workspace, click **My Home**.

View Previous PAF Versions

A PDF version of the PAF Summary is captured every time the DRDA Project Representative approves the PAF.

1. To view the current PDF version, click **Proposal Approval Form Summary**.
2. To view previous versions, click the **Revision History** icon.

The screenshot shows the PAF Summary page. At the top, there is a 'DRDA Approval Status' table. Below the table, there is a 'PAF Summary' section with a link to 'Proposal Approval Form Summary.pdf(0.02)' (labeled 1) and a 'View revision history' button (labeled 2). The 'Revised Date' is 8/9/2010. At the bottom, there is a 'Recent Activity' section.

DRDA Approval Status:		
DRDA Approval	Approved?	Date Approved
Administrative Check	yes	8/9/2010
Project Representative	yes	8/9/2010
Signing Officer	yes	8/9/2010

PAF Summary:
[Proposal Approval Form Summary.pdf\(0.02\)](#)  **View revision history**
 Revised Date:8/9/2010
 Recent Activity