



**eResearch Proposal Management (eRPM)
Pilot Conference Call**

March 30, 2009

- Introductions
- Announcements
- Status of Pilot Projects
- Issues found
- Additional comments from pilot participants
- Questions & answers

- During the eRPM Pilot (from 11/17/08 – 3/29/09):
 - 39 pilot proposals created in eRPM
 - 37 submissions
 - 14 Grants.gov system to system submissions

- New Question – Supporting Information Section Routing Instructions page
 - If not all documents associated with this proposal have been finalized, please answer no to question 5.17.
 - DRDA cannot submit until proposal finalized.
 - Answering YES to question 5.17 indicates to DRDA that the proposal is final and can be submitted at any time after unit approvals are complete.
 - You can manage this page after you route for approval by executing the Finalize Proposal for DRDA activity in the Manage Data section of the PAF Workspace.
 - Even if you validate SF424 (Grants.gov) forms still must finalize

5.17 Are your proposal documents finalized and ready to be submitted to the sponsor? * Required to Save

Yes No Clear

? HELP

Include any special handling instructions in the space provided. Assists DRDA in processing your proposal.

- If answer yes to 5.17, have option to upload final proposal documents.
- Checkbox allows you to note if uploaded to sponsor system & cannot upload any documents here.

eResearch **M** Proposal Management **test** Edit: PAF - 09-PAF00714

Save | Exit | Hide/Show Errors | Print... | Jump To: Final Proposal ▾ Continue >>

6. Proposal

Final Proposal

You have indicated in question 5.17 on the Routing Instructions page that your proposal documents are finalized and ready to be submitted to the sponsor. Please upload your finalized documents here.

If not all documents associated with this proposal have been finalized, please change your answer to question 5.17. You can upload these documents later by executing the *Finalize Proposal for DRDA* activity in the Manage Data section of the PAF Workspace.

If you are completing Grants.gov forms in eResearch, you do not need to upload any documents here.

Please note that by answering YES to question 5.17 and uploading any documents here, you are indicating to DRDA that the proposal is final and can be submitted at any time after unit approvals are complete.

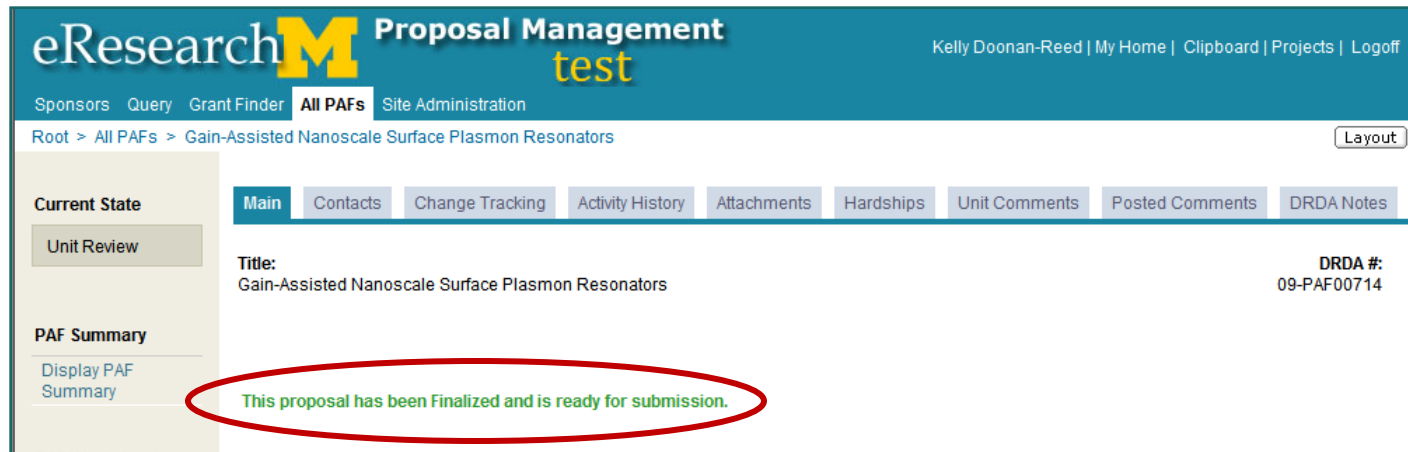
Check here to indicate that the Final Proposal has been uploaded to the sponsor's system and you are unable to upload any Final Proposal documents here.

[? HELP](#)

6.1 Final Proposal: *

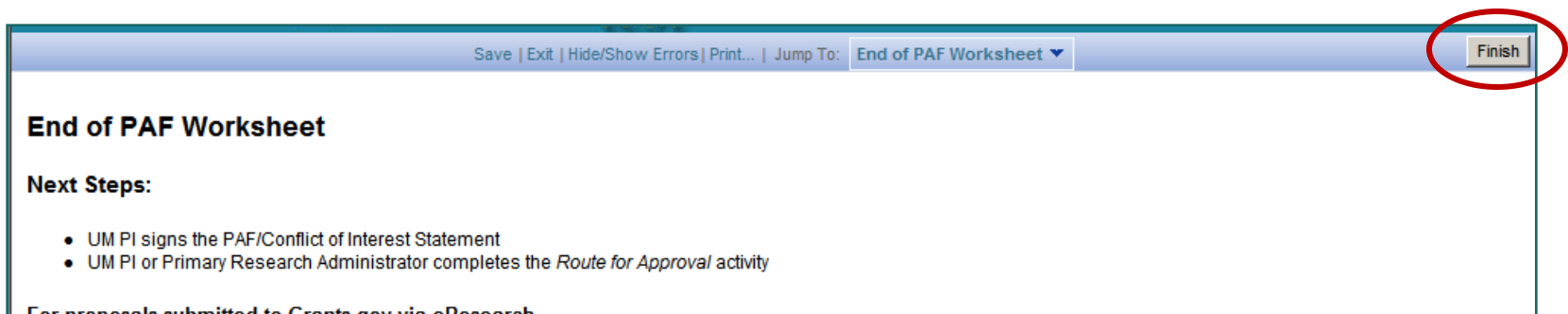
eResearch^M Finalize Proposal – New As of 3/30

- After proposal has been finalized for DRDA submission, “This proposal has been finalized and is ready for submission.” appears in PAF workspace. Anyone with access to the proposal can view this message.



The screenshot shows the eResearch Proposal Management interface. The header includes the eResearch^M logo and the text "Proposal Management test". The user is logged in as Kelly Doonan-Reed. The main navigation bar shows "All PAFs" selected. The breadcrumb trail is "Root > All PAFs > Gain-Assisted Nanoscale Surface Plasmon Resonators". The "Current State" section shows a "Main" tab selected, with other tabs for "Contacts", "Change Tracking", "Activity History", "Attachments", "Hardships", "Unit Comments", "Posted Comments", and "DRDA Notes". The "Title" is "Gain-Assisted Nanoscale Surface Plasmon Resonators" and the "DRDA #" is "09-PAF00714". A green message "This proposal has been Finalized and is ready for submission." is circled in red.

- Tip: If filling out the proposal with completed & final proposal, make sure you click the finish button on the last page, to properly update that your proposal is ready.



The screenshot shows the "End of PAF Worksheet" page. The top navigation bar includes "Save | Exit | Hide/Show Errors | Print... | Jump To: End of PAF Worksheet". The "Finish" button is circled in red. Below the header, the text "End of PAF Worksheet" is displayed. Under "Next Steps:", there are two bullet points: "UM PI signs the PAF/Conflict of Interest Statement" and "UM PI or Primary Research Administrator completes the Route for Approval activity".

eResearch **M** Proposal Management **test**

Sponsors Query Grant Finder All PAFs Site Administration

Root > All PAFs > Gain-Assisted Nanoscale Surface Plasmon Resonators

Current State

Main Contacts Change Tracking Activity History

Unit Review

Title: Gain-Assisted Nanoscale Surface Plasmon Resonators

PAF Summary

Display PAF Summary

PAF Worksheet

Edit PAF Worksheet

Manage Data

Change Primary Research Administrator

Finalize Proposal for DRDA

Manage

- If not finalized for DRDA Submission, once the proposal in Unit Review “Proposal Has Not Been Finalized” displays on PAF Workspace
- Can update with Manage Data – Finalize Proposal for DRDA

THIS PROPOSAL HAS NOT BEEN FINALIZED.

eResearch **M** Proposal Management **test** Edit PAF - 09-PAF00714

Hide/Show Errors | Print... | Jump To: Finalize Proposal for DRDA [OK] [Cancel] [Apply]

Gain-Assisted Nanoscale Surface Plasmon Resonators (09-PAF00714)

Indicate whether the final proposal documents are ready for submission and/or upload them here.

Please check here to 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 DRDA to submit.
(How do I know my Grants.gov forms are complete and valid?)

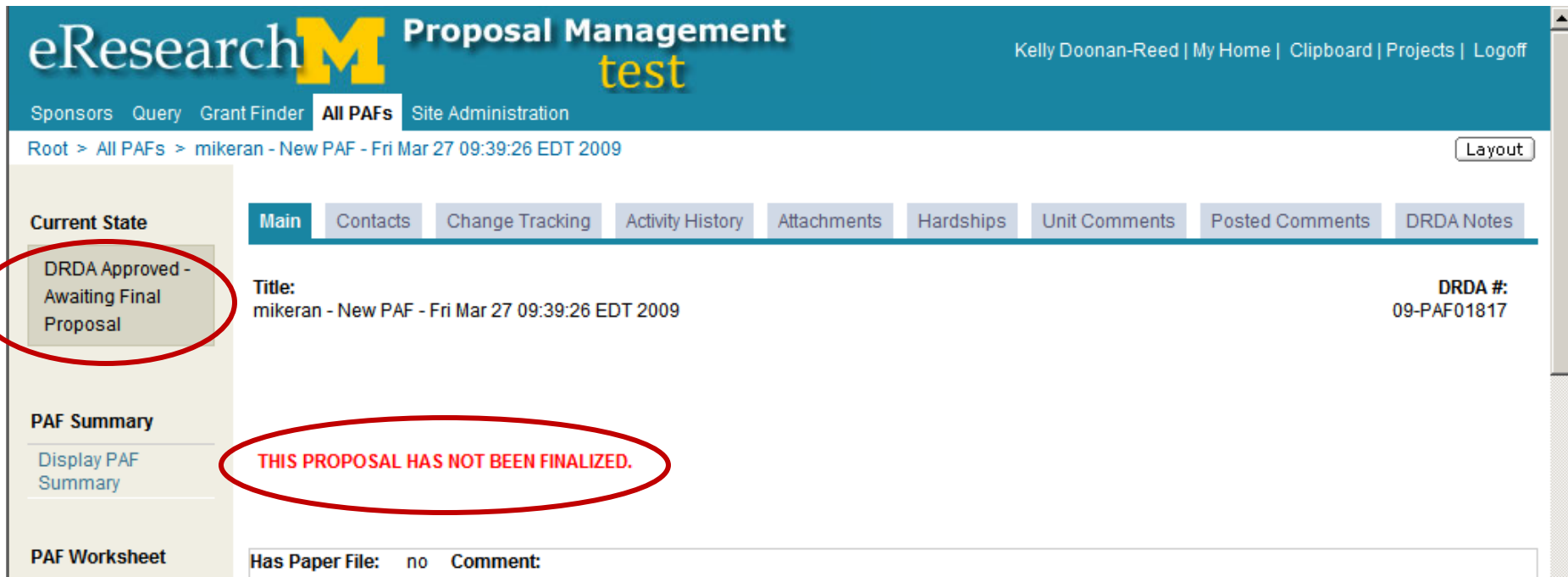
Check here to indicate that the Final Proposal has been uploaded to the sponsor's system.

HELP

Final Proposal:

File	Version	Browse	Title	Type	
		<input type="text"/> Browse...	<input type="text"/>	Proposal	Attach
Delete project summary PAF.doc	0.01	<input type="text"/> Browse...	Gain-Assisted,, Nanoscale	Proposal	Attach

- If not finalized for DRDA Submission, once the proposal has been approved by DRDA goes to new state “DRDA Approved – Awaiting Final Proposal”
- Email will be sent to the Primary Research Administrator & UM PI that the proposal needs to be finalized
- “This Proposal Has Not Been Finalized” still displays on PAF Workspace
- Can update with Manage Data – Finalize Proposal for DRDA



The screenshot displays the eResearch M Proposal Management test interface. The header includes the eResearch M logo, the text "Proposal Management test", and user information: "Kelly Doonan-Reed | My Home | Clipboard | Projects | Logoff". Navigation links include "Sponsors", "Query", "Grant Finder", "All PAFs", and "Site Administration". The breadcrumb trail is "Root > All PAFs > mikeran - New PAF - Fri Mar 27 09:39:26 EDT 2009". A "Layout" button is visible in the top right.

The main content area features a navigation bar with tabs: "Main", "Contacts", "Change Tracking", "Activity History", "Attachments", "Hardships", "Unit Comments", "Posted Comments", and "DRDA Notes".

The "Current State" section shows "DRDA Approved - Awaiting Final Proposal" circled in red. Below it, the "PAF Summary" section includes a link "Display PAF Summary" and a red warning message "THIS PROPOSAL HAS NOT BEEN FINALIZED." circled in red. The "PAF Worksheet" section shows "Has Paper File: no" and "Comment:".

Additional details include "Title: mikeran - New PAF - Fri Mar 27 09:39:26 EDT 2009" and "DRDA #: 09-PAF01817".

- The remaining slides group pilot issues reported & update on status & workarounds. The groupings are:
 - Proposal Preparation
 - Unit Review
 - Grants.gov
 - Reviewer
 - Emails from eRPM
 - Award Notifications

- Adding Appointments for Key Personnel
 - Issue: faculty appointments at School/College, not at Department level
 - Work-around Create a future appointment for department level
 - Learn more: http://www.umich.edu/~eresinfo/erpm/add_help/2_3.html

Edit PRPSL_Personnel

Appointment Details for Stephen Forrest in PAF

Title	Department ID	Department / Unit

Add Appointments from HR System

Title	Department ID	Department / Unit	Appointment Info	Job Code
VP RESEARCH	550000	Office of VP for Research		
PROFESSOR	216100	COE EECS - ECE Division		
Professor	184500	LSA Physics	Regular	UM PI Eligible
Professor	221800	Materials Science & Engin.	Without Salary - Regular	UM PI Eligible

Add Future Appointments

Title	Department ID	Department / Unit
<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Future Appointments

Title	Department ID	Department / Unit
<input type="text"/>	<input type="text"/>	<input type="text"/>

- Request to add documents on the Ineligible Job Code Comment page

2.3a Ineligible Job Code Comments*

First Name	Last Name	Title	Ineligible Job Comments *
[Redacted]	[Redacted]	ERP Business Analyst Inter	<input type="text"/>

- Fix – Will be addressed in a future release
- Work-around – Upload document on Internal Documents page

Internal Documents

Use this page to upload administrative shell and internal documents for review.

DRDA Administrative Shell includes: Sponsor form signature page, Budget, Budget Justification, Abstract or Draft of Proposal Text



[HELP](#)

6.2 Supporting Documents:

File	Version	Browse	Title	Type	
<input type="text"/>	<input type="text"/>	<input type="button" value="Browse..."/>	<input type="text"/>	Research Plan	<input type="button" value="Attach"/>

- 6.2 Internal Documents page, inconsistency using delete button.
 - Document was deleted using the delete button. Sometimes, when the user left the page and returned to the page the document was not deleted (still appeared on the page).
 - Fix – We were not able to recreate this issue. Please report if encountered in the future.

- Budget and Time Period – Validation Errors

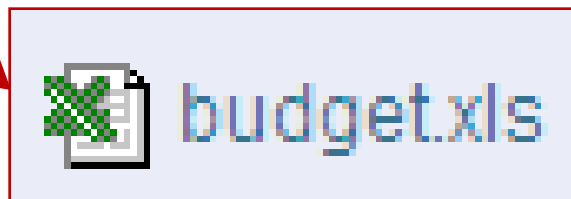
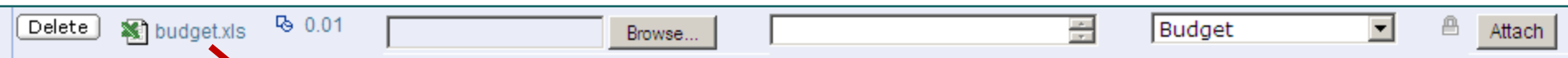
Proposed budget's total direct cost share for sponsor must be greater than 0 to route proposal for approval. Project received permission to submit this pre-proposal through the system, but the budget is \$0. Issue found with pre-proposal.

- Workaround – Enter \$1 to satisfy the requirement.

PROPOSED TOTAL PROJECT BUDGET

Start Date: *	<input type="text" value="1/30/2009"/>		
End Date: *	<input type="text" value="1/31/2009"/>		
Rate %: *	<input type="text" value="26"/>		
	UM Cost Sharing	Sponsor	Total
Direct Costs: *	\$0	<input type="text" value="\$1"/>	\$1
Indirect Costs: *	\$0	<input type="text" value="\$10,000"/>	\$10,000
TOTAL:	\$0	\$10,001	\$10,001

- Problem with Uploaded Documents
 - Uploaded documents did not have a file extension (e.g., budget) thus could not be opened or viewed by anyone else
 - Mac users make sure your uploaded document includes file extension (e.g., budget.xls)
 - Included this tip in training (Working with Documents) & online help.
http://www.umich.edu/~eresinfo/erpm/docs/PM_attach_documents_SS.pdf



- Space not found, e.g., clinical space
 - Added new option to address space not found
 - Lets people manually enter space & department

Select SPACE_Room

Building Name: Find

Room Number:

Department ID:

Enter a building name or room number, and then click Find.

Tips:

- Use % as a wildcard with a partial name (for example, %boyer%).
- To display all rooms, leave fields blank and click Find.

Select the room(s) to add and click OK

Space Not Found:

- 1. If you cannot find space, check here
- 2. Click Find in the top right corner
- 3. Select Space Not Found from the list that appears below
- 4. Click OK at the bottom of this window

OK Cancel

Space Not Found:

1. If you cannot find space, check here
2. Click Find in the top right corner
3. Select Space Not Found from the list that appears below
4. Click OK at the bottom of this window

- Unit Review
 - Fixed - Routing Sequence Issues
 - Fixed - Reviewers reviewing early (prior to its arrival in their Inbox) experienced problems with Making & Submitting Changes

- Fixed– Subproject/Grants Views Details or comments not displayed
 - Now when all detail visible when save line item

3.15 Subproject/Grant Details *

Anticipated Subproject/Grants for Total Project Period:


Dept ID:


	UM Cost Sharing	Sponsor	Total
Direct Costs: <input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Indirect Costs: <input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	0	0	0
Comments: <input type="text"/>			

555000 - Women in Science & Engineering

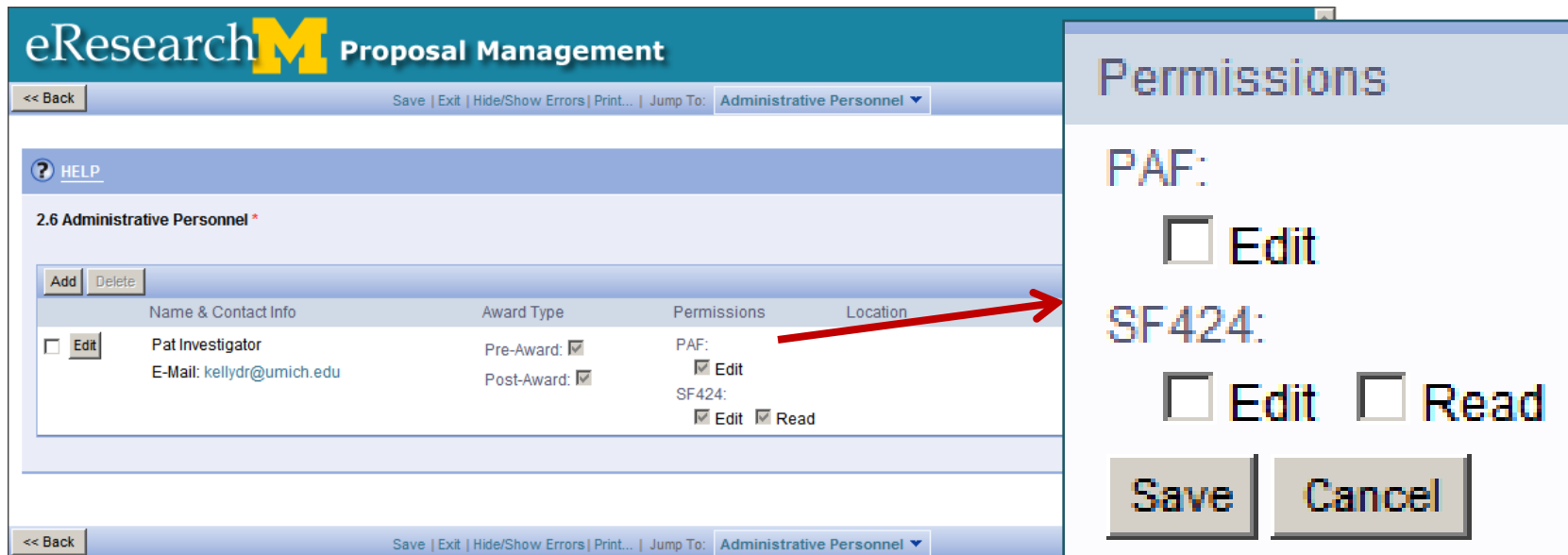
	UM Cost Sharing	Sponsor	Total
Direct Costs	\$100,000.00	\$50,000.00	\$150,000.00
Indirect Costs	\$1.00	\$1.00	\$2.00
Total	\$100,001.00	\$50,001.00	\$150,002.00
Comments			

Grand Total (all subprojects): **\$100,001** **\$50,001** **\$150,002**

- Read permission is required to view SF-424 Summary (either the print version or the PDF version after the PDF version is generated). Accessed from the PAF Workspace. (Addressed pilot issue)


SF-424 Summary
Display SF-424 Print Version
- Edit rights give access to edit the Grants.Gov Forms. You will see the link from the PAF Workspace. Edit rights should be assigned in conjunction with Read rights. Without Read, the person will not be able to view it in order to edit.


Grants.Gov Forms
Grants.gov for 09-PAF00323
- When a person does not have any Grants.gov rights, they will not see the Grants.gov links in the PAF Workspace.



The screenshot shows the eResearch Proposal Management interface. The main table lists administrative personnel with columns for Name & Contact Info, Award Type, Permissions, and Location. A red arrow points from the 'Permissions' column of the 'Pat Investigator' row to the 'Permissions' dialog box. The dialog box has a title 'Permissions' and contains two sections: 'PAF:' with an unchecked 'Edit' checkbox, and 'SF424:' with unchecked 'Edit' and 'Read' checkboxes. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

	Name & Contact Info	Award Type	Permissions	Location
<input type="checkbox"/> Edit	Pat Investigator E-Mail: kellydr@umich.edu	Pre-Award: <input checked="" type="checkbox"/> Post-Award: <input checked="" type="checkbox"/>	PAF: <input checked="" type="checkbox"/> Edit SF424: <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Read	

Permissions

PAF:

Edit

SF424:

Edit Read

Save Cancel

- Fixes – Expected this week. Tested preview copy of 1.5, working on implementing into production.
 - 7 new Grants.gov forms available
 - Grants.gov .pdf version did not display as expected (not interleaved properly)
 - Agency: Not Elsewhere Classified (see next page – report if found)
 - Sub-award imports
 - On SF424 workspace for sub-awards will have a link to download zip file. Will have 10 potentials forms to download for appointees.
 - Then will be able to upload/import this information for appointees. Can upload/import as many times as needed.
 - Key is to have appointees validate PDFs before they send to you. You will not be able to upload/import unless the PDF has been validated.

- If see this Grants.gov – Agency “Not Elsewhere Classified”
 - Report this immediately if this occurs.
 - Would appear on cover page
 - When generate PDF version no agency listed

The screenshot displays the 'SF 424 (R&R) APPLICATION FOR FEDERAL ASSISTANCE' form within the eResearch M Proposal Management system. The form is titled 'SF 424 (R&R) APPLICATION FOR FEDERAL ASSISTANCE' and includes various fields for applicant information, project details, and contact information. A red arrow points to the '9. NAME OF FEDERAL AGENCY' field, which contains the text 'Not Elsewhere Classified'. This text is highlighted in a green box. The form also includes fields for '10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER' and '11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT'. The system interface includes navigation buttons like '<< Back' and 'Continue >>' and a status bar at the bottom showing 'SF424 R&R Cover Page 1 (V1.1)'.

Check to see if your forms are available

- Required forms = Yes (form available)
- Optional forms = Yes (form available)
- Can use eRPM for system to system submission if all required forms are supported & all needed optional forms are supported.
- If no, to any required forms or needed optional forms, must submit using Adobe, will still need to complete PAF in eRPM for review & approval.

1.9

Add

n.

used for

FOA Information

Agency: National Institutes Of Health
 Opportunity Name:
 Opening Date: 8/3/2006
 Funding Opportunity ID: PAR-SS-R01
 CDFA Number:
 Yearly Direct Cost Limit:
 Max Years:
 Electronic Submission Allowed:
 Description:
 Link to Announcement: [Information URL](#)

Required Forms:

DisplayName	Supported
PHS 398 Checklist V1.1	yes
PHS 398 Cover Page Supplement V1.1	yes
PHS 398 Research Plan V1.1	yes
Research & Related Other Project Information V1.1	yes
Research & Related Project/Performance Site Locations V1.1	yes
SF424 (R&R) V1.1	yes
Research & Related Senior/Key Person Expanded V1.1	yes

Optional Forms:

DisplayName	Supported
PHS 398 Cover Letter File V1.1	yes
PHS 398 Modular Budget V1.1	yes
Research & Related Budget V1.1	yes
R&R Subaward Budget Attachment Form V1.2	yes

SF-424 Summary

[Display SF-424 Print Version](#)

Grants.Gov Forms

Grants.gov for 09-PAF00226

Manage Data

[Change Primary Research Administrator](#)

[Finalize Proposal for DRDA](#)

[Manage Administrative Personnel](#)

[Related Projects](#)

[Submission Instructions](#)

Activities

[Copy PAF Info to Grants-gov Forms](#)

[Suspend Approval](#)

[Post a Comment for the Entire Project](#)

[Clone PAF](#)

[Create New Hardship Request](#)

Hardships Associated with this PAF

Primary Research Administrator:

[Redacted]

Department/Unit Deadline:

Direct Sponsor:

ABC Corp

DRDA Project Representative:

Genevieve Espinosa

Routing and Approval Status:

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Project Representative	yes	1/12/2009	Approved
Signing Officer	yes	1/12/2009	Approved

Copy PAF Info to Grants.gov Forms

- PAF & grants.gov form set not automatically mapped. You need to actively copy information entered on PAF to grants.gov form set.
- Copies all PAF fields mapped to Grants.gov form set.

! Warning ! If you have entered information in these mapped fields, it will be copied over.

Fix: Added warning to the activity that lets you know that you will copy over information.

- Foreign location, required to include a zip code. Required to enter something or could not move on.
 - Problem with validation from agency. Contact the appropriate agency to report this issue.
- Zip code validation error
 - Zip code pulled from M-Pathways 12345-6789 (format)
 - Dash causes error when validate
 - Workaround remove dash
 - Being prioritized for a future release
- Indirect calculation doesn't round to the nearest whole dollar
 - Fix – Need an enhancement from our vendor.
 - Workaround – you can manually do this yourself.

- PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION (Pulled from R&R Key person) - Position/Title is pulled from “Primary Work Location” from M-Pathways Human Resources.
 - Work around - Change this on the RESEARCH & RELATED Senior/Key Person (with Expanded) Profile page.
- Areas affected by project and Congressional district on the face page are blank.
 - Not automatically filled in because different for Dearborn & Flint.

- Required documents/fields (marked with a **red asterisk ***)
 - Requiring certain docs are uploaded before moving on to the next page. Not always possible as fill out the application in stages/pieces. E.g., required to upload a project summary. At the PAF stage, it is often draft.
 - Fix - Not able to change this in the immediate future.
 - Workaround - Remember you can use the Jump To list to skip between pages.
 - **Tip:** If you have a partially completed page, use the Jump To move to the next section. It will save a partially completed page.
 - **Warning:** If you try to click save or continue on a partially completed page you receive a warning.

- Entering data multiple budget years
 - When entering budgets, names don't carry over from the Yr 1 budget sheet
 - Budget pages not prefilled after first one - it would be so nice if the text would prefill, not the numbers
 - Cognizant Federal Agency information only automatically entered in Yr 1. Had to enter it separately each year
 - Cannot be prefilled because when we create the SF424 we do not know how many budget periods.

- Addressed
 - Problems generating print version – now break up print jobs & compile before printing so that print versions do not time out
 - Made it faster to validate Grants.gov forms
- PDF version is a “Review” copy not “Preview” of what is submitted
 - Addressed that attachments were not interleaved properly, but remember...
 - Each agency assembles on their end. E.g., we try to approximate what you will see at NIH Commons, but go to Commons for a preview copy.
- Process Clarification - Copy PAF Info to Grants.gov Forms, Complete Grants.gov forms, validate, finalize for DRDA submission
 - See http://www.umich.edu/~eresinfo/erpm/docs/PM_GrantsGov.pdf

- Fixed - Once submitted to Grants.gov, the project status did not update as expected
- Fixed - Request for additional fields to be mapped from PAF to Grants.gov forms
- Fixed – Cover Page Supplement - Application Organization - Pulling address from PI & not DRDA Representatives.
- Fixed - Copy PAF information to Grants.gov forms Included a warning that information entered may be overwritten (strengthened training information)
- Fixed - Organization not prefilled (added Regents).
- Fixed - PR's phone and fax numbers
 - Problem with an extra Elaine Brock account, if encounter 111-222-3333 and 444-555-6666, Report. Working on identifying all PAFs where extra account used.

- Fixed - pulling key personnel on first budget page
 - Listed in the following order
 - PI
 - Sponsor PI
 - Participating Investigator with Effort
 - Note: Listed in alphabetical order by name within the categories above
- Fixed - F&A rate was pre-populated with 54.5%, now being pulled from the PAF

- Proposal budget dollars: Not formatted with comma's after every three digits. Really hard to read large numbers.
 - Fix – Being prioritized for a future release.
- PAF Summary Printing
 - Problem printing full PAF Summary when using Firefox 2.
 - Fix – Not able to reproduce.
 - Work around- Use Firefox 3 or another browser, e.g., Internet Explorer, Safari.
- Email groups not all functioning properly
 - Email notifications not being sent to all email groups.
 - Fixed – Corrected email group settings.

- Submission to Sponsor
 - PI/Project Team Submission to Sponsor
 - Fixed - Final Proposal uploaded in Project Team Log Submission to Sponsor activity did not display in set of Final documents
 - With new Finalize Proposal for DRDA Activity this has been addressed
 - Removed ability to upload final proposal with this activity
 - Final proposal uploaded in Manage Data - Finalize Proposal for DRDA – will appear in Final Documents

- Project Team Sends

- Post a Comment for the Entire Project

learn more:

http://www.umich.edu/~eresinfo/erpm/docs/PM_postcomment_SS.pdf

- Tip: When posting a comment, if you need an action taken, make sure you select an email recipient to notify the person you need something done.

- eRPM system generates/sends email notifications

- PAF email notifications

learn more:

<http://www.umich.edu/~eresinfo/erpm/docs/Email%20Notifications.pdf>

- PAN/PAC email notifications

learn more:

<http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>

- Recipients listed in recent activity or click on activity name

Recent Activity

See the *Activity History* tab for a list of all activities.

Activity	Author	Activity Date ▲
Comment Posted for the Entire Project		
Please sign PAF xyz		
Email Recipients: Ruma Banerjee Jason Weinberg		

- Click on Documents/ Tasks/ Notifications to view recipients

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes the eResearch logo, the text 'Proposal Management test_ProdFixes', and links for 'My Home', 'Clipboard', 'Projects', and 'Logoff'. Below the navigation bar, there are tabs for 'Query', 'Grant Finder', 'All PAFs', and 'Site Administration'. The main content area displays 'Activity Details (Award Information Released)' for a specific activity. The activity details include: Author (redacted), Activity Date (1/21/2009 4:13 PM EST), For Person (redacted), Created Date (1/21/2009 4:13 PM), and Logged For (PAF): Annual Membership Fee for NSF - Engineering Research Center (ERC) for Reconfigurable Machining Systems. Below the activity details, there are three tabs: 'Activity Form', 'Property Changes', and 'Documents / Tasks / Notifications'. The 'Documents / Tasks / Notifications' tab is selected and highlighted with a red box. Under this tab, there are sections for 'Documents:', 'Project Task Assignments:', and 'E-mail Notifications:'. The 'E-mail Notifications:' section shows a table with a header 'Name' and a row for 'Project Award Notice'. The recipients listed are: Elizabeth Wagner (CoE Research) email: elwa@umich.edu, Linda Forsyth (CoE Resource Planning & Mgmt) email: lforsyth@umich.edu, Marjorie Lesser (Mechanical Engineering) email: lesser@umich.edu, Merlis Nolan (Mechanical Engineering) email: mnolan@umich.edu, and Yoram Koren (Mechanical Engineering) email: ykoren@umich.edu. This list of recipients is also highlighted with a red box.

eResearch **M** Proposal Management
test_ProdFixes

Query Grant Finder All PAFs Site Administration

Root > All PAFs > Annual Membership Fee for NSF - Engineering Research Center (ERC) for Reconfigurable Machining Systems > Award Information Released details

Activity Details (Award Information Released)

Author:	[Redacted]	Activity Date:	1/21/2009 4:13 PM EST
For Person:	[Redacted]	Created Date:	1/21/2009 4:13 PM
Logged For (PAF):	Annual Membership Fee for NSF - Engineering Research Center (ERC) for Reconfigurable Machining Systems		

Activity Form Property Changes **Documents / Tasks / Notifications**

Documents:

Project Task Assignments:

Name	Priority	User	Activity	Due Date
------	----------	------	----------	----------

E-mail Notifications:

Name	Recipients
Project Award Notice	Elizabeth Wagner (CoE Research) email: elwa@umich.edu Linda Forsyth (CoE Resource Planning & Mgmt) email: lforsyth@umich.edu Marjorie Lesser (Mechanical Engineering) email: lesser@umich.edu Merlis Nolan (Mechanical Engineering) email: mnolan@umich.edu Yoram Koren (Mechanical Engineering) email: ykoren@umich.edu

- Reports of not being able to access links from Groupwise users
 - E.g., PAN/PAC award documents, direct link to PAF Workspace
 - Issue: Many email systems by default view only Plain Text messages
 - Workaround: Turn on ability to view html messages
- **WARNING!** Messages Forwarded in text email systems
 - Links break due to Plain Text system set-up
 - E.g., if you forward “PAF Ready for Review” email to your Reviewer that Can Sign, link is broken
 - Cannot click it or copy & paste into a browser
 - Workaround: Navigate to PAF/Project using Home Workspace

- PAN/PAC sent to:
 - UM Principal Investigator
 - Sponsor Principal Investigator
 - Participating Investigators with Specified Effort
 - Administrative Contacts
 - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.

From: eresearch@umich.edu
Sent: Wednesday, December 17, 2008 2:11 PM
To: investigator_pat@umich.edu
Subject: Project Award Notice

**The University Of Michigan
Division of Research Development and Administration
1056 Wolverine Tower
fax (734) 763-4053
Project Award Notice**

DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED

An award has been received and processed for the proposal identified below. A Project Award Notice (PAN) has been prepared and approved by DRDA. Both the PAN and the award are available from the eResearch project site. The project/grant and shortcode WILL NOT yet be active in the Financial and HRMS systems when you receive this message. You will receive a separate notice from Financial Operations when the numbers are activated.

Listed below are a number of things the Project Team can do before the
Project/grant and shortcode are active


- Improvements made
 - Subject line improved
 - PAN text moved to improve printability
 - PAN/PAC numbering improvements
 - PAN/PAC email recipients listed in message
- Learn more about PAN/PAC notifications from eRPM:
 - <http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>


- Department hierarchy visually organized

Manage Unit

LSA UG: Environment (173300)

Dean Approval **IS** required.

routes to...  College of Lit, Science & Arts (174200)

routes to...  LSA Dean: Undergrad. Education (171300)

Approval hierarchy: LSA UG: Environment (173300)

If this unit is listed as the Administrative Home for any proposal, it should be the last to approve before the Dean's Office during routing and approval: no

Unit Liaison	Department	Is Backup Unit Liaison
Steven Beach	LSA Dean: Dean's Office	yes

Unit Liaison(s):

- Can clone/copy PAFs/Projects/Proposals from any state.
- Use to make templates.
- Learn more:
http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_Clone_PAF_SS.pdf

- We want to thank all of our pilot volunteers.
- Please let us know if you we missed anyone.
- Please send any updates to kellydr@umich.edu.