

**Topic 1: PI & Project Team Course Topics and Materials**

Course Description:

This instructor led training course combines the courses on proposal preparation and unit review, and will prepare project team members and individuals who create & review (or facilitate the review) of proposals in the eResearch Proposal Management (eRPM) system by:

- Facilitating the process to work with Proposal Approval Forms (PAFs) in eRPM
- Providing skills and knowledge to articulate eRPM workflow, create and manage PAFs/proposals, review and approve proposals (or show others how to do this), use system functionality to communicate with others, and view past transactions
- Promoting electronic management of proposals from proposal preparation through submission to sponsor.

This course is broken into two sections:

- PI & Project Team (yellow pages)
- Reviewer (blue pages)

PI & Project Team Section Objectives:

By the end of this course, you will be able to:

- Create and manage proposals and projects using the eRPM system.
- Complete the processes and activities needed to get your proposal submitted to the sponsor.

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**Topic 2: Getting Started with Proposal Management**

Goal/outcome:

Gain an understanding of Proposal Management, how eResearch supports the process, how to login to eResearch, and resources to get started.

Objectives:

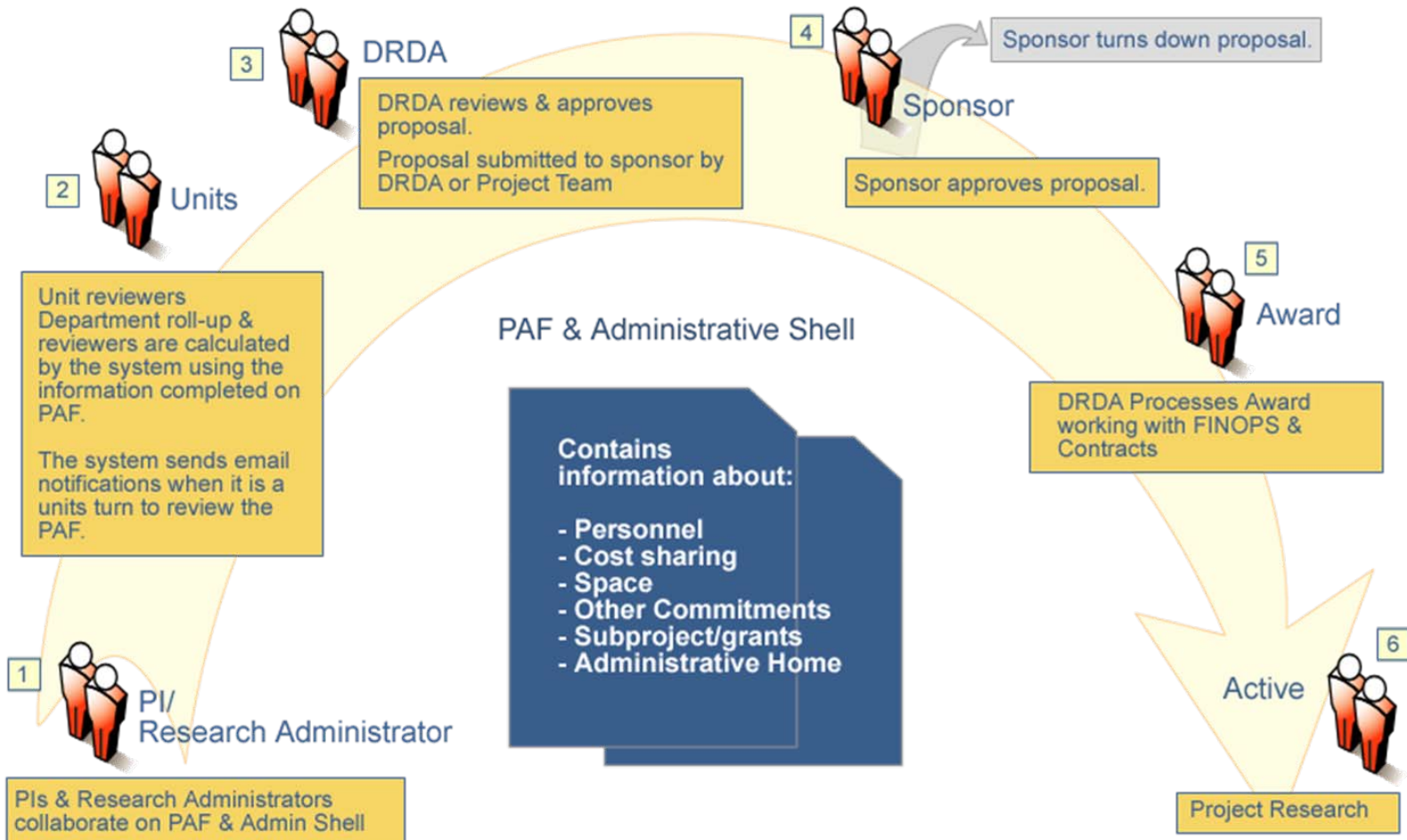
After completing this module, you will be able to:

- Recognize the roles of people and groups in managing proposals and projects.
- Recognize how eResearch electronically supports the existing proposal management workflow.
- Login to eResearch.

<b>Materials</b>	<b>Page</b>
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# eResearch **M** eRPM Workflow

eRPM system workflow starts at proposal creation and continues through active project.

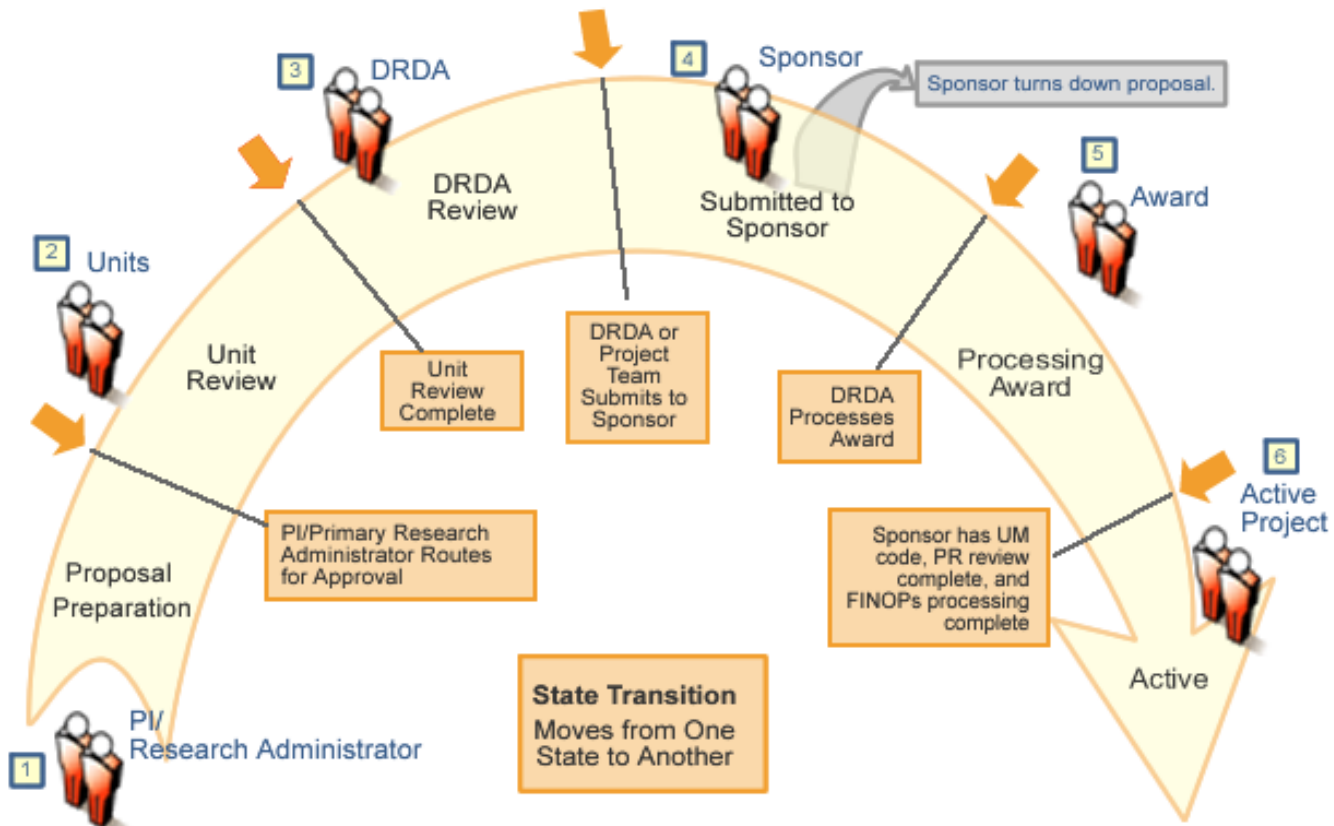




# eResearchM Proposal Management - State Transitions

## High-Level Proposal States & State Transitions

*Excludes Proposal Changes*



## Login to eResearch Proposal Management

eResearch Proposal Management (eRPM) is a new Web-based system to accommodate the electronic routing, approval, and submission of funding proposals to external sponsors, including Grants.gov.

eResearch is accessed at <http://eresearch.umich.edu/>.

### Important Information

- If you need a uniqlname and a UMich Kerberos password, go to: <http://www.itd.umich.edu/help/faq/uniqlnames/>
- For optimal viewing of eResearch, the recommended screen resolution is 1024 x 768 or higher.
- eResearch can be viewed using web browser. For a full list of supported browsers and system requirements, go to: [http://www.mais.umich.edu/systeminfo/browser\\_os.html](http://www.mais.umich.edu/systeminfo/browser_os.html)

### Tips

- Turn off pop-up blockers so that you can view all elements of eResearch properly. You must be able to view pop-ups to use eResearch.
- To properly receive email messages sent from eRPM, you must be able to view html emails. If you have a plain text e-mail system (e.g., Groupwise), turn on the ability to View HTML messages.

### eResearch Home Page



1. Go to <http://eresearch.umich.edu/>.
2. Click **Login** under Proposal Management.

UM Authentication Required Page

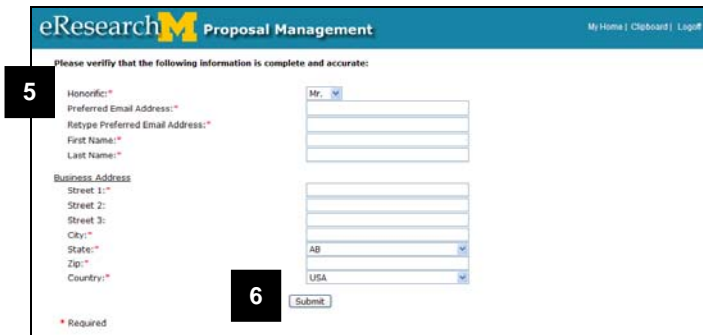


3. Enter your **Login ID** (username or Friend ID) and your **Password**.

Notes:

- An Mtoken is not required to use eResearch.
  - If you are a non-UM user, refer to the *Obtaining a Friends Account Step-By-Step Procedure* for more information.
4. Click **Login**.

Verify Information



5. The first time you login to eResearch you will be prompted to verify your contact information.

Enter your contact information, filling in all fields marked with a red asterisk (\*).

Your address is populated from your office address from the M-Pathways Human Resources system.

Note: To change your work address:

Complete the Address/Personal Data Form (30005) and return it to the Human Resource Records Office and they will update the address in the hr address data base.

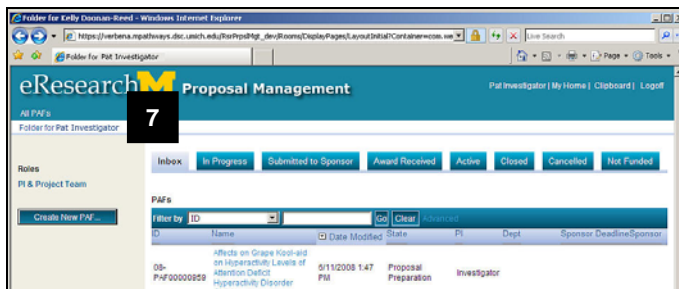
<http://www.hr.umich.edu/hrris/forms/pdfs/Addr-PersData2.pdf>

You can only have one address in eResearch.

Your address will be maintained automatically for you. The eResearch system has a nightly feed from the M-Pathways system to update addresses.

6. Click **Submit**.

eResearch Home Workspace



7. eResearch Proposal Management opens and displays your **Home Workspace**.

### Topic 3: Workspaces

We will introduce the PI & Project Team **Home Workspace** in the morning, use the **PAF/Project Workspace** as we create the PAF, and lastly later today work with **Grants.gov Workspace** in eRPM.

Goal/outcome:

- To know how to use the Home Workspace to find information.
- To know how to use the PAF (Project) Workspace to find information and perform activities.
- Understand how the PAF Workspace relates to the Home Workspace.
- Understand how the Grants.gov Workspace relates to the PAF Workspace & Home Workspace.

Objectives:

After initially completing this module, you will be able to:

- Use your PI Project Team Home Workspace tabs to track PAFs/proposals/projects

By the end of the class you will be able to:

- Know how to use the PAF/Project Workspace to find information and perform activities.
- Locate & use your Grants.gov Workspace.
- Find PAFs/proposals/projects by using All PAFs and the filter by method.

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PAF/Project Workspace (field description)	13
Reviewer Home Workspace (step by step procedure)	20
Find Proposals and Projects (step by step procedure)	22



## **PI & Project Team Home Workspace - Description**

Your Home Workspace is your launch pad for eResearch Proposal Management. It allows you to:

- View information about your Proposal Approval Forms (PAFs)/proposals/projects, track where a proposal/project is in the process, and see items that need action in your Inbox.
- Access projects in order to view documents related to a project. The system not only accomplishes the routing and approval tasks, it also provides document storage and access for those project team members and unit administrators who have some relationship to the project.

eResearch Home Workspace

<b>A</b>	Announcements are posted on the workspace to alert you of recent news, functionality changes, and other general information.
<b>B</b>	Your available roles appear. <ul style="list-style-type: none"> <li>• If you have multiple roles (e.g., PI &amp; Project Team and Reviewer), click the role name to switch between roles. Your active role appears in bold.</li> <li>• The role selected determines what is displayed in your Home Workspace. E.g., in the screen shot above PI &amp; Project Team is bold and this is the role used to create PAFs.</li> </ul>
<b>C</b>	Tabs organize your Home Workspace into the following sections: <ul style="list-style-type: none"> <li>• <b>Inbox</b> – Displays PAFs/proposals that require action by you or your unit.</li> <li>• <b>In Progress</b> – Displays all of your PAFs/proposals that are currently in progress. These could be PAFs that are still being completed, PAFs routed for unit review, or PAFs being reviewed by DRDA.</li> <li>• <b>Finalized Proposals</b> – Displays all PAFs with finalized proposals.</li> <li>• <b>Submitted to Sponsor</b> – Displays all proposals submitted to a sponsor.</li> <li>• <b>Award Received</b> – Displays all proposals that have received an award from a sponsor, but have not been fully processed by DRDA and Financial Operations.</li> <li>• <b>Active</b> – Displays all projects that have had their award processed and are active in the general ledger.</li> <li>• <b>Closed</b> – Displays projects that have concluded and have been closed.</li> <li>• <b>Cancelled</b> – Displays PAFs/proposals that have been cancelled prior to submission to sponsor.</li> <li>• <b>Not Funded</b> – Displays submitted proposals that were not funded by the sponsor or withdrawn by the PI.</li> </ul>



eResearch Home Workspace

The screenshot shows the eResearch Proposal Management Sandbox interface. On the left is a sidebar with an announcement, roles (PI & Project Team, Reviewer), and support links. The main area has tabs for 'Inbox', 'In Progress', 'Finalized Proposals', 'Submitted to Sponsor', 'Award Received', 'Active', 'Closed', 'Cancelled', and 'Not For'. Below these are sections for 'PAFs with Required Action' (containing a table of proposals), 'Hardships with Required Action', 'PAFs Not Yet Signed by PI', and 'PAFs Assigned to You for Ad Hoc Review'. A legend at the bottom explains the letter-coded callouts (D-K) used in the screenshot.

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline
09-PAF01753	Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2	4/29/2009 11:19 AM	Proposal Preparation	Primary Investigator	Mechanical Engineering	DARPA	
09-PAF00809	New horizons in nanospheres-revised title	2/13/2009 2:17 PM	Unit Review - Project Team Making Changes	Primary Investigator	Mechanical Engineering	National Science Foundation	6/1/2009

<b>D</b>	<b>Create New PAF</b> – Activity used to create a new PAF.
<b>E</b>	<b>Create New User</b> – Use to create eResearch Proposal Management account in order to add person to a PAF (e.g., need to add account for PI or Research Administrator).
<b>F</b>	<b>Projects/PAFs/Proposals</b> are listed in your Home Workspace. You can click on the link to access its Project Workspace. You can sort your list by various headers.
<b>G</b>	<b>State</b> – Location where the proposal is in the process, e.g., Proposal Preparation, Unit Review, DRDA Review.
<b>H</b>	<b>PAFs with Required Action</b> – Displays all PAFs that you still need to do something with (e.g., completing PAF, make changes & submit changes, route for approval, etc.)
<b>I</b>	<b>Hardships with Required Action</b> – Displays all proposals with hardship request that require action.
<b>J</b>	<b>PAFs Not Yet Signed by PI</b> – Displays all PAFs that have not yet been signed by UM Principal Investigator. PAF Can appear in both PAFs with Required Action & PAFs Not Yet Signed by PI. Use this to quickly find a list of PAFs where UM PI still needs to sign Conflict of Interest Statement/PAF.
<b>K</b>	<b>PAFs Assigned to You for Ad Hoc Review</b> – Displays all proposals that you have been assigned to as an Ad Hoc reviewer. You do not have authority to sign/approve proposal, but can enter comments. Only Reviewers can assign Ad Hoc review rights to a proposal.
<b>L</b>	<b>Filter by</b> – Allows you to search for proposals by ID (DRDA Number), name, state, UM Principal Investigator or department. You select a <b>Filter by</b> criteria, enter a keyword in the field, and click <b>Go</b> . <b>Tips:</b> <ul style="list-style-type: none"> <li>Use a percent sign as a wildcard (%). E.g., %Review will return all PAFs that are in the states of Unit Review and DRDA Review</li> <li>Clicking <b>Advanced</b> allows 2 more filter by criteria.</li> </ul>





eResearch Home Workspace

<b>M</b>	<b>Support Links</b> – Provides links to support resources and materials.
<b>N</b>	<b>All PAFs</b> – Displays all of your PAFs/proposals in any state.
<b>O</b>	<b>My Home</b> – Allows you to return to the first page of your Home Workspace from any page in the system.
<b>P</b>	<b>Logoff</b> – Allows you to exit eResearch.

## PAF/Project Workspace - Description

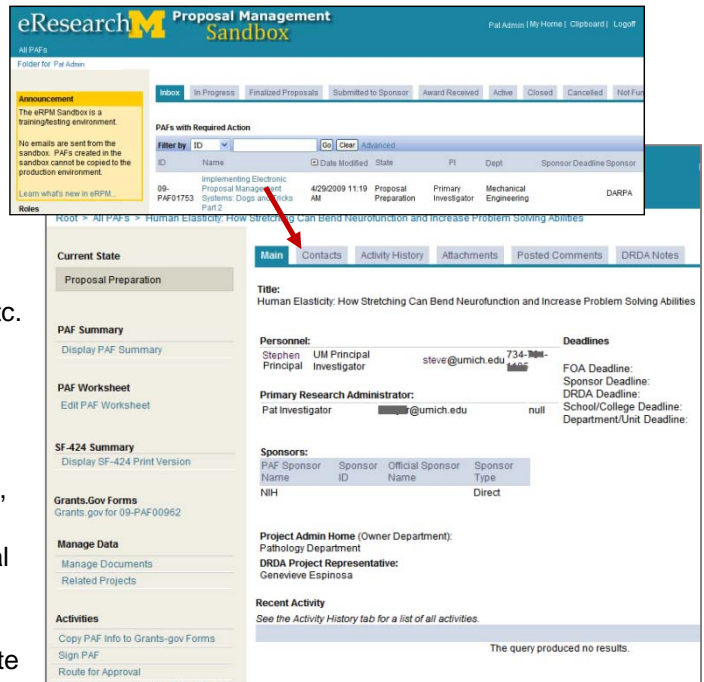
### How Do I Get to the PAF/Project Workspace?

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 eResearchM 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 several sections:

- Current State:** A dropdown menu is set to 'Proposal Preparation'.
- PAF Summary:** A link to 'Display PAF Summary'.
- PAF Worksheet:** A link to 'Edit PAF Worksheet'.
- SF-424 Summary:** A link to 'Display SF-424 Print Version'.
- Grants.Gov Forms:** A link to 'Grants.gov for 09-PAF00962'.
- Manage Data:** A link to manage the data.

The main content area displays the following information:

- Title:** Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities
- DRDA #:** 09-PAF00962
- Personnel:** Stephen UM Principal Investigator (steve@umich.edu, 734-764-1415)
- Primary Research Administrator:** Pat Investigator (@umich.edu, null)
- Sponsors:** NIH (Sponsor ID, Official Sponsor Name, Sponsor Type: Direct)
- Deadlines:** FOA Deadline, Sponsor Deadline (6/1/2009), DRDA Deadline, School/College Deadline, Department/Unit Deadline.
- Project Admin Home (Owner Department):** Pathology Department

A	<p><b>Current State</b> – 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"> <li>• <b>Proposal Preparation:</b> PAF/proposal is in this state when being completed by PI &amp; Project team.</li> <li>• <b>Unit Review:</b> Proposal has been routed to units for review.</li> <li>• <b>DRDA Review:</b> Proposal being reviewed by DRDA.</li> <li>• <b>DRDA Approved: Awaiting Final Proposal:</b> 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.</li> <li>• <b>Submitted to Sponsor:</b> Proposal submitted to sponsor by PI/Project Team or DRDA.</li> <li>• <b>Active:</b> Project active and you can view award information.</li> </ul>
B	<p><b>Display PAF Summary</b> – Displays all information entered on individual pages of PAF Worksheet in a printer friendly version.</p>
C	<p><b>Edit PAF Worksheet</b> – Allows you to make changes to the PAF.</p>

PAF Workspace – Proposal Preparation State

The screenshot displays the 'eResearchM Proposal Management' interface. At the top, it shows the user 'Pat Investigator' and navigation links for 'My Home' and 'Logout'. The breadcrumb trail indicates the current location: 'Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. The main content area is divided into several sections: 'Current State' (Proposal Preparation), 'PAF Summary' (Display PAF Summary), 'PAF Worksheet' (Edit PAF Worksheet), 'SF-424 Summary' (Display SF-424 Print Version), 'Grants.Gov Forms' (Grants.gov for 09-PAF00962), 'Manage Data' (Manage Documents, Related Projects), and 'Activities' (Copy PAF Info to Grants-gov Forms, Sign PAF, Route for Approval, Post a Comment for the Entire Project). The 'Main' tab is active, showing details for the PAF: Title: Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities; DRDA #: 09-PAF00962; Personnel: Stephen UM Principal Investigator (steve@umich.edu); Primary Research Administrator: Pat Investigator (@umich.edu); Sponsors: NIH (Direct); Deadlines: FOA Deadline, Sponsor Deadline (6/1/2009), DRDA Deadline, School/College Deadline, Department/Unit Deadline; Project Admin Home: Pathology Department; DRDA Project Representative: Genevieve Espinosa; Recent Activity: See the Activity History tab for a list of all activities. A message at the bottom states 'The query produced no results.'

D	<p><b>SF-424 Summary</b> – 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. Treat this as a review copy. It is not a preview of what will be submitted. The actual data &amp; attachments are submitted.</p>
E	<p><b>Grants.Gov Forms</b> – 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) &amp; Edit the Grants.gov forms.</p>
F	<p><b>Activities</b> – Displays activities that can be completed. Activities available are based on:</p> <ul style="list-style-type: none"> <li>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)</li> <li>Your role (E.g., only the UM Principal Investigator has the option to the Sign the PAF.)</li> </ul>
G	<p>Tabs organize the PAF Workspace into the following sections:</p> <ul style="list-style-type: none"> <li><b>Main</b> – 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.</li> <li><b>Contacts</b> – Displays contact information for Project Personnel, DRDA Project Representative and Administrative Staff.</li> <li><b>Activity History</b> – Displays a complete list of the Activities executed on the PAF once the PAF has been routed for approval.</li> <li><b>Attachments</b> – Displays the documents that are attached to the PAF/proposal/project.</li> <li><b>Posted Comments</b> – 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.</li> </ul>

PAF Workspace – Proposal Preparation State

<b>H</b>	<b>Title</b> – Displays the project title as entered on the first page of the PAF.
<b>I</b>	<b>PAF ID (DRDA Number)</b> – 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).
<b>J</b>	<b>Personnel</b> - Displays the contact information for all UM and Sponsor PIs.
<b>K</b>	<b>Deadlines</b> – Displays the deadlines that were entered on the PAF.
<b>L</b>	<b>Sponsors</b> – Displays the direct & prime sponsor information.
<b>M</b>	<b>Project Administrative Home</b> – Displays the Department that is the Project Administrative Home. Clicking on the department name displays contact information.
<b>N</b>	<b>DRDA Project Representative</b> – Displays the Project Representative.
<b>O</b>	<b>Recent Activity</b> – 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.
<b>P</b>	<b>My Home</b> – Allows you to return to your Home Workspace.
<b>Q</b>	<b>Logoff</b> – 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**

<b>R</b>	<b>View PAF Worksheet</b> – the PAF is in a non-editable state (e.g., Unit Review) & worksheet is read-only.
<b>S</b>	<b>Manage Data</b> – 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.
<b>T</b>	Additional tabs: <b>Change Tracking</b> – Displays a log of all change activities, the name of the person who made the change, and date of the change activity. <b>Unit Comments</b> – Place for Unit Reviewers to list comments. Only Reviewers from the same unit can view these comments.
<b>U</b>	<b>Routing and Approval Status</b> - 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.
<b>V</b>	<b>DRDA Approval Status</b> - 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**

<b>A</b>	<b>Title</b> – Displays the project title as entered on the first page of the PAF.
<b>B</b>	<b>PAF ID (DRDA Number)</b> <b>Note:</b> 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
<b>C</b>	<b>UM Principal Investigator</b> - Who received the award and date when processed.
<b>D</b>	<b>Administrative Home</b> - for the project.
<b>E</b>	<b>Post Award</b> - Contact for the award.
<b>F</b>	<b>DRDA Project Representative</b> - Contact for the award.



**Project Workspace – Active State (Continued)**

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

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

**Proposal Management Reviewer Home Workspace**

Your Home Workspace is your launch pad for eResearch Proposal Management. It allows you to:

- View information about your Proposal Approval Forms (PAFs), track where a PAF/proposal/project is in the process, and see items that need action in your Inbox.
- Access projects in order to view documents related to a project.
  - The system not only accomplishes the routing and approval tasks, it also provides document storage and access for those project team members and unit administrators who have some relationship to the project.

**Who Can See the Reviewer Home Workspace:** People with **Reviewer** or **Reviewer Who Can Sign** access (contact your Research Unit Liaison if you need access).

**Proposal Management Reviewer Home Workspace**

The screenshot shows the eResearch Proposal Management interface. On the left, a sidebar labeled 'My Roles' contains 'PI & Project Team', 'Reviewer', and 'Unit Liaison'. The 'Reviewer' role is selected and highlighted in bold. The main content area has a top navigation bar with tabs: 'Inbox', 'Pending', 'Approved', 'Submitted to Sponsor', 'Active/Closed/Turned Down/Withdrawn', and 'Manage Departments'. The 'Inbox' tab is active. Below the tabs, there are three sections:

- PAFs with Changes Returned:** A table with columns: ID, Name, Date Modified, State, PI, Dept, Sponsor Deadline, Sponsor, Receipt Date. One entry is visible: ID 09-PAF00047, Name Grape Koolaid Too, Date Modified 10/22/2008 12:02 PM, State Unit Review, PI House, Dept SRC-Seh-House, Sponsor Deadline 7/1/2010, Sponsor SecurityCorp.
- PAFs Ready for Review and Approval:** A table with the same columns. One entry is visible: ID 09-PAF00390, Name Elastic Bands Stretching Minds, Date Modified 2/23/2009 3:28 PM, State Unit Review, PI Samia, Dept Pop Studies-Research, Sponsor Deadline 3/11/2009, Sponsor National Rubber Foundation, Receipt Date 2/23/2009.
- Hardships Ready for Review and Approval:** A table with columns: ID, Name, Date Modified, State, PI, Dept, PR. It shows 'There are no items to display'.
- PAFs with Changes Requested:** A table with the same columns. One entry is visible: ID 09-PAF00058, Name Affects on Grape Kool-aid on..., Date Modified 3/11/2009 3:25 PM, State Unit Review - Project Team, PI House, Dept SRC-Seh-...

- A** Your available roles appear. If you have multiple roles (e.g., PI & Project Team and Reviewer), click the role name to switch between roles. Your active roles appear in bold. The role selected determines what is displayed in your Home Workspace.
- B** Tabs organize your Home Workspace into the following sections:
  - Inbox** – Displays PAFs/proposals that require action by you or your unit. The PAFs that appear are divided into the following categories:
    - PAFs with Changes Returned
    - PAFs Ready for Review and Approval
    - PAFs with Changes Requested

Proposal Management Reviewer Home Workspace

**G** **H**

<b>B</b>	<p><b>Upcoming</b> – Displays all of your PAFs/proposals that are currently in progress. These could be PAFs that are still being completed, PAFs routed for unit review, or PAFs being reviewed by DRDA.</p> <p><b>Approved</b> – Displays all proposals that you have approved and those that have had changes made by them. The PAFs that appear are divided into the following categories:</p> <ul style="list-style-type: none"> <li>• PAFs with Changes Since Approval</li> <li>• Approved PAFs</li> </ul> <p><b>Submitted</b> – Displays all PAFs/proposals submitted to a sponsor.</p> <p><b>Active/Closed/Turned Down/Withdrawn</b> – Displays all projects that are active, closed, have been turned down or withdrawn. The PAFs that appear are divided into the following categories:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Award Received</li> <li>• Closed</li> <li>• Cancelled</li> <li>• Not Funded</li> </ul> <p><b>Manage Departments</b> – Lists all departments assigned to you as a Reviewer. Click on the <b>Manage Department</b> to display Reviewers, Reviewers Who can Sign, PAF Email Recipients, and PAN/PAC email recipients for the department.</p>
<b>C</b>	<p><b>Projects/PAFs/Proposals</b> are listed in your Home Workspace. You can click on the Name to access its Project Workspace. You can sort your list by various headers.</p>
<b>D</b>	<p><b>State</b> – Location where the proposal is in the process, e.g., Unit Review, DRDA Review.</p>
<b>E</b>	<p><b>Filter by</b> – Allows you to search for proposals by ID (number), name, state, PI, or department. You select a <b>Filter by</b> criteria, enter a keyword in the field, and click <b>Go</b>.</p>
<b>F</b>	<p><b>All PAFs</b> – Displays all of your PAFs/proposals in any state.</p>
<b>G</b>	<p><b>My Home</b> – Allows you to return to the first page of your Home Workspace from any page in the system.</p>
<b>H</b>	<p><b>Logoff</b> – Allows you to exit eResearch.</p>
<b>I</b>	<p><b>Support Links</b> – Provides links to support resources and materials</p>

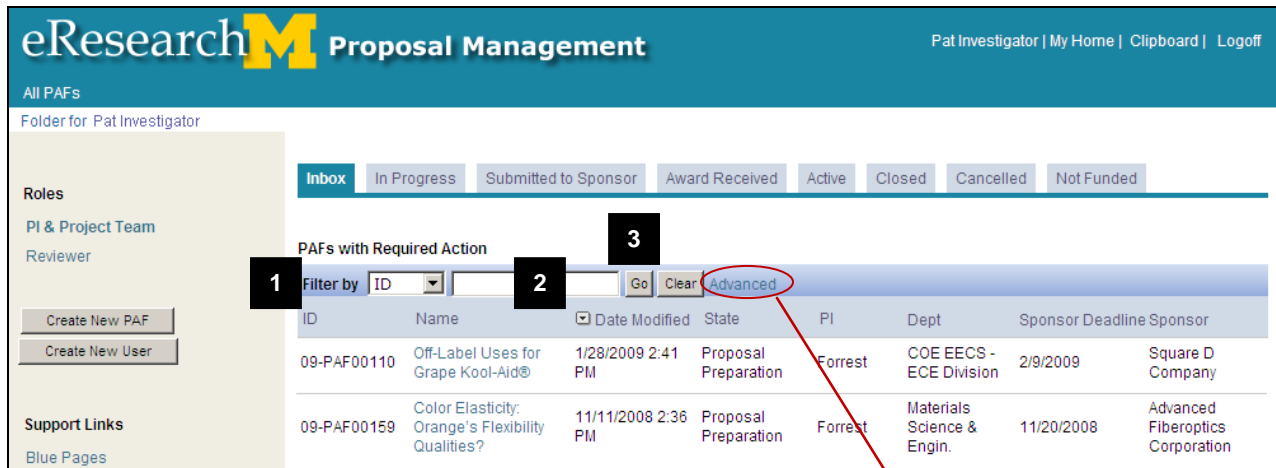
## Find PAFs/Proposals/Projects

You can find Proposal Approval Forms (PAFs)/proposals/projects using either:

- **Filter By:** Search for PAFs in your Workspace tabs using Filter By.
  - The Filter by function is used to narrow a list of PAFs/proposals/projects that share specified criteria such as State or Principal Investigator (PI). You will find this function in your Home Workspace wherever there are PAFs/proposals/projects listed.
- **All PAFs:** Displays a list of all PAFs/proposals/projects that you have permission to view and/or edit. You have permission to view and/or edit based on whether you are:
  - Listed as Key Personnel
  - Listed as Administrative Personnel
  - A Reviewer for a department listed on PAF

### Filter By

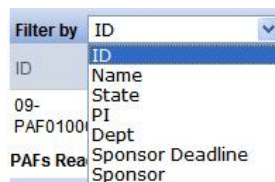
#### eResearch Home Workspace



1. Select **Filter by** criteria.

**Notes:**

- ID is the DRDA number
- Name is the title
- PI is the UM Principal Investigator

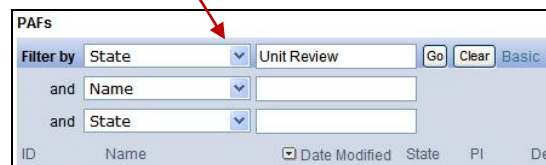


2. Enter keyword.

**Tip:** Use a percent sign as a wildcard (%) to specify parts of word. For example, %Review will return all PAFs that are in the states of Unit Review and DRDA Review.

3. Click **Go**.

**Tip:**



Click **Advanced** for 2 more filter by criteria.

**Note:** the Filter by function is also available in any role Home Workspace, under any tab as long as at least one PAF/proposal/project is listed.

All PAFS

eResearch Home Workspace

1

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline	Sponsor
09-PAF00110	Off-Label Uses for Grape Kool-Aid®	1/28/2009 2:41 PM	Proposal Preparation	Forrest	COE EECS - ECE Division	2/9/2009		Square D Company
09-PAF00159	Color Elasticity: Orange's Flexibility Qualities?	11/11/2008 2:36 PM	Proposal Preparation	Forrest	Materials Science & Engin.	11/20/2008		Advanced Fiberoptics Corporation

1. Click **All PAFs** from your Home Workspace.

eResearch All PAFs

2

ID	Name	State	Last State Change	PI	Dept	Sponsor	Deadline	Sponsor	PR
09-PAF00110	Affects on Grape Kool-aid on Hyperactivity Levels of Attention Deficit Hyperactivity Disorder	Unit Review	9/4/2008 9:18 PM	Forrest	COE EECS - ECE Division	11/19/2008		Sponsor 1	Maxwell
09-PAF00323	Off-Label Uses for Grape Kool-Aid®	Proposal Preparation	11/2/2008 2:07 PM	Forrest	COE EECS - ECE Division	2/9/2009		Square D Company	Maxwell
09-PAF00158	Color Elasticity: Fuschia's Flexibility Qualities?	DRDA Signing Officer Review	11/25/2008 4:14 PM	Forrest	Materials Science & Engin.	11/20/2008		38th DAC (Design Automation Conference)	Zdeba
09-PAF00305	Grape Kool-Aid Too	Unit Review	1/14/2009 2:20 PM	Forrest	COE EECS - ECE Division	2/9/2009		Square D Company	Maxwell
09-PAF00159	Color Elasticity: Orange's Flexibility Qualities?	Proposal Preparation	11/6/2008 4:19 PM	Forrest	Materials Science & Engin.	11/20/2008		Advanced Fiberoptics Corporation	Zdeba
	Color Elasticity: Purple Color		11/7/2008 9:49		Materials			Advanced	

2. Click on tab for **All Projects** (all proposals & active projects)  
or  
**Closed/Withdrawn/Turned Down PAFs.**

Then, follow steps 1 through 3 from the Filter by procedure on page 1.

**Topic 4: Create a PAF**

Goal/outcome:

Provide hands on practice creating a PAF.

Objectives:

After completing this module, you will be able to:

- Add Key & Administrative Personnel.
  - Locate resources to create eRPM account & friends account.
  - Identify where to find DRDA policy regarding key personnel roles.
- Search for space & add space.
- Complete budget components.
- Attach documents.
  - Locate documents.
  - Upload and change documents.
  - Add document security.
- Use the jump to functionality.
- Check for errors (hide/show errors).

<b>Materials</b>	<b>Page</b>
Create a PAF: Basics (step by step procedure)	25
Create eRPM Account	31
Obtain a Friends Account	36
DRDA Principal Investigator Policy	41
Space – List of Buildings in eRPM	45
Working with Documents (step by step procedure)	55



## Create a PAF: Basics

This procedure details how to:

- **Create a PAF:** the fields that must be completed in order to create a PAF.
- **Hide/Show Errors:** the function that allows you to view a list of fields that need to be completed before the PAF can be routed for approval.
- **Route for Approval:** UM Principal Investigator or Primary Research Administrator can send PAF to units for review and approval.


### Important Information

- Red asterisk (\*) indicates a question that must be answered in order to route for approval.
- **\* Required to Save** indicates a question must be completed before you can save and leave the page.
- This procedure focuses on the minimum information needed to create, but not to complete, a PAF. For comprehensive demonstration of PAF completion, launch the PAF online training from the [eResearch Training page](#).

## CREATE A PAF

Specific fields must be completed in order to create a PAF.

### Home Workspace


Pat Investigator | My Home | Clipboard | Logoff

All PAFs

Folder for .

Roles

PI & Project Team

[Create New PAF](#)

[Create New User](#)

Support Links

[Need Training?](#)

[Share Feedback](#)

[Sandbox Updates](#)

Inbox
In Progress
Submitted to Sponsor
Award Received
Active
Closed
Cancelled
Not Funded

**PAFs with Required Action**

Filter by ID Go Clear Advanced

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor
09-PAF00110	Off-Label Uses for Grape Kool-Aid®	11/2/2008 3:08 PM	Proposal Preparation				
09-PAF00109	Color Elasticity; Blue's Flexibility Qualities?	11/2/2008 2:11 PM	Proposal Preparation				

**PAFs Not Yet Signed by PI**

Filter by ID Go Clear Advanced

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor
09-PAF00110	Off-Label Uses for Grape Kool-Aid®	11/2/2008 3:08 PM	Proposal Preparation				
09-PAF00109	Color Elasticity; Blue's Flexibility Qualities?	11/2/2008 2:11 PM	Proposal Preparation				

1. Click **Create New PAF** from Home Workspace

Last updated: 9/30/09

1 of 6

<http://eresearch.umich.edu>

Training Guide Last Updated: 10/01/2009

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New PAF

**1. General Information**

Complete all 6 sections of the PAF. Each section contains a series of pages. After all required questions are completed, the PI or Primary Administrative Contact will route the PAF for approval.

Required questions are noted with either:  
 \* **Required to Save** = Question must be completed before you can save and leave the page.  
 \* = Question must be completed before a proposal can be routed for approval.

**Introduction**

**2** 1.1 Project Title \* Required to Save

investigator\_pi - New PAF - Sun Nov 2 13:53:58 EST 2008

**?** HELP  
 Change default Project Title to match proposal title.  
 Limited to 256 characters. Identifies the proposal in the system.  
[Additional Help](#)

1.2 Long Title

**?** HELP  
 Optional  
 Use to capture the full proposal title if it is more than 256 characters and is abbreviated or not complete in the Project Title above. Only displays on this page and in the data warehouse.  
[Additional Help](#)

**2** 1.3 Is this a Grants.gov funding opportunity? \* Required to Save

If yes, information from the funding opportunity will be automatically entered on the Sponsor page of this project. Selecting 'Yes' does not require electronic submission.

Yes  No [Clear](#)

**?** HELP  
 Select Yes to link guidelines, forms, and submission instructions to proposal package.  
[Additional Help](#)

**2** 1.4 Is this a pre-proposal? \* Required to Save

Yes  No [Clear](#)

**?** HELP  
 Determines format of DRDA number.  
[Additional Help](#)

2. Complete questions 1.1, 1.3, and 1.4.

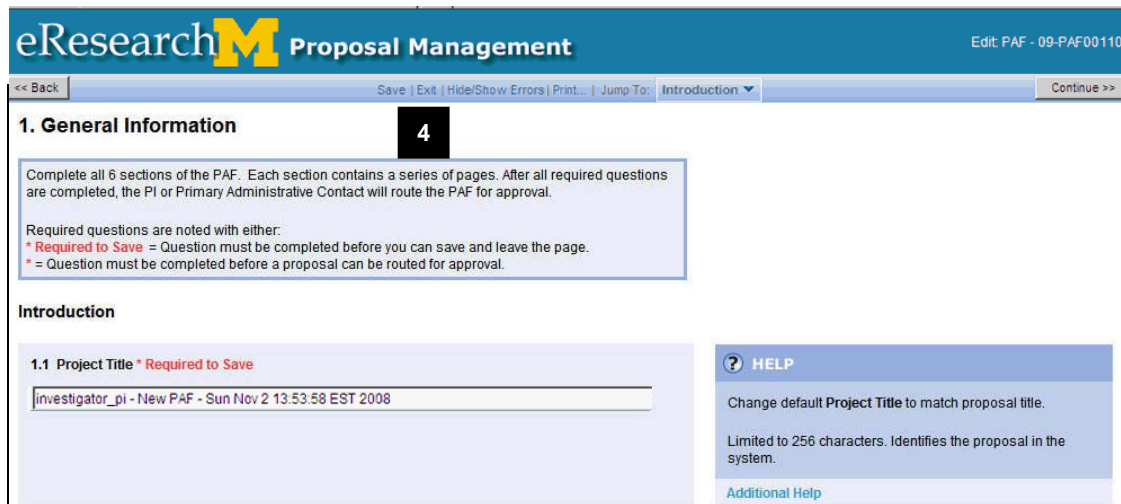
**Note:** These questions must be answered to save the page and create the PAF as indicated by \* **Required to Save**.

3. Create the PAF by clicking **Save**

**OR**

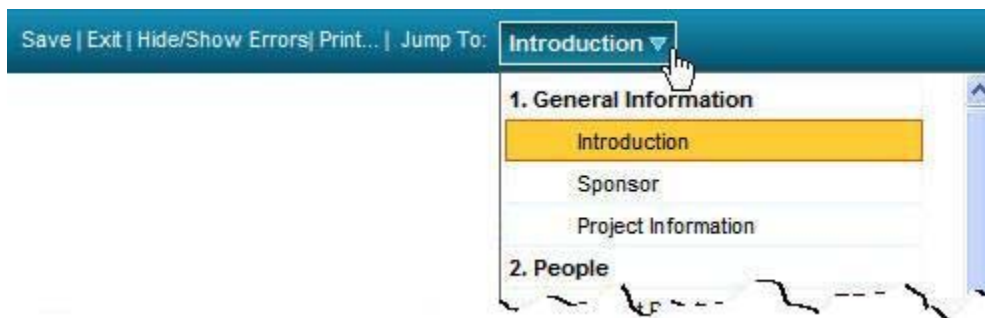
clicking **Continue** to save and move to the next page of the PAF.

PAF Worksheet



4. The PAF is created, and your PAF menu options expand to include:
- **Save:** Save page
  - **Exit:** Exit PAF Worksheet and returns you to Home Workspace. Prompts you to save page.
  - **Hide/Show Errors:** Validates that all fields required to route for approval are completed.
  - **Print:** Print page of PAF Worksheet.
  - **Jump To:** Can skip directly to pages of PAF Worksheet.

PAF Worksheet – Jump To



**Jump To** allows you to go directly to pages of the PAF Worksheet. It is recommended that you complete the PAF Worksheet in order through the Key Personnel section before starting to use **Jump To**.

## Hide/Show Errors

Use Hide/Show Errors to create a list of fields that need to be completed before the PAF can be routed for approval. If these fields are not completed, you will not be able to route for approval.

### PAF Worksheet – Hide/Show Errors

The screenshot shows the eResearch Proposal Management interface. At the top, there is a navigation bar with buttons for '<< Back', 'Save', 'Exit', 'Hide/Show Errors', 'Print...', and 'Jump To: Introduction'. A 'Continue >>' button is on the right. The main content area is titled '1. General Information' and contains instructions for completing the PAF sections. Below this, the 'Introduction' section is visible, with a '1.1 Project Title' field marked as '\* Required to Save'. A 'HELP' box provides instructions for the Project Title field. At the bottom, an 'ERROR/WARNING MESSAGES' box (labeled '2') lists four error messages in red. A 'Refresh' button (labeled '4') is located in the top right of the error box. A table (labeled '3') lists the error messages and their corresponding field names and jump-to links.

Message	Field Name	Jump To
You must select a sponsor.	Sponsor - Grants.gov	Sponsor - Grants.gov
You must enter the Sponsor Deadline or check the checkbox of No Sponsor Deadline.	Sponsor - Grants.gov	Sponsor - Grants.gov
You must enter at least one key term to describe the project.	Project Information	Project Information
Please answer question 2.2.	Key Personnel	Key Personnel

1. Click **Hide/Show Errors** to view a list of fields that are required to route for approval that are not completed.
2. Review the **Error/Warning Messages** that appear in red.
3. Click on the **Jump To** link within the **Error/Warning Messages** box to navigate to the page where the error is located.

**Important!** Make sure to save changes made on each page.

4. Click **Refresh** to validate that you fixed errors.

Note: Click **Hide/Show Errors** to turn off the Hide/Show error display (works like a toggle button).

5. Click **Exit** to save your changes and return to the PAF Workspace.

**Route for Approval**

Before you route for approval, you may want to request that the UM Principal Investigator sign the PAF/Conflict of Interest Statement because many departments will not approve unless the UM PI has signed the PAF/Conflict of Interest Statement.

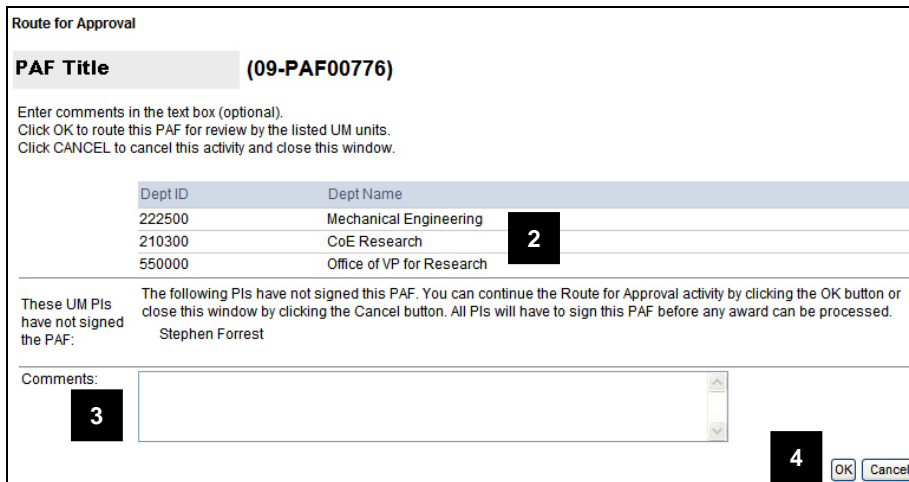
- Only the **UM Principal Investigator** or **Primary Research Administrator** can route for approval.

**PAF Workspace**



1. Click the **Route for Approval** activity from the PAF workspace.

**Route for Approval activity window**



2. Review the displayed Departments. If you notice that a department is not listed that needs to review the PAF, click Cancel and edit the PAF Worksheet.

**Note:** The departments included are based on your PAF Worksheet entries regarding Personnel, Cost Sharing, Space, Other Commitments, Subproject/Grants, and Administrative Home.

3. Add **Comments** if desired or required\*.  
\*If any of the UM PIs have not yet signed the PAF, you are required to enter a comment.
4. Click **OK**.

PAF Workspace

The screenshot shows the eResearchM Proposal Management interface. The current state is 'Unit Review'. A table titled 'Routing and Approval Status' is visible, with columns: Department, Department ID, Approved?, Date Approved, and Approval Note. The table lists three departments: Mechanical Engineering (222500, no, Pending), CoE Research (210300, no), and Office of VP for Research (550000, no). Callout 5 points to the table title, callout 6 to the 'Pending' status, callout 7 to the 'no' in the 'Approved?' column, and callout 8 to the 'Sponsors' section.

Notice that the current state of the PAF is now Unit Review.

5. The PAF Workspace now includes the Routing and Approval Status table.

**Note:** The Primary Research Administrator & UM Principal Investigator are sent an email to confirm that the PAF was routed for approval.

6. **Pending** appears by the department(s) whose turn it is to review the PAF.

**Notes:**

- The PAF appears in the **In Box** for Reviewers whose turn it is to review the PAF (Pending).
  - An email is sent to the department email contacts when it is a department's turn to review the PAF (Pending).
  - Even if it is not a department's turn to review a PAF (Pending), the reviewers from the department will be able to view the PAF in their **Upcoming** tab.
7. **Approved?** will change from "no" to "yes" when a department approves & the **Date Approved** will display.
8. If your PAF is stuck & you need to follow-up on its review status, click the name of the **Department** to view contacts for the department that you can call or email to find out more about the status of the department's review.

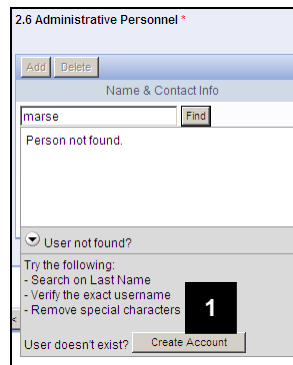
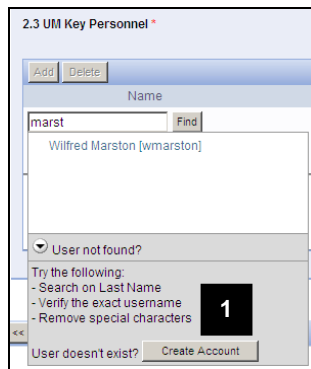
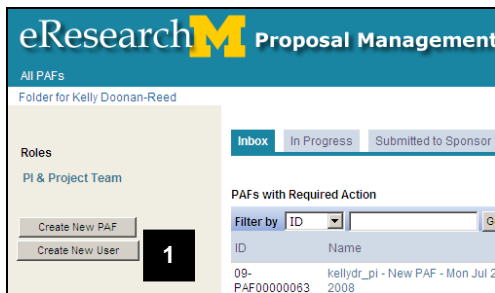
## Create an eResearch Account

If you cannot find a user in eResearch, you can create an eResearch account. If a person has logged into eResearch previously, he/she will have the PI/Project Team role. If you need to add a person who has never logged in before, you can create an account for :

- **UM Users:** A person associated with UM
- **Non-UM Users:** A person who does not have an affiliation with UM (a friends account will also need to be obtained)

### Important Information

- eResearch Regulatory Management and Proposal Management Accounts are created separately.



*Note:* If the user is not in the system, you may [Create A New User Account...](#)

1. You can start the process to create an eResearch account for Proposal Management, by clicking one of the following options:

**Create New User** button - from the Home Workspace (PI & Project Team or Reviewer)

**Create Account** button from the PAF Worksheet after clicking User not found when adding 2.3 UM Key Personnel or 2.6 Administrative Personnel

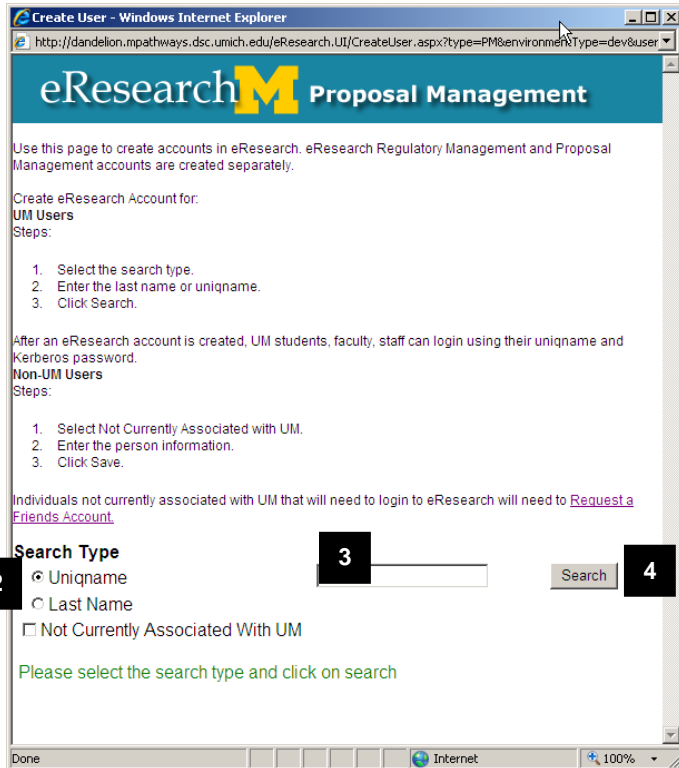
**Create Account** link from the Unit Liaison Management Department Information page

2. Follow the steps based on if you need to create an account for a UM User or a Non-UM user.



**CREATE ACCOUNT UM USER**

**Create Account - Window**



To create an eResearch Account for a person associated/affiliated with UM,

2. Select the search type.
3. Enter the **last name** or **uniqname**.
4. Click **Search**.

Note: After an eResearch account is created, UM students, faculty, staff can login using their uniqname and Kerberos password.

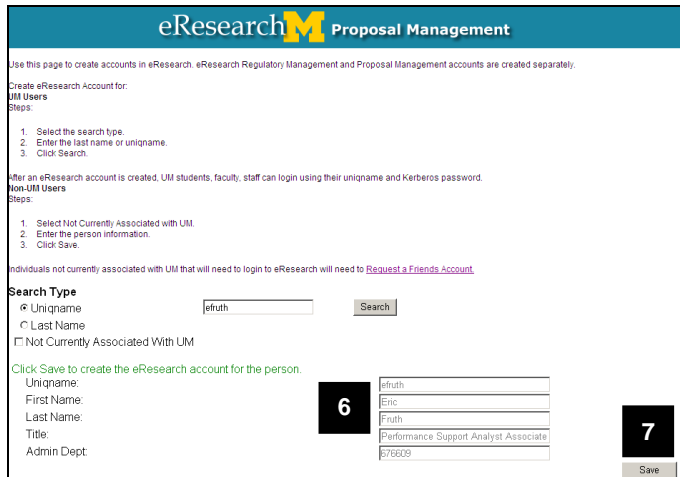
**Search Results - Create Account - Window**



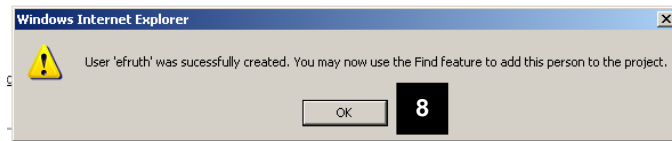
5. Click the **uniqname** of the person for whom you want to create an eResearch account.



Person Information - Create Account - Window



6. The information about the person for whom you want to create an account is displayed.
7. Click **Save** to create the eResearch account for the person.



8. The user was successfully created. Click **OK** to close the success confirmation.
- Note:** You will now be able to find this person in eResearch.

**CREATE ACCOUNT NON-UM USER**

**Create Account - Window**

Use this page to create accounts in eResearch. eResearch Regulatory Management and Proposal Management accounts are created separately.

Create eResearch Account for:  
**UM Users**  
Steps:  
1. Select the search type.  
2. Enter the last name or username.  
3. Click Search.

After an eResearch account is created, UM students, faculty, staff can login using their username and Kerberos password.

**Non-UM Users**  
Steps:  
1. Select Not Currently Associated with UM.  
2. Enter the person information.  
3. Click Save.

Individuals not currently associated with UM that will need to login to eResearch will need to [Request a Friends Account](#).

**Search Type**  
 Uniqname  
 Last Name  
 Not Currently Associated With UM

**Complete the required fields (\*) & click Save to create an eResearch account for a Non-UM user.**

**Important!** If the person will need access to the eResearch system, he/she will need to create a UM Friends account. This creates an ID to allow non-UM users to login into some UM systems.

He/she must create a UM Friends Account using the same preferred email address that you entered on this page. If the email addresses do not match, he/she will not be able to login to eResearch.

Individuals not currently associated with UM that will need to login to eResearch will need to [Request a Friends Account](#).

Honoric: \*

Preferred Email Address: \*

Retype Preferred Email Address: \*

First Name: \*

Last Name: \*

Street 1: \*

Street 2:

City: \*

State:

Zip: \*

Country: \*

Phone Business:

Fax Business:

\* Required

To create an eResearch Account for a person NOT associated/affiliated with UM:

**2. Select Not Currently Associated with UM**

- **Note:**
- You may want to first create a friends account. Click on the [Request a Friends Account](#) link to do so.
- For directions on how to create a friends account, see [Obtaining a Friends Account – Step-By-Step Procedure](#).

**Search Type**  
 Uniqname  
 Last Name  
 Not Currently Associated With UM

**Complete the required fields (\*) & click Save to create an eResearch account for a Non-UM user.**

**Important!** If the person will need access to the eResearch system, he/she will need to create a UM Friends account. This creates an ID to allow non-UM users to login into some UM systems.

He/she must create a UM Friends Account using the same preferred email address that you entered on this page. If the email addresses do not match, he/she will not be able to login to eResearch.

Individuals not currently associated with UM that will need to login to eResearch will need to [Request a Friends Account](#).

Honoric: \*

Preferred Email Address: \*

Retype Preferred Email Address: \*

First Name: \*

Last Name: \*

Street 1: \*

Street 2:

City: \*

State:

Zip: \*

Country: \*

Phone Business:

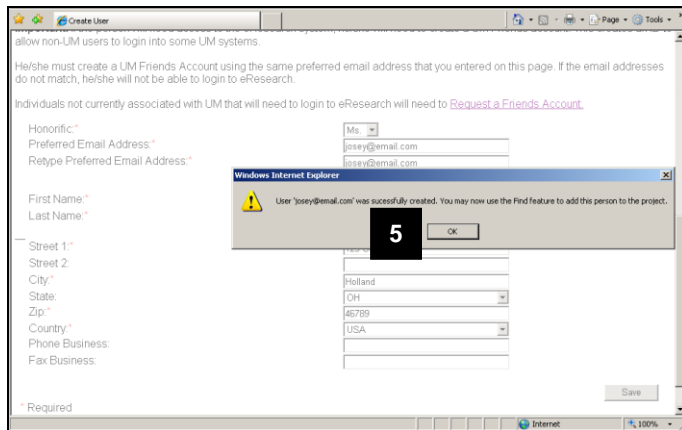
Fax Business:

\* Required

3. Enter the personal information. You are required to enter the following to save:

- Honoric**
- Email Address**
- First Name**
- Last Name**
- Address (Street 1, City, State, Zip County)**

4. Click **Save**.



5. The user was successfully created. Click **OK** to close the success confirmation.

**Note:** You will now be able to find this person in eResearch.

**Important!**

If the person will need to access to the eResearch system, he/she will need to create a UM Friends Account. This creates an ID to allow non-UM users to login into some UM systems.

He/she must create a UM Friends Account using the same preferred email address that you entered on this page. If the email addresses do not match, he/she will not be able to login to eResearch.

For directions on how to create a friends account, see [Obtaining a Friends Account – Step-By-Step Procedure](#).

## Obtaining a Friends Account

Non-U-M personnel can obtain access to eResearch by requesting a Friends account. Friends accounts are issued by Information Technology Central Services (ITCS) and allow non-U-M personnel access to many campus systems, including eResearch.

### Important Information

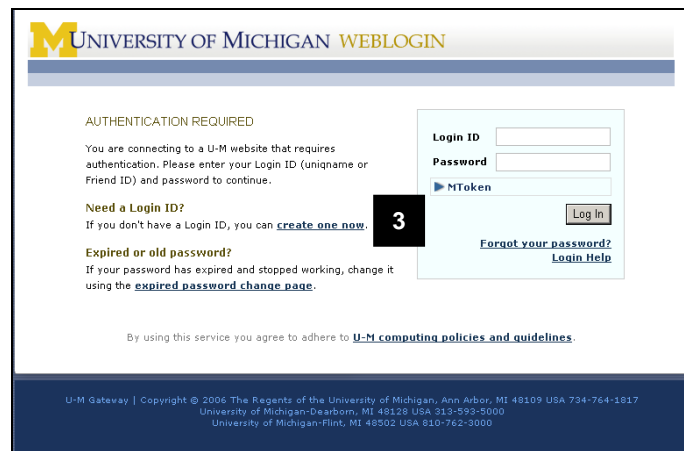
You must have a valid email address in order to obtain a Friends account.

### eResearch Home Page



1. Go to <http://eresearch.umich.edu/>.
2. Click **Login** under Proposal Management.

### UM Authentication Required Page



3. Click **create one now** to create a Friend ID.

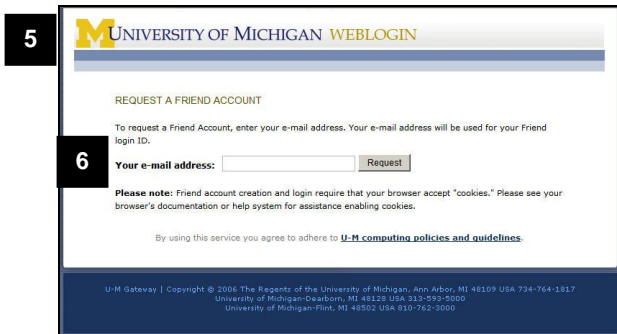
ITCS WEBLOGIN Page



- Click **Others** to view the full directions on How to Set Up a Friends Account.

**Note:** The directions are summarized in the steps below.

Request a Friend Account



- Go to <https://friend.weblogin.umich.edu/friend/>

- Enter your email address and click **Request**.

Friend Account Confirmation

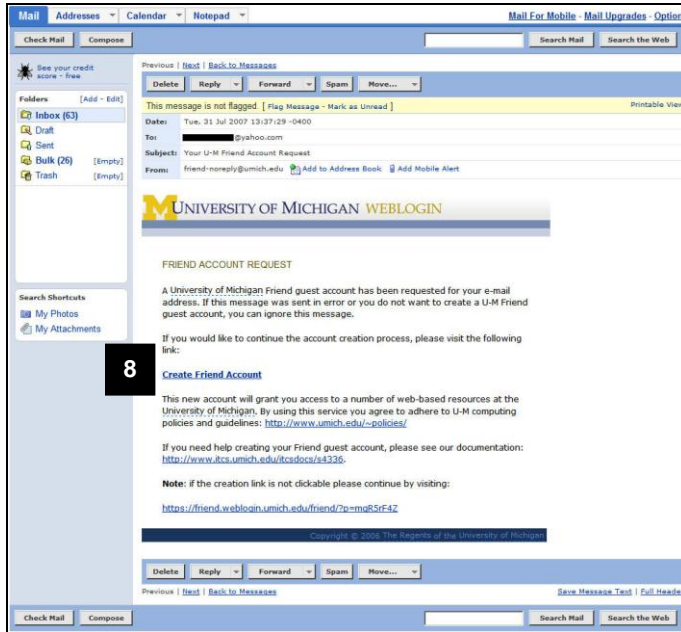


- Review the message sent confirmation screen.

**Notes:**

- An email from [friend-accounts@umich.edu](mailto:friend-accounts@umich.edu) will be sent to the address you entered.
- Allow up to an hour to receive the email.

### Friend Account Email



- 8. Click the **Create Friend Account** link in the e-mail from [friend-account@umich.edu](mailto:friend-account@umich.edu).

### Set Friend Account Password



- 9. Enter your **e-mail address**.
- 10. Enter and re-enter your **password**.
- 11. Click **Set Password**.



### Friend Account Created



12. Review your **Friend Account Created** confirmation.

### eResearch Home Page



13. Go to <http://eresearch.umich.edu/>.

14. Click **Log In** under Proposal Management.

### Cosign Login



15. Enter your **Login ID** (the e-mail you used to request access) and your **Password**.

16. Click .

Apply for Access Window

- 17. Enter your contact information, filling in all fields marked with a red star (\*).
- 18. Click **Submit**.

eResearch Home Workspace

ID	Name	Date Modified	State	PI	Dept	Sponsor	Deadline
08-PAF00000959	Affects on Grape Kool-aid on Hyperactivity Levels of Attention Deficit Hyperactivity Disorder Children	6/11/2008 1:47 PM	Proposal Preparation	Investigator			
08-PAF00000958	Affects on Grape Kool-aid on Hyperactivity Levels of Attention Deficit Hyperactivity Disorder Children	6/11/2008 1:39 PM	Proposal Preparation	Investigator			
08-PAF00000954	sat. pi - New PAF - Wlad Jun 11 11:10:24 EDT 2008	6/11/2008 11:10 AM	Proposal Preparation	Investigator			
08-PAF00000522	Collaborative Research: Gender, Race, and Identity Development in Black Youth	2/12/2008 11:28 PM	ORDA Requests Change	Rowley	LSSA Psychology Department		
08-PAF00000524	Detecting Functional Network Structures from Neural Activity	2/6/2008 10:56 AM	Reviewer Requests Change	Zochowski	LSSA-Physics Department		2/8/2008
08-PAF00000523	Neurocognitive	2/6/2008 10:56 AM	Reviewer Requests Change	Rowley	LSSA		

- 19. You now have access to eResearch and your Home Workspace is displayed.

[http://www.drda.umich.edu/proposals/principal\\_investigator.html](http://www.drda.umich.edu/proposals/principal_investigator.html)

## RESEARCH ADMINISTRATION



[A-Z INDEX](#) | [GLOSSARY](#) | [NEWS](#) | [RA TOOLKIT](#) | [SITE MAP](#) | [CONTACT US](#)

[View Printer Friendly Version](#)

# Definition of a Principal Investigator

The University research community has an interest in recognizing both the holder of the award with the sponsor and the person serving as institutional oversight (if different). In order to accomplish this, the University research community recognizes two types of eligible Principal Investigators.

## Policy

The University recognizes the applicant to the sponsor as the Sponsor Principal Investigator. The institution will allow anyone employed by Michigan who meets the sponsor's guidelines for eligibility to serve in this capacity.

The University will recognize the same individual as the UM Principal Investigator as long as the employment criteria and level of independence associated with the current job title as defined below is met.

If the Sponsor Principal Investigator does not meet the University's criteria for UM Principal Investigator, another individual meeting the requirements is to be named in order to provide internal guidance and leadership for the scientific, technical, administrative, and financial aspects of a sponsored project.

In most cases, the Sponsor-eligible Principal Investigator and UM-eligible Principal Investigator will be the same individual and is to be named in the Principal Investigator field of the Proposal Approval Form (PAF). In cases when an individual does not qualify as both the Sponsor and UM Principal Investigator, both must be named on the PAF.

Additionally, the University will recognize multiple individuals serving as Sponsor or UM Principal Investigators when the sponsor explicitly allows it.

For the purposes of this policy statement, the term Principal Investigator shall encompass other sponsor-specific titles such as Project Director and Program Director that are typically used for non-research sponsored projects.

## **Definitions**

A **Sponsor Principal Investigator** is an employee or student of the University of Michigan who meets the eligibility requirements of the sponsor.

Certain sponsored project competitions are directed specifically to the support of individual students, fellows, or other non-permanent employees. Examples include doctoral dissertation awards and individual pre-and postdoctoral fellowship programs. The proposal format typically requires that the individual applicant (e.g., the student or fellow) be identified in the application as the Principal Investigator.

In these situations, that individual will be identified on the PAF as the Sponsor Principal Investigator. The designation should be used only in these circumstances and requires the designation of a separate UM Principal Investigator on the PAF.

Requests for exceptions to the employee / student requirement can be considered, provided the individual has some other affiliation with the University (e.g., Visiting Scholar) and the unit head for administrative home for the project endorses the request.

The **UM Principal Investigator** is a University of Michigan employee having the background and training in scientific and administrative oversight necessary to conduct and manage a sponsored project. The individual must be treated by the appointing unit as an independent investigator and by the University as a non-temporary employee. The expectation is that eligible UM PIs will submit proposals through their primary appointing unit unless other arrangements have been explicitly approved, by the units involved.

The UM Principal Investigator is considered independent if s/he is a tenure-track faculty (Instructor through Professor), a research faculty (Research Investigator through Research Professor), or holds a Clinical professorial appointment. With unit approval, Emeritus faculty may also be appointed as UM Principal Investigators.

In addition, Archivists, Curators, and Librarians in units that typically use these titles, are eligible to serve as UM Principal Investigators, if approved by the head of the unit.

Regardless of experience and education, Research Associates, Research Assistants, and other staff are not considered to be independent investigators. In general, only on rare occasions will personnel who are not tenure-track or research faculty be permitted to serve as UM Principal Investigators on research projects.

If a UM Principal Investigator leaves the University prior to the end of a sponsored project, leadership arrangements for the duration of the project should be discussed with the unit, DRDA, and the sponsor, in advance of departure.

## **Exceptions:**

Each of the following is an exception to the generally applicable PI eligibility limitations described above. DRDA Project Representatives will review each PI exception request (process described below) and grant approval of the exception on a case-by-case basis. In some situations DRDA will consider the exception only if certain conditions are met:

- Since Lecturers and Visiting and Adjunct appointments are not permanent, Visiting and Adjunct Faculty (instructional and research) will only be permitted to be Principal Investigators if the unit supports the appointment and the individual draws his or her salary through the University (i.e., they must be paid employees). Any request for exception requires a written document from the Dean supporting the PI assignment and explaining why the exception is necessary. The document must accompany each PAF to which the exception applies.
- Heads of non-research and non-teaching units are occasionally permitted to be Principal Investigators on projects considered to be within the scope of their duties.
- Proposals have been processed from individuals who are not permanent or independent but for whom the promotion to an eligible position, prior to award, is assured by the department and the school. This must be noted on the PAF.
- Proposals are routinely processed for individuals who have accepted PI-eligible positions at the University, but who are not yet employees. The expectation is that their University appointment will be effective on or after the proposed effective date of the sponsored project.

Unit Heads are reminded that fiscal and program responsibility for the project may revert to their office if, for any reason, the Principal Investigator is unable to complete the assignment.

## **Multiple Principal Investigators**

Two or more UM Principal Investigators can be designated for a project if the sponsoring agency explicitly permits Multiple Principal Investigators or Co-Principal Investigators. The Multiple/Co-PIs share authority for leading and directing the project, intellectually, logistically, and financially. Each PI is responsible and accountable for the proper conduct of the project, including the submission of all required reports. The designation of Multiple or Co-UM Principal Investigators for a single project diminishes neither the responsibility nor the accountability on any individual PI.

One of the Multiple/Co-UM PIs must be designated as the Contact Principal Investigator.

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## **Other Titles used for UM Key Personnel in the eResearch Proposal Management System**

### **Participating Investigator, With Specified Effort**

Refers to other UM investigators a) who contribute in a substantive, measurable way to the

scientific development or execution of the project, b) who generally are PI-eligible under existing UM policies, and c) who have effort specified and quantified in the external proposal, whether or not salaries are requested. The Proposal Approval Form will be routed to the units for these individuals.

**Participating Investigator, Without Specified Effort**

Refers to other UM investigators a) who are involved in the scientific development and execution of the project, and b) who generally are PI-eligible under existing UM policies, but c) who have no specified or quantified effort in the external proposal. The Proposal Approval Form will not be routed to the units for these individuals.

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Last reviewed: November, 2008

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## Proposal Preparation & Unit Review Training Guide

This spreadsheet lists all buildings in the eResearch Proposal Management (eRPM) system as of **3/24/2009**. You will find the most up to date information in eRPM. There is a nightly feed from the M-Pathways Financials system to eResearch Proposal Management system.

If changes are required, please have changes made in M-Pathways Financials System via the Space Survey or other mechanism.

The list is sorted in alphabetical order by the building name.

**Format of the building name:**

Building Long Title (building abbreviation)  
e.g., BAGNOUD FRANCOIS-XAVIER BUILDI (FXB)

**Search Tips:**

If you want to search by the building abbreviation in eResearch, you must use the wildcard (%).  
E.g., %FXB% to search for BAGNOUD FRANCOIS-XAVIER BUILDING

If you do not use the wildcard when searching for building abbreviations, your search will not find any buildings because the system recognizes the parenthesis as part of the abbreviation, e.g., "(FXB)"

1009 CORNWELL (1009CRNWEL)	
101 SIMPSON RD (101SIMPSON)	
1011 CORNWELL PL (1011CRNWLL)	
1013 CORNWELL (1013CRNWEL)	
1014 CORNWELL PL (1014CRNWL)	
1018 FULLER BUILDING	ARBOR LAKES 1 (ARB LKS 1)
1018 FULLER BUILDING (1018 FULLR)	ARBOR LAKES 2
1019 FERDON RD (1019FERDON)	ARBOR LAKES 2 (ARB LKS 2)
1024 MAIDEN LANE (1024MAIDEN)	ARBOR LAKES 3
1025 WALL STREET (1025 WALL)	ARBOR LAKES 3 (ARB LKS 3)
1027 EAST HURON BUILDING	ARGUS BUILDING (ARGUS1)
1027 EAST HURON BUILDING (1027EHURON)	ARGUS II (ARGUS2)
1032 GREENE BUILDING (1032GREENE)	ART & ARCHITECTURE BUILDING
1035 WALL (1035 WALL)	ART ARCHITECTURE BUILDING (ART ARCH)
113 W MICHIGAN AVENUE (113 W MICH)	ASIAN STUDIES (ASIAN STDS)
1250 N MAIN (1250N MAIN)	ATH CREW BOATHOUSE FACILITY (AC BTHSFAC)
126 E HOOVER (126 E HOOV)	ATHLETICS MAINTENANCE BUILDING (ATH MTNCE)
1322 WILMOTT (1322WILMOT)	AUTO ENGR LAB FUEL MIXING BLDG
1327 GEDDES (1327GEDDES)	AUTO LAB FUEL STORAGE BUILDING (FUELSTORAG)
1580 ELLSWORTH ROAD (1580ELLSW)	AUXILIARY SERVICES BUILDING 1 (AUX SERV 1)
1631 SOUTH STATE (1631SSTATE)	BAGNOUD FRANCOIS-XAVIER BUILDI (FXB)
1717 E MONROE (1717 MONRO)	BAITS VERA I EATON HOUSE (VB1 EATON)
1736 BROADWAY GARAGE (1736BDWY G)	BAITS VERA I LEE HOUSE (VB1 LEE)
1736 BROADWAY HOUSE (1736BDWY H)	BAITS VERA I PARKER HOUSE (VB1 PARKER)
1775 E MONROE	BAITS VERA I SMITH HOUSE (VB1 SMITH)
19855 W OUTER DRIVE (19855WOUTR)	BAITS VERA I STANLEY HOUSE (VB1 STANLE)
202 SOUTH THAYER BUILDING (202 S THAY)	BAITS VERA II COMAN HOUSE (VB2 COMAN)
207 CANYON BLVD	BAITS VERA II CONGER HOUSE (VB2 CONGER)
2090 HURON VALLEY PROFESS CTR (2090 HVPC)	BAITS VERA II CROSS HOUSE (VB2 CROSS)
2094 HURON VALLEY PROFESS CTR (2094 HVPC)	BAITS VERA II THIEME HOUSE (VB2 THIEME)
2311-2323 GREEN ROAD	BAITS VERA II ZIWET HOUSE (VB2 ZIWET)
2800 PLYMOUTH ROAD (2800PLYMOU)	BARBOUR BETSY HOUSE (B BARBOUR)
2929 PLYMOUTH (2929PLYMOU)	BARRON BUILDING (BARRON BLD)
300 N INGALLS BUILDING	BASE LINE FARM EGG HOUSE (BLF EGG HS)
300 N INGALLS BUILDING (300 NIB)	BASE LINE GARAGE SHOP #1 (BLF GRSH1)
306 S STATE (306S STATE)	BASE LINE LAKE FARM HOUSE (BLF HOUSE)
311 MAYNARD	BASE LINE LAKE GARAGE SHOP #2 (BLF GRSH2)
320 W ANN (320 W ANN)	BASE LINE LAKE STORAGE SHOP (BLF STR SH)
3600 GREEN COURT (3600 GREEN)	BASE LINE LAKE WARMING SHED (BLF WM SHD)
3800 W GRAND BLVD-SURVIVAL FLT (3800WGRAND)	BENTLEY HISTORICAL LIBRARY (BENTLEY)
431 GLEN AVE (431 GLEN)	BIO ST LABORATORY-STORAGE BLDG (BS LABSTOR)
5025 VENTURE	BIOLOGICAL ST ASST SUPERINTEN (B S ASUPER)
5025 VENTURE (5025VENTUR)	BIOLOGICAL ST BLANCHARD (B S BLANCH)
511 GLEN AVE (511 GLEN)	BIOLOGICAL ST CABIN A2 (B S A2)
555 SOUTH FOREST BUILDING	BIOLOGICAL ST CABIN A4 (B S A4)
555 SOUTH FOREST BUILDING (555 FOREST)	BIOLOGICAL ST CABIN A6 (B S A6)
574 S MANSFIELD (574 S MANS)	BIOLOGICAL ST CABIN A8 (B S A8)
631 OXFORD (631 OXFORD)	BIOLOGICAL ST CABIN C2 (B S C2)
712 OAKLAND (712 OAKLND)	BIOLOGICAL ST CABIN C4 (B S C4)
715 E HURON (715 E HUR)	BIOLOGICAL ST CABIN C6 (B S C6)
717 E HURON (717 E HUR)	BIOLOGICAL ST CABIN C8 (B S C8)
86 ELIOT ST (86 ELIOT)	BIOLOGICAL ST CABIN D1 (B S D1)

## Proposal Preparation & Unit Review Training Guide

ACADEMIC SUPPORT CENTER (ASC)	BIOLOGICAL ST CABIN D3 (B S D3)
ADMINISTRATION BLDG (AB)	BIOLOGICAL ST CABIN D5 (B S D5)
ADMINISTRATIVE SERVICES (AD SERV)	BIOLOGICAL ST CABIN D7 (B S D7)
AERO ENG LAB-PLASMA RESEARCH (AE PLASMA)	BIOLOGICAL ST CABIN ES10 (B S ES10)
AERO ENG LAB-PROPULSION LAB (AE PROPULS)	BIOLOGICAL ST CABIN ES11 (B S ES11)
AERO ENG LAB-PUMPING STATION (AE PUMP ST)	BIOLOGICAL ST CABIN ES12 (B S ES12)
AERO ENG LAB-WIND TUNNEL LAB	BIOLOGICAL ST CABIN ES14 (B S ES14)
AERO ENG LAB-WIND TUNNEL LAB (AE TUNNEL)	BIOLOGICAL ST CABIN ES16 (B S ES16)
AERO ENG POWER PLANT (AE PWR PLT)	BIOLOGICAL ST CABIN ES18 (B S ES18)
AIRPORT PLAZA - 3815 PLAZA DRI (3815 PLAZA)	BIOLOGICAL ST CABIN ES18AB (B S ES18AB)
AIRPORT PLAZA - 738 AIRPORT (738 AIRPRT)	BIOLOGICAL ST CABIN ES19 (B S ES19)
ALUMNI CENTER (ALUMNI)	BIOLOGICAL ST CABIN ES20 (B S ES20)
AMBULATORY SURGICAL CENTER (AMBSURGCTR)	BIOLOGICAL ST CABIN ES21 (B S ES21)
ANGELL HALL AUDITORIUMS (ANGELL AUD)	BIOLOGICAL ST CABIN ES22 (B S ES22)
ANGELL HALL TISCH HALL (ANGELL)	BIOLOGICAL ST CABIN ES23 (B S ES23)
ANGELL JAMES B HALL & TISCH HALL	BIOLOGICAL ST CABIN ES24 (B S ES24)
ANIMAL RESEARCH FACILITY	BIOLOGICAL ST CABIN ES4 (B S ES4)
ANIMAL RESEARCH FACILITY (ARF)	BIOLOGICAL ST CABIN ES6 (B S ES6)
ANN ARBOR COMMERCE PARK (AA COMM PK)	BIOLOGICAL ST CABIN ES7 (B S ES7)
ANN ARBOR ICE CUBE (ICE CUBE)	BIOLOGICAL ST CABIN ES8 (B S ES8)
ANN ARBOR INSTITUTE BUILDING (AA INST BL)	BIOLOGICAL ST CABIN ES9 (B S ES9)
ARB ATRIUM (ARB ATRIUM)	BIOLOGICAL ST CABIN UDE 2 (B S UDE2)
ARBOR HEIGHTS BUILDING (ARBOR HTS)	BIOLOGICAL ST CABIN UDE 3 (B S UDE3)
ARBOR HEIGHTS TRAILERS (ARB HTS TR)	BIOLOGICAL ST CABIN UDE1 (B S UDE1)
ARBOR LAKES 1	BIOLOGICAL ST CABIN UDW1 (B S UDW1)
BIOLOGICAL ST CABIN UDW10 (B S UDW10)	BIOLOGICAL ST STREAMSIDE LAB (B S STRLAB)
BIOLOGICAL ST CABIN UDW11 (B S UDW11)	BIOLOGICAL ST SUPERINTENDENT H (B S SUPER)
BIOLOGICAL ST CABIN UDW12 (B S UDW12)	BIOLOGICAL ST WELCH LABORATORY (B S WCHLAB)
BIOLOGICAL ST CABIN UDW13 (B S UDW13)	BIOMED SCIENCE RESEARCH BLDG (BSRB)
BIOLOGICAL ST CABIN UDW14 (B S UDW14)	BIOMEDICAL SCIENCE RESEARCH BUILDING
BIOLOGICAL ST CABIN UDW15 (B S UDW15)	BIRKENSTOCK BUILDING (BIRKENSTOC)
BIOLOGICAL ST CABIN UDW16 (B S UDW16)	BONISTEEL INTERDISCIP RESEARCH (BIRB)
BIOLOGICAL ST CABIN UDW17 (B S UDW17)	boyer
BIOLOGICAL ST CABIN UDW18 (B S UDW18)	BOYER BUILDING (BOYER)
BIOLOGICAL ST CABIN UDW19 (B S UDW19)	BRADFORD BUILDING
BIOLOGICAL ST CABIN UDW2 (B S UDW2)	BRADFORD BUILDING (BRADFORD)
BIOLOGICAL ST CABIN UDW20 (B S UDW20)	BRAYTON BUILDING (BRAYTON)
BIOLOGICAL ST CABIN UDW21 (B S UDW21)	BRIARWOOD 1 (BRWD1)
BIOLOGICAL ST CABIN UDW22 (B S UDW22)	BRIARWOOD 10 (BRWD10)
BIOLOGICAL ST CABIN UDW23 (B S UDW23)	BRIARWOOD 2 (BRWD2)
BIOLOGICAL ST CABIN UDW24 (B S UDW24)	BRIARWOOD 3 (BRWD3)
BIOLOGICAL ST CABIN UDW26 (B S UDW26)	BRIARWOOD 4 (BRWD4)
BIOLOGICAL ST CABIN UDW28 (B S UDW28)	BRIARWOOD 5 (BRWD5)
BIOLOGICAL ST CABIN UDW29 (B S UDW29)	BRIARWOOD 9
BIOLOGICAL ST CABIN UDW3 (B S UDW3)	BRIARWOOD 9 (BRWD9)
BIOLOGICAL ST CABIN UDW30 (B S UDW30)	BRIGHTON HLTH CTR (BRIGHTON)
BIOLOGICAL ST CABIN UDW31 (B S UDW31)	BROWN G G LABORATORY (GG BROWN)
BIOLOGICAL ST CABIN UDW4 (B S UDW4)	BROWN GEORGE GRANGER MEMORIAL LABORATORIES
BIOLOGICAL ST CABIN UDW5 (B S UDW5)	BUHL RES CEN FOR HUMAN GENETIC (BUHL)
BIOLOGICAL ST CABIN UDW6 (B S UDW6)	BUHR BUILDING (BUHR)
BIOLOGICAL ST CABIN UDW7 (B S UDW7)	BURLINGTON OFFICE CTR (BURLINGTON)
BIOLOGICAL ST CABIN UDW8 (B S UDW8)	BURNHAM HOUSE (BURNHAM)
BIOLOGICAL ST CABIN UDW9 (B S UDW9)	BURSLEY HALL (BURSLEY)
BIOLOGICAL ST CABIN WS1 (B S WS1)	BURTON MEMORIAL TOWER (BURTON)
BIOLOGICAL ST CABIN WS10 (B S WS10)	BUSINESS ADMIN EXECUTIVE DORM (EXEC RES)
BIOLOGICAL ST CABIN WS11 (B S WS11)	CAMP DAVIS ADVANCED CLASSROOM (CD ADVCLSS)
BIOLOGICAL ST CABIN WS12 (B S WS12)	CAMP DAVIS BATH HOUSE (CD BATHHSE)
BIOLOGICAL ST CABIN WS13 (B S WS13)	CAMP DAVIS BLANKET STORAGE (CD BLNKT)
BIOLOGICAL ST CABIN WS14 (B S WS14)	CAMP DAVIS CABIN 10A (CD CAB10A)
BIOLOGICAL ST CABIN WS15 (B S WS15)	CAMP DAVIS CABIN 1A (CD CAB1A)
BIOLOGICAL ST CABIN WS16 (B S WS16)	CAMP DAVIS CABIN 1B (CD CAB1B)
BIOLOGICAL ST CABIN WS17 (B S WS17)	CAMP DAVIS CABIN 1C (CD CAB1C)
BIOLOGICAL ST CABIN WS18 (B S WS18)	CAMP DAVIS CABIN 1E (CD CAB1E)
BIOLOGICAL ST CABIN WS19 (B S WS19)	CAMP DAVIS CABIN 1F (CD CAB1F)
BIOLOGICAL ST CABIN WS20 (B S WS20)	CAMP DAVIS CABIN 2A (CD CAB2A)
BIOLOGICAL ST CABIN WS21 (B S WS21)	CAMP DAVIS CABIN 2B (CD CAB2B)
BIOLOGICAL ST CABIN WS3 (B S WS3)	CAMP DAVIS CABIN 2C (CD CAB2C)
BIOLOGICAL ST CABIN WS5 (B S WS5)	CAMP DAVIS CABIN 2D (CD CAB2D)

## Proposal Preparation & Unit Review Training Guide

BIOLOGICAL ST CABIN WS6 (B S WS6)	CAMP DAVIS CABIN 2E (CD CAB2E)
BIOLOGICAL ST CABIN WS7 (B S WS7)	CAMP DAVIS CABIN 3A (CD CAB3A)
BIOLOGICAL ST CABIN WS8 (B S WS8)	CAMP DAVIS CABIN 3B (CD CAB3B)
BIOLOGICAL ST CABIN WS9 (B S WS9)	CAMP DAVIS CABIN 3D (CD CAB3D)
BIOLOGICAL ST CARPENTER SHOP (B S CRPNTR)	CAMP DAVIS CABIN 3E (CD CAB3E)
BIOLOGICAL ST CHEMICAL STORAGE (B S CHEMST)	CAMP DAVIS CABIN 3F (CD CAB3F)
BIOLOGICAL ST CO2 LAB (BS COS LAB)	CAMP DAVIS CABIN 4A (CD CAB4A)
BIOLOGICAL ST CORT LABORATORY (B S CRTLAB)	CAMP DAVIS CABIN 4B (CD CAB4B)
BIOLOGICAL ST CREASER LAB (B S CRELAB)	CAMP DAVIS CABIN 4C (CD CAB4C)
BIOLOGICAL ST DINING ADMIN (B S DIN&AD)	CAMP DAVIS CABIN 4D (CD CAB4D)
BIOLOGICAL ST DIR RES ES50 (B S DIRRES)	CAMP DAVIS CABIN 5A (CD CAB5A)
BIOLOGICAL ST FACULTY HSE ES26 (BS FH ES26)	CAMP DAVIS CABIN 5C (CD CAB5C)
BIOLOGICAL ST FACULTY HSE ES27 (BS FH ES28)	CAMP DAVIS CABIN 5D (CD CAB5D)
BIOLOGICAL ST FACULTY HSE ES29 (BS FH ES29)	CAMP DAVIS CABIN 5E (CD CAB5E)
BIOLOGICAL ST FACULTY HSE ES30 (BS FH ES30)	CAMP DAVIS CABIN 5F (CD CAB5F)
BIOLOGICAL ST FACULTY HSE ES32 (BS FH ES32)	CAMP DAVIS CABIN 6A (CD CAB6A)
BIOLOGICAL ST FACULTY HSE ES34 (BS FH ES34)	CAMP DAVIS CABIN 6B (CD CAB6B)
BIOLOGICAL ST FACULTY HSE ES36 (BS FH ES36)	CAMP DAVIS CABIN 6C (CD CAB6C)
BIOLOGICAL ST FACULTY HSE ES38 (BS FH ES38)	CAMP DAVIS CABIN 6D (CD CAB6D)
BIOLOGICAL ST FACULTY HSE ES40 (BS FH ES40)	CAMP DAVIS CABIN 6E (CD CAB6E)
BIOLOGICAL ST FACULTY HSE ES42 (BS FH ES42)	CAMP DAVIS CABIN 7A (CD CAB7A)
BIOLOGICAL ST FACULTY HSE ES44 (BS FH ES44)	CAMP DAVIS CABIN 7B (CD CAB7B)
BIOLOGICAL ST FACULTY HSE ES46 (BS FH ES46)	CAMP DAVIS CABIN 7C (CD CAB7C)
BIOLOGICAL ST FACULTY HSE ES48 (BS FH ES48)	CAMP DAVIS CABIN 7D (CD CAB7D)
BIOLOGICAL ST FOREST COTT ES25 (BSCOT ES25)	CAMP DAVIS CABIN 7E (CD CAB7E)
BIOLOGICAL ST FOREST LABORATOR (B S FORLAB)	CAMP DAVIS CABIN 7F (CD CAB7F)
BIOLOGICAL ST G R LARUE LIBRAR (B S GRLLIB)	CAMP DAVIS CABIN 8A (CD CAB8A)
BIOLOGICAL ST GARAGE (B S GARAGE)	CAMP DAVIS CABIN 8B (CD CAB8B)
BIOLOGICAL ST HEALTH SERVICE E (B S HLS ES2)	CAMP DAVIS CABIN 8D (CD CAB8D)
BIOLOGICAL ST HILLTOP HOUSE I (B S HTH1)	CAMP DAVIS CABIN 8E (CD CAB 8E)
BIOLOGICAL ST HILLTOP HOUSE II (B S HTH2)	CAMP DAVIS CABIN 9A (CD CAB9A)
BIOLOGICAL ST HOUGHTON LAB (B S HTNLAB)	CAMP DAVIS CABIN 9B (CD CAB9B)
BIOLOGICAL ST HUNGERFORD LAB (B S HGRLAB)	CAMP DAVIS DORM #2 (CD DRM2)
BIOLOGICAL ST LECTURE HALL (B S LECTUR)	CAMP DAVIS DORMITORY #1 (CD DRM1)
BIOLOGICAL ST MGR HOUSE ES27 (BSMGR ES27)	CAMP DAVIS EARDLEY CABIN (CD EARDLEY)
BIOLOGICAL ST NEWCOMBE LAB (B S NEWLAB)	CAMP DAVIS EDUCATION BLDG 440 (CD ED BLD)
BIOLOGICAL ST NICHOLS LAB (B S NICLAB)	CAMP DAVIS FACULTY CABIN 1D (CD FCLTY1D)
BIOLOGICAL ST PETTINGILL LAB (B S PETLAB)	CAMP DAVIS FACULTY CABIN 6F (CD FCLTY6F)
BIOLOGICAL ST REIGHARD LAB (B S REILAB)	CAMP DAVIS GARAGE (CD GARAGE)
BIOLOGICAL ST RES BIOLOGIST HS (B S RESBIO)	CAMP DAVIS INSTRUMENT SHOP (CD INSTRMT)
BIOLOGICAL ST RES GREENHOUSE (B S GRNHSE)	CAMP DAVIS INTRO CLASSRM (CD INTRO)
BIOLOGICAL ST RESIDENCE HALL (B S RESHAL)	CAMP DAVIS JOHNSTON HALL (CD JOHNSTN)
BIOLOGICAL ST SAWMILL STORAG (B S SAWMIL)	CAMP DAVIS KEEPER HOUSE (CD KEEPER)
BIOLOGICAL ST SCIENTIST RES (B S SCIRES)	CAMP DAVIS LOG CABIN (CD LOG CAB)
BIOLOGICAL ST SOIL BIOTRON (B S SOIL)	CAMP DAVIS MESS HALL (CD MESS)
BIOLOGICAL ST SPARROW LAB (B S SPALAB)	CAMP DAVIS SHOP (CD SHOP)
BIOLOGICAL ST STOCKARD LAB	CAMP DAVIS STORAGE BARN (CD STORBRN)
BIOLOGICAL ST STOCKARD LAB (B S STKLAB)	CAMP DAVIS STUDENT CABIN 8C (CD STCAB8C)
BIOLOGICAL ST STORAGE (B S STORAG)	CAMP DAVIS STUDENT CABIN 9C (CD STCAB9C)
BIOLOGICAL ST STORAGE A3 (B S STORA3)	CAMPUS ARCADE
BIOLOGICAL ST STORAGE SHED #1 (B S STOR#1)	CAMPUS ARCADE (CAMP ARCAD)
CAMPUS SAFETY SERVICES BUILDIN (CSSB)	FACILITIES SERVICES BUILDING B (FAC SVC B)
CAMPUS SUPPORT SERVICES (CSS)	FACILITIES SERVICES BUILDING C (FAC SVC C)
CANCER CENTER	FAIR LANE COTTAGE EAST 3 (FLC E)
CANCER CENTER (CANCER CTR)	FAIR LANE COTTAGE NORTH 2 (FLC N)
CANHAM DONALD B NATATORIUM (CANHAM)	FAIR LANE COTTAGE SOUTH 1 (FLC S)
CANTON HLTH CTR (CANTONHLTH)	FAIR LANE GREENHOUSE (FLGH)
CARDIOVASCULAR CENTER (CARDIO CEN)	FAIR LANE PONY BARN (FLPB)
CARVER BUILDING (CARVER)	FAIR LANE POWERHOUSE (FLPH)
CASL ANNEX (CA)	FAIRLANE CENTER (FC)
CATHERINE ST PARKING STRUCTURE (CATHERINE)	FERRY FIELD LOCKER ROOMS (FF LKR)
CCRB STORAGE FACILITY (CCRB STOR)	FIELDHOUSE AND WELLNESS CTR (FH WC)
CENTRAL CAMPUS REC BLD & BELL MARGARET POOL	FIRE SERV INSTR RES CENTER (FIRE SERV)
CENTRAL CAMPUS REC BLD BELL PO (CCRB)	FISHER RAY BASEBALL STADIUM (FISHER)
CENTRAL POWER PLANT (CPP)	FL MILL STREET PARKING STRU (FL MILL ST)
CHANCELLORS RESIDENCE (CHL RES)	FL NORTHBANK CTR (FL NRTHBNK)
CHELSEA FAMILY PRACTICE (CHELSEA)	FL NORTHBANK PARKING RAMP (FL NTHBK P)
CHEMISTRY & DOW WILLARD H LABORATORY	FL UNIV PAVIL ANNEX (FL PAVANNX)

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CHEMISTRY (CHEM)	FL WATER STREET PARKING STRU (FL WTR ST)
CHILD DEVELOPMENT CENTER (CDC)	FLAGSTAR SAVINGS BANK BUILDING
CHRYSLER CNTR CONT ENGINEER ED (CHRYSLER)	FLEMING ADMINISTRATION BLDG (FLEMING)
CHURCH ST PARKING STRUCTURE	FLETCHER HALL (FLETCHER)
CHURCH ST PARKING STRUCTURE (CHURCH PK)	FLETCHER ST PARKING STRUCTURE (FLETCHER)
CLEMENTS WILLIAM L LIBRARY (CLEMENTS)	FLINT CENTRAL ENERGY PLANT (F ENRGY)
CLINICAL FACULTY OFFICE BLDG	FLINT DAVID M FRENCH HALL
COLISEUM (COLISEUM)	FLINT DAVID M FRENCH HALL (FLT FRENCH)
COLLEGE OF ARTS SCIENCE LETTER (CASL)	FLINT HARDING MOTT UNIV CENTER (F MOTT CTR)
COLLEGE OF PHARMACY BUILDING	FLINT HARRISON PARKING RAMP (F HARS PRK)
COLLEGE OF PHARMACY BUILDING (PHARMACY)	FLINT MOTT MEMORIAL (F MOTT MEM)
COMMUNITY DENTISTRY (COMM DENT)	FLINT PLANT SERVICES BUILDIN (F PLANT SV)
COMMUNITY FAMILY HEALTH CENTER	FLINT RECREATION BUILDING (F REC BLD)
COMMUNITY FAMILY HEALTH CENTER (COMM FAMHC)	FLINT ROSS HOUSE (F ROSS)
COMPUTER INFORMATION SCIENCE (CIS)	FLINT THOMPSON FRANCES W LIBRA (F LIBRARY)
COMPUTER SCIENCE ENGINEERING (COMP SCI)	FLINT TV TRANSMITTER BLDG (F TV TRANS)
COMPUTEREXECUTIVE EDUCATION B (COMP EX E)	FLINT UNIVERSITY PAVILION (F PAVILION)
COMPUTING CENTER ANNEX (ITD ANNEX)	FLINT WILLIAM S WHITE BUILDING
COOK JOHN P BUILDING (COOK LAW)	FLINT WILLIAM S WHITE BUILDING (FL WHITE)
COOK MARTHA BUILDING (M COOK)	FLINT WM R MURCHIE SCIENCE BLD (F SCI BLD)
COOK WM W LEGAL RESEARCH LIB (LAW LIB)	FORD GERALD R LIBRARY (FORD LIB)
COOLEY MORTIMER E BUILDING	FORD NUCLEAR REACTOR (REACTOR)
COOLEY MORTIMER E MEMORIAL (COOLEY)	FOREST AVE PARKING STRUCTURE (FOREST PKG)
COUZENS HALL (COUZENS)	FRANCIS THOMAS JR PUBLIC HEALT (SPH2)
CRISLER ARENA (CRISLER)	FRANCIS THOMAS JR PUBLIC HEALTH
CUMMINS BUILDING	FRESH AIR CAMP #19 DIR COTTAGE (FA 19DIR)
DANA SAMUEL TRASK BUILDING	FRESH AIR CAMP #21 ACTIVITY BL (FA 21ACT 1)
DANA SAMUEL TRASK BUILDING (DANA)	FRESH AIR CAMP #24 CRAFTS (FA 24CRFTS)
DANCE BUILDING (DANCE)	FRESH AIR CAMP #25 KITCHEN (FA 25KITCH)
DB COLLEGE OF ARTS SCIENCE & LETTERS BLDG	FRESH AIR CAMP #29 WATERFRONT (FA 29WTRFR)
DEARBORN ADMINISTRATION BLDG	FRESH AIR CAMP #33 CLINIC (FA 33CLINC)
DEARBORN COMMERCE PARK (DB COM PK)	FRESH AIR CAMP #34 ACTIVITY BL (FA 34ACT3)
DEARBORN COMPUTER AND INFORMATION SCIENCE	FRESH AIR CAMP #35 ACTIVITY BL (FA 35ACT4)
DEARBORN ENGINEERING LAB BLDG	FRESH AIR CAMP #37 FACULTY HSI (FA 37FCLTY)
DEARBORN FAIRLANE CENTER	FRESH AIR CAMP #38 FACULTY HSI (FA 38FCLTY)
DEARBORN UNIVERSITY CENTER	FRESH AIR CAMP #39 WOMENS CABI (FA 39WMN)
DENNISON DAVID M BUILDING	FRESH AIR CAMP #40 MENS CABIN (FA 40MEN)
DENNISON DAVID M BUILDING (DENNISON)	FRESH AIR CAMP #45 STORAGE (FA 45STRG)
DENTAL AND W K KELLOGG INSTITU (DENTAL)	FRESH AIR CAMP #46 STOR MAIN (FA 46STRG)
DENTAL AND W K KELLOGG INSTITUTE	FRESH AIR CAMP #47 MISC STORAG (FA 47MISC)
DETROIT OBSERVATORY (DET OBSERV)	FRESH AIR CAMP #63 DINING REC (FA 63DINE)
DEVELOPMENT MAJ GIFTS PASADENA (MAJ GIFTS)	FRESH AIR CAMP CABIN # 1 (FA CAB1)
DEXTER FAMILY PRACTICE (DEXTER FAM)	FRESH AIR CAMP CABIN # 2 (FA CAB2)
DOMINO FARMS (DOMINO)	FRESH AIR CAMP CABIN # 3 (FA CAB3)
DOW HERBERT H BUILDING	FRESH AIR CAMP CABIN # 4 (FA CAB4)
DOW HERBERT H BUILDING (DOW)	FRESH AIR CAMP CABIN # 5 (FA CAB5)
DUDERSTADT CENTER (DUDERSTADT)	FRESH AIR CAMP CABIN # 6 (FA CAB6)
DUDERSTADT JAMES AND ANNE CENTER	FRESH AIR CAMP CABIN # 7 (FA CAB7)
E ANN ARBOR HEALTH GERIATRIC (EAHHC)	FRESH AIR CAMP CABIN # 8 (FA CAB8)
EAST ANN ARBOR HEALTH AND GERIATRICS CENTER	FRESH AIR CAMP CABIN # 9 (FA CAB9)
EAST HALL	FRESH AIR CAMP CABIN #10 (FA CAB10)
EAST HALL (E HALL)	FRESH AIR CAMP CABIN #11 (FA CAB11)
EAST QUADRANGLE	FRESH AIR CAMP CABIN #12 (FA CAB12)
EAST QUADRANGLE (EAST QUAD)	FRESH AIR CAMP CABIN #13 (FA CAB13)
EDUCATION SCHOOL OF (EDUCATION)	FRESH AIR CAMP CABIN #14 (FA CAB14)
EISENHOWER COMMERCE CENTER - BLDG 2	FRESH AIR CAMP CABIN #32 (FA CAB32)
EISENHOWER COMMERCE CTR - BLD2 (EISENH CC2)	FRESH AIR CAMP HOUSING T11 (FA HSG T11)
EISENHOWER CORPORATE PARK WEST (ECPW)	FRESH AIR CAMP HOUSING T12 (FA HSG T12)
EISENHOWER CP (EISNHWR CP)	FRESH AIR CAMP HOUSING T8 (FA HSG T8)
ELBEL FIELD LOCKER BUILDING (ELBEL LKR)	FRESH AIR CAMP STORAGE BLDG (FA STRG BL)
ELECTRICAL ENG & COMPUTER SCI BLDG	FRIEZE HENRY S BUILDING
ELECTRICAL ENG COMPUTER SCI BL (EECS)	FUEL MIXING BUILDING (FMB)
ENGINEERING LAB BLDG (ELB)	FULBARI (FULBARI)
ENGINEERING PROGRAMS BUILDING (ENG PROG)	GALLERIA BUILDING
ENGINEERING RESEARCH BLDG 1 (ENG RES 1)	GALLERIA BUILDING (GALLERIA)
ENGINEERING RESEARCH BLDG 2 (ENG RES 2)	GAS PAD STORAGE BUILDING (GAS PAD ST)
ENGINEERING RESEARCH BUILDING 1	GATEWAY CLINIC (GATEWAY CL)
ENGINEERING RESEARCH BUILDING 2	GEORGE EDWIN S RES CARTKR GAR (GE CRTKRGR)

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ENGINEERING RESEARCH SUPPORT B (ENG RES SP)	GEORGE EDWIN S RES CARTKR HS (GE CRTKRHS)
ENVIRONMENTAL & WATER RES ENG BL	GEORGE EDWIN S RESERVE COTTAGE (GE COTTAGE)
ENVIRONMENTAL INTERPRETIVE CTR (EIC)	GEORGE EDWIN S RESERVE LAB (GE LAB)
ENVIRONMENTAL RESEARCH INSTITUTE OF MICHIGAN	GEORGE EDWIN S RESERVE SHED (GE SHED)
ENVIRONMENTAL WATER RES ENG (EWRE)	GEORGE EDWIN S RESERVE SHELTER
EQUIPMENT MAINTENANCE SHOP (EQUIP SHOP)	GEORGE EDWIN S RESERVE SHELTER (GE SHELTER)
EXTRA SPACE STORAGE (EXTRASPACE)	GEORGE EDWIN S RESERVE STABLE (GE STABLE)
FACILITIES SERVICES BUILDING A	GEORGE EDWIN S RESERVE WILTSE (GE WILTSE)
FACILITIES SERVICES BUILDING A (FAC SVC A)	GEORGE EDWIN S RESRV CAMBN LAB (GE CAMBNLB)
GEORGE EDWIN S RESRV FROG POND (GE FROGPND)	LITERATURE SCIENCE AND THE ARTS
GEORGE EDWIN S RESRV GARAGE 2 (GE GRG 2)	LITTLE CLARENCE COOK SCIENCE B (CC LITTLE)
GEORGE EDWIN S RESRV GARAGE AP (GE GRG AP)	LITTLE CLARENCE COOK SCIENCE BLD
GEORGE EDWIN S RESRV H N DALE (GE HN DALE)	LIVONIA HEALTH CENTER (LIVONIA HC)
GEORGE EDWIN S RESRV N GATE HS (GE NGATEHS)	LIVONIA SPECIALTY CARE (LSC)
GEORGE EDWIN S RESRV WORKSHOP (GE WKSHP)	LLOYD A C RAD THERAPY CTR (1331 E ANN)
GERSTACKER BUILDING (GERSTACKER)	LLOYD ALICE C HALL (A LLOYD)
GERSTACKER CARL A BUILDING	LLOYD ALICE CROCKER RADIATION THERAPY CENTER
GLEN AVE PARKING STRUCTURE (GLEN PK)	LORCH HALL
GOLF CLUBHOUSE (GC CLUBHSE)	LORCH HALL (LORCH)
GOLF COURSE CARETAKER GARAGE (GC CT GAR)	LSA ADMINISTRATION ANNEX (LSA ADMN)
GOLF COURSE CARETAKER HOUSE (GC CT HSE)	LURIE ANN AND ROBERT H BIOMEDICAL ENGINEERING BLD
GOLF COURSE CART SHED (GC SHED)	LURIE ANN AND ROBERT H TOWER (LURIE TWR)
GOLF COURSE GARAGE (GC GARAGE)	LURIE BIOMEDICAL ENG (LURIEBIOMD)
GOLF COURSE PRACTICE RANGE BLD (GC PRACT)	LURIE ROBERT H ENGINEERING CTR (LURIE)
GOLF COURSE SHOPS (GC SHOP)	MADISON BUILDING (MADISON)
GOVERNMENT RELATIONS - LANSING (GOVLT RELAT)	MARDIGIAN LIBRARY (ML)
GOVLT RELATIONS - WASHINGTON DC (GOVLTREL DC)	MARKLEY MARY B HALL (MARKLEY)
GROUNDS BUILDING (GB)	MASON HALL
H PRECHTER ENGINEERING COMPLEX (HPEC)	MASON HALL (MASON HALL)
HAMILTON SQUARE (HAMILTN SQ)	MASS MUTUAL TOWER (MASS MUT)
HANDICRAFT BUILDING	MATERNAL & CHILD HEALTH CARE CTR
HARTWIG MARIE D ADMIN BLDG (HARTWIG)	MATERNAL CHILD HEALTH CARE CTR (MCHC)
HATCHER H NORTH GRADUATE LIBRA (HATCHER N)	MATT BOT GNDS HOUSE (BG GNDS HS)
HATCHER H NORTH GRADUATE LIBRARY	MATTHAEI BOT GDNS ENVIRONMENT (BG ENVR)
HATCHER H SOUTH GRAD LIBRARY (HATCHER S)	MATTHAEI BOT GDNS EXHIB GRN HS (BG EXHI GH)
HATCHER HARLAN H SOUTH GRADUATE LIBRARY	MATTHAEI BOT GDNS GREENHOUSE 1 (BG GH 1)
HAVEN HALL	MATTHAEI BOT GDNS GREENHOUSE 2 (BG GH 2)
HAVEN HALL (HAVEN)	MATTHAEI BOT GDNS GREENHOUSE 4 (BG GH 4)
HEALTH MANAGEMENT RESEARCH (HLTH MGMT)	MATTHAEI BOT GDNS GREENHOUSE 5 (BG GH 5)
HEALTH SERVICE	MATTHAEI BOT GDNS GREENHOUSE3 (BG GH 3)
HEALTH SERVICE (HLTH SERV)	MATTHAEI BOT GDNS INSTR SHELTE (BG INST SH)
HENDERSON MARY B HOUSE (HENDERSON)	MATTHAEI BOT GDNS NORTH BARN 1 (BG BARN 1)
HENRY FORD ESTATE (HFE)	MATTHAEI BOT GDNS NORTH BARN 2 (BG BARN 2)
HILL AUDITORIUM (HILL)	MATTHAEI BOT GDNS REPTILE HSE (BG REP HSE)
HILL ST PARKING STRUCTURE (HILL PK)	MATTHAEI BOT GDNS RESEARCH-ADM (BG RES ADM)
HOLDEN JAMES & LYNELLE PERINATAL RESEARCH LAB	MATTHAEI BOT GDNS SCREENHOUSE (BG S HSE 2)
HOLDEN PERINATAL RESEARCH LAB (HOLDEN)	MATTHAEI BOT GDNS STORAGE BLDG (BG STG)
HOOVER ANNEX (HOOVER ANX)	MATTHAEI BOT GDNS SUPT RESIDEN (BG S RES)
HOOVER AVE HEATING PLANT (HVR HTG)	MATTHAEI BOT GDNS UTILITY-BOIL (BG UTL BLR)
HOWELL PEDIATRICS (HOWELL PED)	MCGRAW HILL OBSERV BLD 1.3 (MCG BD 1.3)
HURON BANK	MCGRAW HILL OBSERV BLD 2.4 (MCG BD 2.4)
HURON BANK (HURON BANK)	MCGRAW HILL OBSERV SERVICE BLD (MCG SERV)
HUTCHINS HALL	MCGRAW HILL OBSERV STORAGE BLD (MCG STG)
HUTCHINS HALL (HUTCHNS)	MCKINLEY TOWNE CENTRE I
INDOOR TRACK BUILDING (TRACK)	MCKINLEY TOWNE CENTRE II (MCKINLEY2)
INDUSTRIAL OPERATIONS ENGIN BL (IOE)	MED CENTER DEVELOPMENT (MED CT DEV)
INGLIS CARETAKERS RESIDENCE (INGLIS CTR)	MED CTR N ENTRANCE PARKING STR (MED NE PK)
INGLIS GREENHOUSE #2 (ING GH2)	MEDICAL CENTER DR PARKING STRU (MED CTR PK)
INGLIS GREENHOUSE AND GARAGE (ING GH&GAR)	MEDICAL PROFESSIONAL BUILDING
INGLIS HOUSE (INGLIS HSE)	MEDICAL PROFESSIONAL BUILDING (MPB)
INGLIS PEACOCK HOUSE (ING P HSE)	MEDICAL SCIENCE UNIT I
INGLIS ROOT CELLAR (ING RT CLR)	MEDICAL SCIENCE UNIT I (MED SCI 1)
INGLIS STORAGE BUILDING (ING STG)	MEDICAL SCIENCE UNIT II
INN STORAGE (INN STORAG)	MEDICAL SCIENCE UNIT II (MED SCI 2)
INST FOR ADVANCED VEHICLE SYS (IAVS)	MEDICAL SCIENCES RESEARCH BLD1 (MSRB1)
INSTITUTE FOR SOCIAL RESEARCH	MEDICAL SCIENCES RESEARCH BLD2 (MSRB2)
INSTITUTE FOR SOCIAL RESEARCH (ISR)	MEDICAL SCIENCES RESEARCH BLD3 (MSRB3)
INSTITUTE OF CONTINUING LEGAL (ICLE)	MEDICAL SCIENCES RESEARCH BLDG I

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INTRAMURAL SPORTS BUILDING (IM SPORTS)	MEDICAL SCIENCES RESEARCH BLDG III
IST GAS STORAGE BUILDING (IST STG)	MED-INN
IST SOUTH (IST SOUTH)	MED-INN (MED-INN)
JUNGE FAMILY CHAMPIONS CENTER (JUNGE CTR)	MFG SYSTEMS ENGIN LAB (DB MSEL)
KALAMAZOO VALLEY COMM COLLEGE (KAL VAL CC)	MICH MEMORIAL PHOENIX LABORATO (PHOENIX)
KEEN CLIFFORD P ARENA (VAR GYM)	MICHIGAN HOUSE
KELLOGG EYE CENTER - BRIGHTON (KEC-BRIGHT)	MICHIGAN INFO TECH CENTER (MI INFO TC)
KELLOGG EYE CENTER - MILFORD (KEC-MIL)	MICHIGAN LEAGUE (LEAGUE)
KELLOGG EYE CENTER - W BLOOM (KEC-WBLOOM)	MICHIGAN MEMORIAL PHOENIX PROJECT LABORATORY
KELLOGG EYE CENTER (KEC)	MICHIGAN SQUARE
KELLOGG W K EYE CENTER	MICHIGAN SQUARE (MICH SQ)
KELSEY MUSEUM (KELSEY MUS)	MICHIGAN STADIUM (STADIUM)
KINDERGARTEN MODULE (KM)	MICHIGAN UNION (UNION)
KMS FUSION BLDG	MITCHELL FIELD BUILDING (MITCHELL)
KMS FUSION BLDG (KMS FUS)	MOD NAVAL ARCH MARINE ENG (MOD NAME)
KRAUS EDWARD HENRY BUILDING	MOD SOCIETY OF AUTO ENG (MOD SAE)
KRAUS EDWARD HENRY BUILDING (KRAUS)	MODERN LANGUAGES BUILDING (MLB)
KRESGE ANIMAL FACILITY (KR ANIMAL)	MODULAR AOSS NEWCOMB TRACT FAC (MOD NEWCMB)
KRESGE BUSINESS ADMIN LIBRARY (KRESGE LIB)	MODULAR ATHLETICS MAINTENANCE (MOD ATHLET)
KRESGE HEARING RESEARCH	MODULAR TECH COMMUNICATIONS (MODTECCOM)
KRESGE HEARING RESEARCH (KHRI)	MOLECULAR & BEHAVIORAL NEUROSCIENCE INSTITUTE
KRESGE MEDICAL RESEARCH I	MOLECULAR BEHAVIORAL NEUROSCI (MBNI)
KRESGE MEDICAL RESEARCH I (KRES1)	MONTEITH PARKING STRUCTURE (MPS)
KRESGE MEDICAL RESEARCH II (KRES2)	MOORE EARL V BLDG
KRESGE MEDICAL RESEARCH III (KRES3)	MOORE EARL V BLDG (MUSIC)
LANE HALL (LANE)	MOSHER-JORDAN (MOJO)
LAUNDRY	MOTT C S CHILDRENS HOSPITALS
LAUNDRY (LAUNDRY)	MOTT C S CHILDRENS HOSPITALS (MOTT)
LAW SCHOOL ADMISSIONS (LAW ADMINS)	MUSEUM OF ART (MUS ART)
LAWYERS CLUB (LAW CLUB)	MUSEUMS ANNEX
LAY WALTER E AUTOMOTIVE LAB (AUTO LAB)	MUSEUMS ANNEX (MUS ANNEX)
LIBERTY CENTRE (LIBERTY CT)	N C GROUNDS STORAGE BUILDING # (NC STG1)
LIFE SCIENCES INSTITUTE BLDG (LIFE SCI)	NAVAL ARCH MARINE ENGINEERING (NAME)
LIPSEY STUDENT PUBLICATIONS BL (LIPSEY BLD)	NC FACILITIES SERVICES BLDG (NC FAC SVC)
LITERATURE SCIENCE AND THE ART (LS&A)	NC GROUNDS GARAGE 1 (NC GAR 1)
NC GROUNDS STORAGE # 2 (NC STG 2)	NORTHWOOD IV APTS 610 (NW4 610)
NC GROUNDS STORAGE # 3 (NC STG 3)	NORTHWOOD IV APTS 611 (NW4 611)
NC STORAGE BUILDING #4 (NC STG #4)	NORTHWOOD IV APTS 612 (NW4 612)
NEUROSCIENCE BUILDING	NORTHWOOD IV APTS 613 (NW4 613)
NEW CENTER ONE (NEW CENTER)	NORTHWOOD IV APTS 614 (NW4 614)
NEW HOPE BAPTIST CHURCH (NEWHOPECH)	NORTHWOOD IV APTS 615 (NW4 615)
NEWBERRY RESIDENCE (NEWBERRY)	NORTHWOOD IV APTS 616 (NW4 616)
NEWS SERVICE BUILDING (NEWS SVC)	NORTHWOOD IV APTS 617 (NW4 617)
NICHOLS ARBORETUM GAR WRKSH (ARB GARAGE)	NORTHWOOD IV APTS 618 (NW4 618)
NICHOLS ARBORETUM RESIDENCE (ARB RESID)	NORTHWOOD IV APTS 619 (NW4 619)
NICHOLS ARBORETUM STORAGE SHED (ARB SHED)	NORTHWOOD IV APTS 620 (NW4 620)
NORTH CAMPUS ADMIN COMPLEX (NCAC)	NORTHWOOD IV APTS 621 (NW4 621)
NORTH CAMPUS ADMINISTRATIVE COMPLEX	NORTHWOOD IV APTS 622 (NW4 622)
NORTH CAMPUS CHILLER PLANT (NC CHILLER)	NORTHWOOD IV APTS 623 (NW4 623)
NORTH CAMPUS GROUND SVC FACILI (NC GRND SV)	NORTHWOOD IV APTS 624 (NW4 624)
NORTH CAMPUS HOUSING SERVICE B (NC HSG MNT)	NORTHWOOD IV APTS 625 (NW4 625)
NORTH CAMPUS RECREATION BUILDI (NCRB)	NORTHWOOD IV APTS 626 (NW4 626)
NORTH CAMPUS SERVICE BLDG #1	NORTHWOOD IV APTS 627 (NW4 627)
NORTH CAMPUS SERVICE BLDG #1 (NC SERV 1)	NORTHWOOD IV APTS 628 (NW4 628)
NORTH CAMPUS STORAGE BUILDING (NC STG)	NORTHWOOD IV APTS 629 (NW4 629)
NORTH CAMPUS SWITCH STATION (NC SW STA)	NORTHWOOD IV APTS 630 (NW4 630)
NORTH EAST CORPORATE CENTER 1 (NECORP CT1)	NORTHWOOD IV APTS 631 (NW4 631)
NORTH EAST CORPORATE CENTER 2 (NECORP CT2)	NORTHWOOD IV APTS 632 (NW4 632)
NORTH HALL (NORTH HALL)	NORTHWOOD IV APTS 633 (NW4 633)
NORTH UNIVERSITY BUILDING	NORTHWOOD IV APTS 634 (NW4 634)
NORTHERN BREWERY (NORTHN BRW)	NORTHWOOD IV APTS 635 (NW4 635)
NORTHWOOD COMMUNITY CENTER (NWOOD CC)	NORTHWOOD IV APTS 636 (NW4 636)
NORTHWOOD I APTS 451 (NW1 AP 451)	NORTHWOOD IV APTS 637 (NW4 637)
NORTHWOOD I APTS 452 (NW1 AP 452)	NORTHWOOD IV APTS 638 (NW4 638)
NORTHWOOD I APTS 453 (NW1 AP 453)	NORTHWOOD IV APTS 639 (NW4 639)
NORTHWOOD I APTS 454 (NW1 AP 454)	NORTHWOOD IV APTS 640 (NW4 640)
NORTHWOOD I APTS 455 (NW1 AP 455)	NORTHWOOD IV APTS 641 (NW4 641)
NORTHWOOD I APTS 456 (NW1 AP 456)	NORTHWOOD IV APTS 642 (NW4 642)



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NORTHWOOD I SVC BUILDING 450 (NW1 SV 450)	NORTHWOOD IV APTS 643 (NW4 643)
NORTHWOOD II APTS 462 (NW2 AP 462)	NORTHWOOD IV APTS 644 (NW4 644)
NORTHWOOD II APTS 464 (NW2 AP 464)	NORTHWOOD IV APTS 645 (NW4 645)
NORTHWOOD II APTS 465 (NW2 AP 465)	NORTHWOOD IV APTS 646 (NW4 646)
NORTHWOOD II APTS 466 (NW2 AP 466)	NORTHWOOD IV APTS 647 (NW4 647)
NORTHWOOD II APTS 467 (NW2 AP 467)	NORTHWOOD IV APTS 648 (NW4 648)
NORTHWOOD II APTS 468 (NW2 AP 468)	NORTHWOOD IV APTS 649 (NW4 649)
NORTHWOOD II APTS 469 (NW2 AP 469)	NORTHWOOD IV APTS 650 (NW4 650)
NORTHWOOD II APTS 470 (NW2 AP 470)	NORTHWOOD IV APTS 651 (NW4 651)
NORTHWOOD II APTS 471 (NW2 AP 471)	NORTHWOOD IV APTS 652 (NW4 652)
NORTHWOOD II APTS 472 (NW2 AP 472)	NORTHWOOD IV APTS 653 (NW4 653)
NORTHWOOD II APTS 473 (NW2 AP 473)	NORTHWOOD IV APTS 654 (NW4 654)
NORTHWOOD II APTS 474 (NW2 AP 474)	NORTHWOOD IV APTS 655 (NW4 655)
NORTHWOOD II APTS 475 (NW2 AP 475)	NORTHWOOD IV APTS 656 (NW4 656)
NORTHWOOD II APTS 476 (NW2 AP 476)	NORTHWOOD IV APTS 657 (NW4 657)
NORTHWOOD II APTS 477 (NW2 AP 477)	NORTHWOOD IV APTS 658 (NW4 658)
NORTHWOOD II APTS 478 (NW2 AP 478)	NORTHWOOD IV APTS 659 (NW4 659)
NORTHWOOD II APTS 479 (NW2 AP 479)	NORTHWOOD IV APTS 660 (NW4 660)
NORTHWOOD II APTS 480 (NW2 AP 480)	NORTHWOOD IV APTS 661 (NW4 661)
NORTHWOOD II APTS 481 (NW2 AP 481)	NORTHWOOD IV APTS 662 (NW4 662)
NORTHWOOD II APTS 482 (NW2 AP 482)	NORTHWOOD IV APTS 663 (NW4 663)
NORTHWOOD II APTS 483 (NW2 AP 483)	NORTHWOOD IV APTS 664 (NW4 664)
NORTHWOOD II APTS 484 (NW2 AP 484)	NORTHWOOD IV APTS 665 (NW4 665)
NORTHWOOD II APTS 485 (NW2 AP 485)	NORTHWOOD IV APTS 666 (NW4 666)
NORTHWOOD II APTS 486 (NW2 AP 486)	NORTHWOOD IV APTS 667 (NW4 667)
NORTHWOOD II APTS 487 (NW2 AP 487)	NORTHWOOD IV APTS 668 (NW4 668)
NORTHWOOD II APTS 488 (NW2 AP 488)	NORTHWOOD IV APTS 669 (NW4 669)
NORTHWOOD II APTS 489 (NW2 AP 489)	NORTHWOOD IV APTS 670 (NW4 670)
NORTHWOOD II APTS 490 (NW2 AP 490)	NORTHWOOD IV APTS 671 (NW4 671)
NORTHWOOD II APTS 491 (NW2 AP 491)	NORTHWOOD IV APTS 672 (NW4 672)
NORTHWOOD II APTS 492 (NW2 AP 492)	NORTHWOOD IV APTS 673 (NW4 673)
NORTHWOOD II APTS 493 (NW2 AP 493)	NORTHWOOD IV APTS 674 (NW4 674)
NORTHWOOD II APTS 494 (NW2 AP 494)	NORTHWOOD IV APTS 675 (NW4 675)
NORTHWOOD II APTS 495 (NW2 AP 495)	NORTHWOOD IV APTS 676 (NW4 676)
NORTHWOOD II APTS 496 (NW2 AP 496)	NORTHWOOD IV APTS 677 (NW4 677)
NORTHWOOD II APTS 497 (NW2 AP 497)	NORTHWOOD IV APTS 678 (NW4 678)
NORTHWOOD II SVC BUILDING 457 (NW2 SV 457)	NORTHWOOD IV APTS 679 (NW4 679)
NORTHWOOD II SVC BUILDING 458 (NW2 SV 458)	NORTHWOOD IV APTS 680 (NW4 680)
NORTHWOOD II SVC BUILDING 459 (NW2 SV 459)	NORTHWOOD IV APTS 681 (NW4 681)
NORTHWOOD II SVC BUILDING 460 (NW2 SV 460)	NORTHWOOD IV APTS 682 (NW4 682)
NORTHWOOD II SVC BUILDING 461 (NW2 SV 461)	NORTHWOOD IV APTS 683 (NW4 683)
NORTHWOOD III APTS 501 (NW3 AP 501)	NORTHWOOD IV APTS 684 (NW4 684)
NORTHWOOD III APTS 502 (NW3 AP 502)	NORTHWOOD V APTS 2701 (NWV2701)
NORTHWOOD III APTS 503 (NW3 AP 503)	NORTHWOOD V APTS 2702 (NWV2702)
NORTHWOOD III APTS 504 (NW3 AP 504)	NORTHWOOD V APTS 2703 (NWV2703)
NORTHWOOD III APTS 505 (NW3 AP 505)	NORTHWOOD V APTS 2704 (NWV2704)
NORTHWOOD III APTS 506 (NW3 AP 506)	NORTHWOOD V APTS 2705 (NWV2705)
NORTHWOOD III APTS 507 (NW3 AP 507)	NORTHWOOD V APTS 2706 (NWV2706)
NORTHWOOD III APTS 508 (NW3 AP 508)	NORTHWOOD V APTS 2707 (NWV2707)
NORTHWOOD III SVC BUILDING 498 (NW3 SV 498)	NORTHWOOD V APTS 2708 (NWV2708)
NORTHWOOD III SVC BUILDING 499 (NW3 SV 499)	NORTHWOOD V APTS 2709 (NWV2709)
NORTHWOOD III SVC BUILDING 500 (NW3 SV 500)	NORTHWOOD V APTS 2710 (NWV2710)
NORTHWOOD IV APTS 601 (NW4 601)	NORTHWOOD V APTS 2711 (NWV2711)
NORTHWOOD IV APTS 602 (NW4 602)	NORTHWOOD V APTS 2712 (NWV2712)
NORTHWOOD IV APTS 603 (NW4 603)	NORTHWOOD V APTS 2713 (NWV2713)
NORTHWOOD IV APTS 604 (NW4 604)	NORTHWOOD V APTS 2714 (NWV2714)
NORTHWOOD IV APTS 605 (NW4 605)	NORTHWOOD V APTS 2715 (NWV2715)
NORTHWOOD IV APTS 606 (NW4 606)	NORTHWOOD V APTS 2716 (NWV2716)
NORTHWOOD IV APTS 607 (NW4 607)	NORTHWOOD V APTS 2717 (NWV2717)
NORTHWOOD IV APTS 608 (NW4 608)	NORTHWOOD V APTS 2718 (NWV2718)
NORTHWOOD IV APTS 609 (NW4 609)	NORTHWOOD V APTS 2719 (NWV2719)
NORTHWOOD V APTS 2720 (NWV2720)	PLYMOUTH PARK (PLYMTH PK)
NORTHWOOD V APTS 2721 (NWV2721)	PORTAGE LK OBSERV 24 IN O T BU (PLK 24)
NORTHWOOD V APTS 2722 (NWV2722)	PORTAGE LK OBSERV 28 FT R T BU (PLK 28)
NORTHWOOD V APTS 2723 (NWV2723)	PORTAGE LK OBSERV 85 FT R T BU (PLK 85)
NORTHWOOD V APTS 2724 (NWV2724)	PORTAGE LK OBSERV RECEIVER BUI (PLK REC V)
NORTHWOOD V APTS 2725 (NWV2725)	PORTAGE LK OBSERV STORAGE WO (PLK WKS)
NORTHWOOD V APTS 2726 (NWV2726)	PORTAGE LK TOOL STG TRAILR (PLK STRG)

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NORTHWOOD V APTS 2727 (NWW2727)	POUND MADELON HOUSE (POUND HSE)
NORTHWOOD V APTS 2728 (NWW2728)	POUND MADELON HOUSE GARAGE (POUND GAR)
NORTHWOOD V APTS 2729 (NWW2729)	POWER CENTER FOR PERFORMING AR (POWER CTR)
NORTHWOOD V APTS 2730 (NWW2730)	PRESIDENTS RESIDENCE (PRES R)
NORTHWOOD V APTS 2731 (NWW2731)	PROFESSIONAL EDUCATION CENTER (PEC)
NORTHWOOD V APTS 2732 (NWW2732)	RACHEL UPJOHN BUILDING (R UPJOHN)
NORTHWOOD V APTS 2733 (NWW2733)	RACKHAM EDUCATIONAL MEMORIAL (RACKHAM ED)
NORTHWOOD V APTS 2734 (NWW2734)	RACKHAM HORACE H GRAD STUDIES
NORTHWOOD V APTS 2735 (NWW2735)	RACKHAM HORACE H GRAD STUDIES (RACKHAM)
NORTHWOOD V APTS 2736 (NWW2736)	RADIATION SCIENCES LAB 1 (RAD SCI 1)
NORTHWOOD V APTS 2737 (NWW2737)	RADIATION SCIENCES LAB 2 (RAD SCI 2)
NORTHWOOD V APTS 2738 (NWW2738)	RADIATION SCIENCES LABORATORY 2
NORTHWOOD V APTS 2739 (NWW2739)	RADIATION SCIENCES LABORATORY 1
NORTHWOOD V APTS 2740 (NWW2740)	RADIO BROADCASTING STATION (RADIO STA)
NORTHWOOD V APTS 2741 (NWW2741)	RADRICK FARMS BARN #1 (RF BARN 1)
NORTHWOOD V APTS 2742 (NWW2742)	RADRICK FARMS CARETAKERS HOUSE (RF CT HSE)
NORTHWOOD V APTS 2743 (NWW2743)	RADRICK FARMS CHICKEN HOUSE (RF CHK HSE)
NORTHWOOD V APTS 2744 (NWW2744)	RADRICK FARMS CORNCRIB #1 (RF CRN CB1)
NORTHWOOD V APTS 2745 (NWW2745)	RADRICK FARMS CORNCRIB #2 (RF CRN CB2)
NORTHWOOD V APTS 2746 (NWW2746)	RADRICK FARMS DRIVE RANGE SHEL (RF DR SHLT)
NORTHWOOD V APTS 2747 (NWW2747)	RADRICK FARMS FIRE BARN (RF FR BRN)
NORTHWOOD V APTS 2748 (NWW2748)	RADRICK FARMS FOOD SERVICE BLD (RF FD SVC)
NORTHWOOD V APTS 2749 (NWW2749)	RADRICK FARMS GARAGE (RF GAR)
NORTHWOOD V APTS 2750 (NWW2750)	RADRICK FARMS GOLF CART BUILDI (RF GLF CRT)
NORTHWOOD V APTS 2751 (NWW2751)	RADRICK FARMS GOLF CLUBHOUSE (RF G C HSE)
NORTHWOOD V APTS 2752 (NWW2752)	RADRICK FARMS GOLF STORAGE BLD (RF GSTG)
NORTHWOOD V APTS 2753 (NWW2753)	RADRICK FARMS HOUSE #3 (RF HSE 3)
NORTHWOOD V APTS 2754 (NWW2754)	RADRICK FARMS MILK HOUSE (RF MLK HSE)
NORTHWOOD V APTS 2755 (NWW2755)	RADRICK FARMS POOL HOUSE (RF POOL HS)
NORTHWOOD V APTS 2756 (NWW2756)	RADRICK FARMS RECREATION FACIL (RF REC FAC)
NORTHWOOD V APTS 2757 (NWW2757)	RADRICK FARMS SHED-GARAGE (RF SHD&GAR)
NORTHWOOD V APTS 2758 (NWW2758)	RADRICK FARMS STORAGE (RF FR STOR)
NORTHWOOD V APTS 2759 (NWW2759)	RADRICK FARMS TACKROOM-BARN (RF TAK BRN)
NORTHWOOD V APTS 2760 (NWW2760)	RADRICK FARMS TOOL SHED (RF TL SHD)
NORTHWOOD V APTS 2761 (NWW2761)	RALEIGH OFFICECENTER
NORTHWOOD V APTS 2762 (NWW2762)	RANDALL HARRISON M LABORATORY
NORTHWOOD V APTS 2763 (NWW2763)	RANDALL HARRISON M LABORATORY (RANDALL)
NORTHWOOD V APTS 2764 (NWW2764)	RECREATION ORGANIZATION CTR (ROC)
NORTHWOOD V APTS 2765 (NWW2765)	REICHERT HEALTH BUILDING
NORTHWOOD V APTS 2766 (NWW2766)	REICHERT HEALTH BUILDING (REICHERT)
NORTHWOOD V APTS 2767 (NWW2767)	REVELLI WM D BAND REHEARSAL HA (REVELLI)
NORTHWOOD V APTS 2768 (NWW2768)	RONALD MCDONALD HSE (RON MCDON)
NORTHWOOD V APTS 2769 (NWW2769)	ROSS STEPHEN M ACADEMIC CTR (ROSS ACAD)
NORTHWOOD V APTS 2770 (NWW2770)	RUTHVEN ALEXANDER G MUSEUMS BL (MUSEUMS)
NORTHWOOD V APTS 2771 (NWW2771)	RUTHVEN ALEXANDER G MUSEUMS BLDG
NORTHWOOD V APTS 2772 (NWW2772)	SAGINAW FOREST GARAGE (SF GAR)
NORTHWOOD V APTS 2773 (NWW2773)	SAGINAW FOREST RESIDENCE (SF RESIDEN)
NORTHWOOD V APTS 2774 (NWW2774)	SALINE HEALTH CENTER (SALINE HC)
NORTHWOOD V APTS 2775 (NWW2775)	SALT STORAGE BUILDING (SALTSTG)
NORTHWOOD V APTS 2776 (NWW2776)	SANFORD
NORTHWOOD V APTS 2777 (NWW2777)	SB COMPUTING WING (CW)
NORTHWOOD V APTS 2778 (NWW2778)	SCHEMBECHLER GLENN E HALL (SCHEM HALL)
NORTHWOOD V APTS 2779 (NWW2779)	SCHOOL OF INFORMATION NORTH
OAKWOOD OFFICE CENTER	SCHOOL OF INFORMATION NORTH (SCH INFO N)
OBSERVATORY LODGE (OBSERV LG)	SCHOOL OF NURSING BUILDING
OH ADELIA CHEEVER RESIDENCE (OH CHEEVER)	SCHOOL OF NURSING BUILDING (NURSING)
OH GEDDES RESIDENCE (OH GEDDES)	SCHOOL OF SOCIAL WORK BUILDING (SOC WORK)
OH GODDARD HALL (OH GODDARD)	SCIENCE BUILDING (SB)
OH JULIA E EMANUEL RESIDENCE (OH EMANUEL)	SCIENCE LEARNING RESEARCH CTR (SLRC)
OH LAUREL H SEELEY HALL (OH SEELEY)	SEISMOGRAPH STATION (SEISMO STA)
OH PAMELA NOBLE RESIDENCE (OH NOBLE)	SHAPIRO HAROLD T AND VIVIAN B LIBRARY
OH PLANT SERVICE (OH SERVICE)	SHAPIRO HAROLD VIVIAN LIBRAR (UG LIB)
OH VANDENBERG HALL (OH VANDNBG)	SHEEP RESEARCH FAC EAST BARN (SR E BARN)
ONE NORTH MAIN (ONE N MAIN)	SHEEP RESEARCH FAC PORTAL VIST (SR PRT VIS)
OOSTERBAAN BENNIE FIELD HOUSE (OOST FLD)	SHEEP RESEARCH FAC SQUARE DOME (SR SQ DOME)
ORCHESTRA PLACE (ORCH PLACE)	SHEEP RESEARCH FACILITY HAY BA (SR HY BARN)
OSBORN C S PRES GANDER COTTAGE (OS GNDRCOT)	SHEEP RESEARCH FACILITY OLD BA (SR OLD BRN)
OSBORN C S PRES GO-DOWN LIBRAR (OS GO LIBR)	SHEEP RESEARCH FACILITY P BARN (SR BARN 1)

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OSBORN C S PRES LITTLE DUCK CA (OS LDUCKCB)	SHEPHERD WOMENS GYMNASI (SHEPHERD)
OSBORN C S PRES SHED #2 (OS SHED2)	SIMPSON CIRCLE PARKING STRUCTU (SIMPSON PK)
OSBORN C S PRES SHED #8 (OS SHED8)	SIMPSON THOMAS H MEMORIAL INST (SIMPSON)
OSBORN C S PRES SOUTH DWELLING (OS SODWELL)	SOCIAL SCIENCES BUILDING (SSB)
OSBORN C S PRES SOUTH GARAGE (OS SO GAR)	SOFTBALL SERVICE (SFTBLL SVC)
OSBORN C S PRES WEST DWELLING (OS WEDWELL)	SOUTH QUAD (SOUTH QUAD)
PALMER COMMONS (PALMER CMN)	SPACE RESEARCH LABORATORY
PALMER PARKING STRUCTURE (PALMER)	SPACE RESEARCH LABORATORY (SPACE RES)
PARK GREEN ATRIUM BLDG (PARK GREEN)	STAMPS AUDITORIUM (STAMPS)
PARKVIEW MEDICAL CENTER (PARKVIEW)	STATE STREET STORAGE (STATE STOR)
PERRY BUILDING	STEARNS FREDERICK BUILDING (STEARNS)
PERRY BUILDING (PERRY)	STINCHFIELD WOODS MEETING BLDG (SW MEET)
PHYSICAL PROPERTIES BUILDING (PHYS PROP)	STINCHFIELD WOODS RESIDENCE (SW RES)
PIERPONT COMMONS (PIERPONT)	STINCHFIELD WOODS STORAGE BLD (SW STRG 1)
PLANT SERVICE BUILDING (PLANT SERV)	STINCHFIELD WOODS STORAGE BLD (SW STRG 2)
PLANT STORAGE BUILDING #1 (PLT STR 1)	STOCKWELL HALL (STOCKWELL)
PLANT STORAGE BUILDING #2 (PLT STR 2)	STOP N LOCK (STOPNLOCK)
PLANT STORAGE BUILDING #3 (PLT STR 3)	STUDENT ACTIVITIES
PLYMOUTH PARK	STUDENT ACTIVITIES (SAB)
SURVIVAL FLIGHT ANN ARBOR AIRP (SURV FLT)	
TAPPAN HALL	
TAPPAN HALL (TAPPAN)	
TAUBMAN A ALFRED HEALTH CARE C (TAUB CTR)	
TAUBMAN A ALFRED HEALTH CARE CTR	
TAUBMAN A ALFRED MEDICAL LIBRA (TAUB LIB)	
TAUBMAN A ALFRED MEDICAL LIBRARY	
TECUMSEH MED	
TELCOM MICROWAVE BLDG (TEL MICRO)	
TELECOMMUNICATIONS BLDG I (TELECOM 1)	
Test	
Test	
THAYER ST PARKING STRUCTURE (THAYER PK)	
THOMPSON ST PARKING STRUCTURE (THOMPSON)	
TISCH PRESTON ROBERT TENNIS BL (TENNIS)	
TOWN CENTER (TOWN CTR)	
TOWSLEY CENTER FOR CHILDREN (TOWSLY)	
TOWSLEY CENTER FOR CONT MED ED (TOWSLEY)	
TRANSPORTATION SERVICES BUILDI (TRANSP SRV)	
TRAVERWOOD (TRAVERWOOD)	
TRAVERWOOD II (TRAVERWD 2)	
TRAVERWOOD III (TRAVERWD 3)	
TRAVERWOOD IV (TRAVERWD 4)	
TROTTER WM MONROE HOUSE (TROTTER)	
TURNER GERIATRIC SERVICES (TURNER)	
TURNER MODULAR 1 (CT TURNER)	
TURNER MODULAR 2 (TURNMOD2)	
UM TRANS RES FLAMMABLE STOR BL (TRANS STOR)	
U-M TRANSPORTATION RESEARCH IN (UMTRI)	
U-M TRANSPORTATION RESEARCH INST	
UMH HELIPAD (HELIPAD)	
UMH MODULAR OFFICE A (UMH MOD A)	
UNDERGRADUATE SCIENCE BUILDING (UGSB)	
UNIV HOSPITALS CHILD CARE CENT (UH CCC)	
UNIVERSITY CENTER (UC)	
UNIVERSITY HOSPITALS	
UNIVERSITY HOSPITALS (U HOSP)	
UNIVERSITY STORES (U STORES)	
UNIVERSITY TOWERS (UNIV TOWER)	
UPJOHN CTR CLINICAL PHARMACO (UPJOHN)	
UPJOHN CTR CLINICAL PHARMACOLOGY	
UPJOHN RACHEL BUILDING	
VARSITY DRIVE BUILDING (VARSITY DR)	
VAUGHAN HENRY F PUBLIC HEALTH (SPH1)	
VAUGHAN HENRY FRIEZE PUBLIC HEALTH BUILDING	
VAUGHAN VICTOR C HOUSE	
VAUGHAN VICTOR C HOUSE (V VAUGHN)	
WALGREEN DRAMA CENTER (WALGREEN)	
WALLACE MIKE AND MARY HOUSE (WALLACE)	

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WATERS BUILDING (WATERS BLD)	
WEIDENBACH JOHN P HALL	
WEIDENBACH JOHN P HALL (WEIDENBACH)	
WEILL HALL (WEILL HALL)	
WEST ANN ARBOR HEALTH CENTER (WEST AA HC)	
WEST HALL	
WEST HALL (W HALL)	
WEST QUADRANGLE (WEST QUAD)	
WILLOW RUN AUTO MAINTENANCE SH (WR AUTOMTN)	
WILLOW RUN BACHELOR QRTRS #15 (WR BQ 15)	
WILLOW RUN BACHELOR QRTRS #16 (WR BQ 16)	
WILLOW RUN BACHELOR QRTRS #17 (WR BQ 17)	
WILLOW RUN BACHELOR QRTRS #18 (WR BQ 18)	
WILLOW RUN BACHELOR QRTRS #30 (WR BQ 30)	
WILLOW RUN BACHELOR QRTRS #31 (WR BQ 31)	
WILLOW RUN BACHELOR QRTRS #32 (WR BQ 32)	
WILLOW RUN BACHELOR QRTRS #33 (WR BQ 33)	
WILLOW RUN DINING HALL-AIRMEN (WR DNG AIR)	
WILLOW RUN HEATING FACILITY (WR HEATFAC)	
WILLOW RUN MAINTENANCE SHOP (WR MNTN)	
WILLOW RUN MESS NCO CLUB (WR MESSCLB)	
WILLOW RUN OFFICER QRTRS #27 (WR OQ 27)	
WILLOW RUN OFFICER QRTRS #28 (WR OQ 28)	
WILLOW RUN OPERATIONS (WR OPER)	
WILLOW RUN POST EXCHANGE (WR POSTEX)	
WILLOW RUN POWERHOUSE (WR PWRHSE)	
WILLOW RUN RADIO TRANSMITTER (WR TRNSMTR)	
WILLOW RUN RECREATION BUILDING (WR RECBLD)	
WILLOW RUN SUPPLY #8 (WR SUPPLY8)	
WILLOW RUN SUPPLY #9 (WR SUPPLY9)	
WOLVERINE TOWER	
WOLVERINE TOWER (WOTO)	
WOMENS HOSPITALS	
WOMENS OFFICE BUIILDING (WOMENS)	
WURTSMITH AIRFORCE BASE	
WVGR TRANSMITTER BUILDING (WVGR TRANS)	
WYLY HALL (WYLY)	
YOST ICE ARENA (YOST)	
YPSILANTI HEALTH CENTER (YPSI HC)	

## Working with Documents

This procedure details how to:

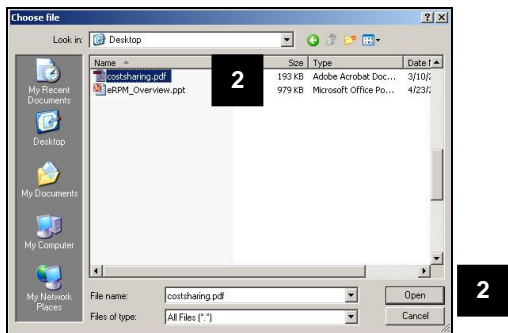
- **Attach:** Browse and attach documents right from the PAF Worksheet.
- **Upload New Version:** Upload a new version of a document and keep a version history (keeps previous documents).
- **View Version History:** View past versions of documents and revert to previous versions if needed.
- **Delete:** Remove a document. Does not keep any version history.
- **Manage Document Security:** Restrict specified personnel from viewing the document.

### Important Information

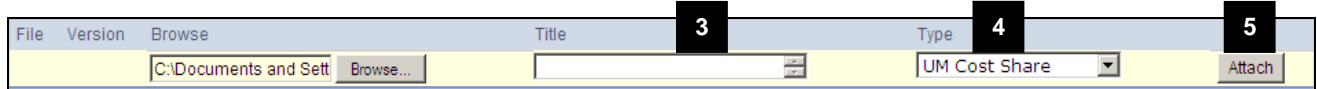
- No limit on the number of documents that can be attached.
- Each document cannot be larger than 150MB.
- Documents can be any file type (e.g., .ppt, .xls, .pdf, .doc).
  - The person viewing the document must have the correct program to view your attachments. For example, if someone does not have Microsoft Project he/she cannot view MS Project files (.mpp).
  - Consider uploading a lower version of file types to ensure everyone can view your document, e.g., upload .doc instead of .docx.
- Mac users: make sure you turn on file extensions. Any file uploaded without an extension (e.g., doc) cannot be viewed by others.

## ATTACH DOCUMENT

Use to browse and upload/attach documents within the PAF Worksheet.



1. Click **Browse** to locate the document on your computer.
2. Select the file to upload and click **Open**.



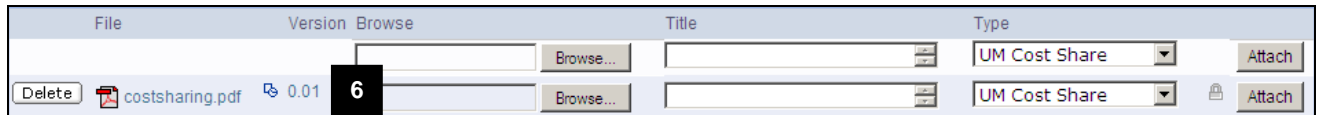
3. Optional, enter a title for the document.

4. Select or verify the document **Type**.

**Note:** Only when uploading Internal Documents will you have a choice of different document types. Otherwise Type matches the section you are completing. E.g., UM Cost Sharing is associated with documents attached in the UM Cost Sharing Section

5. Click **Attach**.

**Important!** Your document is not uploaded/attached unless you click attach.



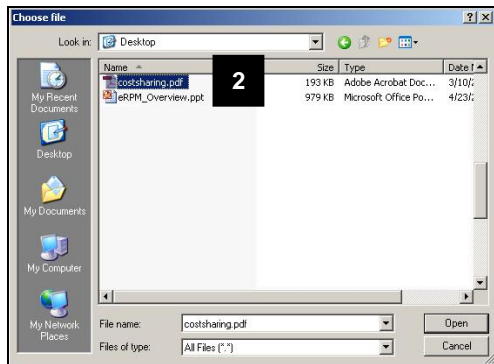
6. Your document is attached and appears as Version **0.01**.

**Note:** You can change the document title at any time, i.e., before or after you attach the document.

### UPLOAD NEW VERSION OF A DOCUMENT

Use to:

- Replace a document with a new version and keep a version history (keeps older versions for later reference)
- Modify document properties (e.g., title)



1. Click **Browse** to locate the new version the document that has already been attached/uploaded.

**Tip:** Make sure you are on the line for the current document and not the blank line to attach a new document.

2. Select the file to upload and click **Open**.



File	Version	Browse	Title	Type
<input type="button" value="Delete"/>	costsharing.pdf	<input type="text" value="0.01"/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>
		<input type="button" value="Browse..."/>	<input type="text" value="3"/>	UM Cost Share <input type="button" value="Attach"/>

3. Optional, change the title or enter a title for the document.

4. Verify the document **Type**.

**Note:** Only when uploading Internal Documents will you have a choice of different document types. Otherwise Type matches the section you are completing. E.g., UM Cost Sharing is associated with documents attached in the UM Cost Sharing Section.

5. Click **Attach**.

File	Version	Browse	Title	Type
<input type="button" value="Delete"/>	costsharing.pdf	<input type="text" value="0.02"/>	<input type="text"/>	UM Cost Share <input type="button" value="Attach"/>
		<input type="button" value="Browse..."/>	<input type="text" value="6"/>	UM Cost Share <input type="button" value="Attach"/>

7. Verify the version number change.

A version number increase signifies that you have attached a new version of the document. (e.g., change from version 0.01 to 0.02)

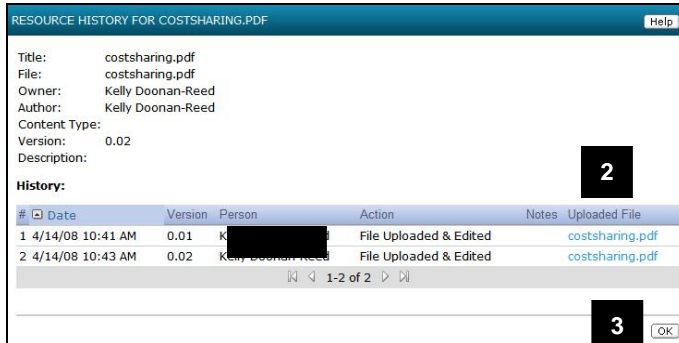
**Note:** If you only need to change a document property (Title, Type), you can make the change in the appropriate field. The change will be saved when you **Save** the page or click **Continue** to save and move to the next page.

## VIEW DOCUMENT VERSION HISTORY

Use to view past versions of edited documents and revert to previous versions if needed.



1. Click version number (e.g., 0.02) or **View Version History** button.



2. Click **Uploaded File** to view different versions of the file.

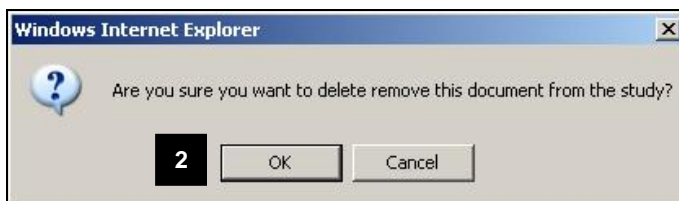
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- If you want to revert to an earlier version of a document:
  - Save the document
  - Upload the document (Follow the directions to Upload a New Version of a Document).

3. Click **OK** to return to the previous page.

## DELETE DOCUMENT

Use to delete a document. Does not keep any version history.

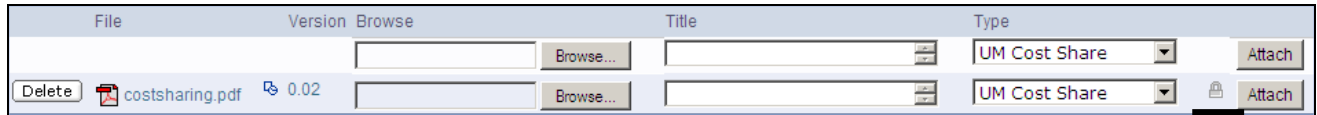


1. Click **Delete**.
2. Click **OK** to warning.
3. The document and all previous versions are permanently deleted.



**MANAGE DOCUMENT SECURITY**

Use to restrict specific personnel from viewing a document attached to a PAF. Any document that is restricted will not be visible to the restricted personnel. You cannot restrict access for UM or Sponsor Principal Investigators (PIs) or the Primary Research Administrator.



1. Click the padlock.

**Note:** When the padlock is grey, security has NOT been set on the document.



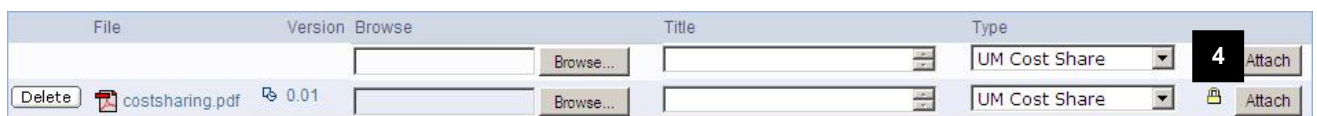
2. Click the box in front of any name to uncheck the box and restrict access to the document.

**Note:** The box will appear greyed out for some people because you cannot restrict document access for:

- UM Principal Investigators
- Sponsor Principal Investigators
- Primary Administrative Contact
- Primary Post-Award Contact
- Reviewers for the PAF

3. Click **Submit**.

4. Document security has been added and the padlock by the document is now gold .



## Topic 5: Grants.gov

Goal/outcome:

Discover how to complete a Grants.gov application using eRPM.

Objectives:

By the end of this module, you will be able to:

- Determine if Grants.gov forms are supported in eResearch
- Locate and use the Grants.gov forms in eRPM
- Copy info onto Grants.gov forms
- View Grants.gov workspace
- Identify the steps for validating, performing a submission pre-check and generating the PDF version of the application

<b>Materials</b>	<b>Page</b>
Grants.gov from eRPM (PowerPoint)	61
Grants.gov from eRPM (step by step procedure)	75

## Grants.gov eRPM Steps

1. PAF worksheet – Grants.gov submissions
  - Complete the Grants.gov specific questions
  - Determine if your FOA is supported (all required forms are supported)
  - Give Read & Edit Rights to Grant.gov forms
2. Copy PAF Info to Grants.gov form set.
3. Complete Grants.gov forms.
4. Validate (Required fields validation)
  - ! Must be done before can generate PDF!
5. Submission Pre-Check (Grants.gov validation)
6. Generate PDF Version.
7. Finalize Grants.gov forms for DRDA submission.

Last updated: 9/09/2009

1

### Step 1 - PAF worksheet – Grants.gov submissions

The screenshot shows the 'eResearchM Proposal Management' interface. The main content area is titled '1. General Information' and contains several sections:

- 1.1 Project Title**: A text input field containing 'Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. A 'HELP' button is to the right.
- 1.2 Long Title**: An empty text input field. A 'HELP' button is to the right.
- 1.3 Is this a Grants.gov funding opportunity?**: A radio button question with 'Yes', 'No', and 'Clear' options. A yellow callout box with a red arrow points to this question, containing the text 'Yes Grants.gov'. A 'HELP' button is to the right.
- 1.4 Is this a pre-proposal?**: A radio button question with 'Yes', 'No', and 'Clear' options. A 'HELP' button is to the right.

Navigation buttons include '<< Back', 'Save | Print', and 'Continue >>'.

2

## Step 1 - PAF worksheet – Grants.gov submissions

**eResearch Proposal Management** Edit PAF - 09-PAF00290

1. General Information  
Federal Grant Information

1.6 Download Grant Application Information  
Enter the Grants.gov Funding Opportunity Announcement number below. Information regarding the FOA will be downloaded from Grants.gov.

FOA number:  Find...

CFDA Number:

Competition ID:

**Look up FOA number to tie Grants.gov forms to PAF**

**HELP**

- Type the **FOA#** as specified by the sponsor, using upper and lower case letters, dashes, etc.  
If the FOA# unknown, search for it using Grants.gov.  
If you use the Grants.gov finder, you must return to eResearch Proposal Management to complete your application.  
Enter the **CFDA Number** and/or **Competition ID** to further refine your search.
- Click the **Find...** button.  
If this opportunity is found in the information downloaded each night from Grants.gov, it will appear as a line item below the form field.  
If you don't know any of these numbers, or you cannot find your proposal in the search, you can look this information up on the Grants.gov website.
- Select the opportunity by clicking on the radio button in front of it and click the **Continue** button to move to the next page of the form.  
You can also view or download instructions for the opportunity in .pdf format. Right-click or double click on the pdf icon next to the opportunity and select **Save Target As** to save it to your computer.

Additional Help

## Step 1 - PAF worksheet – Grants.gov submissions

**eResearch Proposal Management** Edit PAF - 09-PAF00290

1. General Information  
Federal Grant Information

1.6 Download Grant Application Information  
Enter the Grants.gov Funding Opportunity Announcement number below. Information regarding the FOA will be downloaded from Grants.gov.

FOA number: PAR-SS-R01 Find...

CFDA Number:

Competition ID: VERSION-2A

Opportunity Number	Opportunity Title	Opening Date	Closing Date	CFDA Number	Competition ID	Instructions
<input checked="" type="radio"/> PAR-SS-R01	R01 System-to-System PAR	8/3/2006	12/30/2010		VERSION-2A	

**Select Opportunity & continue.**

**HELP**

- Type the **FOA#** as specified by the sponsor, using upper and lower case letters, dashes, etc.  
If the FOA# unknown, search for it using Grants.gov.  
If you use the Grants.gov finder, you must return to eResearch Proposal Management to complete your application.  
Enter the **CFDA Number** and/or **Competition ID** to further refine your search.
- Click the **Find...** button.  
If this opportunity is found in the information downloaded each night from Grants.gov, it will appear as a line item below the form field.  
If you don't know any of these numbers, or you cannot find your proposal in the search, you can look this information up on the Grants.gov website.
- Select the opportunity by clicking on the radio button in front of it and click the **Continue** button to move to the next page of the form.  
You can also view or download instructions for the opportunity in .pdf format. Right-click or double click on the pdf icon next to the opportunity and select **Save Target As** to save it to your computer.

Additional Help



### Step 1 - PAF worksheet – Grants.gov submissions

**Check if forms supported**  
 Yes = Form Available in eRPM  
 No = Form Not Available in eRPM

Required Forms:	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:	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

**To submit to Grants.gov from eRPM, all required forms must be supported.**

### Step 1 - PAF worksheet – Grants.gov submissions

**Assign Grants.gov/SF424 Edit & Read rights to Key Personnel & Administrative Personnel.**

**Permissions**

PAF:  
 Edit

SF424:  
 Edit  Read

Save Cancel

## Step 2 – Copy PAF Info to Grants.gov Forms

The screenshot shows the 'Grants.gov Forms' menu for proposal 09-PAF00280. The menu includes options like 'Manage Documents', 'Related Projects', and 'Activities'. The 'Activities' section is expanded, showing 'Copy PAF Info to Grants.gov Forms' highlighted with a red box. A yellow callout box with an arrow points to this option, containing the text: 'Copy mapped PAF Info to Grants.gov Forms.'

## Step 2 – Copy PAF Info to Grants.gov Forms

Click OK to copy mapped PAF Info to Grants.gov Forms.

The dialog box is titled 'Copy PAF Info to Grants.gov Forms' and contains the following text:

**Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities(09-PAF00280)**

Use this activity to copy information from your PAF Worksheet to the Grants.gov Application (SF424 forms).

- Some information is mapped from the PAF Worksheet to the SF424 forms (e.g., Project Title).
- Some standard information is pre-populated for you (e.g., Regents of the University of Michigan).
- Learn more about [Grants.gov information mapped from PAF Worksheet](#) or the [pre-populated information](#).

**Warning!**

- Copy PAF Info to Grants.gov forms overwrites fields mapped from the PAF Worksheet to the Grants.gov forms.
- Only the fields mapped from the PAF Worksheet are updated/overwritten.
- The other information in the Grants.gov forms that is not mapped from the PAF Worksheet is not changed.

At the bottom right, there are 'OK' and 'Cancel' buttons. A red arrow points from the yellow callout box above to the 'OK' button.

## Step 2 – Copy PAF Info to Grants.gov Forms

The screenshot shows the 'eResearchM Proposal Management' interface. The main content area displays details for a proposal titled 'Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. A red arrow points from the 'Copy PAF Info to Grants.gov Forms' entry in the 'Recent Activity' table to the 'Recent Activity' section below.

Activity	Author	Activity Date
Copy PAF Info to Grants.gov Forms	R. Administrator	12/16/2008 9:12 AM EST

Who & when copied logged in Recent Activity

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

Activity	Author	Activity Date
Copy PAF Info to Grants.gov Forms	R. Administrator	12/16/2008 9:12 AM EST

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## Step 3 – Edit Grants.gov Forms

The screenshot shows the 'eResearchM Proposal Management' interface. The 'SF-424 Summary' section is expanded, showing a list of options. A red box highlights the link 'Grants.gov for 09-PAF00280'. A red arrow points from this link to the yellow callout box on the right.

Click on Grants.gov to access Grants.gov Workspace & Grants.gov forms.

### Step 3 – Edit Grants.gov Forms

The screenshot shows the eResearchM Proposal Management interface. At the top, a breadcrumb trail reads: "Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities". A yellow callout box points to this trail with the text "Breadcrumb allows you to return to PAF Workspace". Below the breadcrumb, the application status is "Pre-Submission" for "SF-4240000391 for 09-PAF00280". On the left sidebar, the "Edit Grant Application..." button is highlighted with a red box and a red arrow pointing to it. A yellow callout box below this button says "Edit Grants.gov Forms.". The main content area displays application details such as "Descriptive Title: Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities", "Submission Type: New", "Start Date: 3/3/2009", "End Date: 1/23/2011", "Tracking Number: PAR-SS-R01 (FOA00000231)", and "Status Updated: Received Date/Time:". At the bottom, a message states "The query produced no results."

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### Step 3 – Edit Grants.gov Forms

The screenshot shows the "Grants.gov Navigation" form selection screen. At the top, a yellow callout box points to the "Grants.gov Navigation" header with the text "Grants.gov Navigation". Below the header, there are navigation buttons: "<< Back", "Save | Exit | Hide/Show Errors | Print... | Jump To: Select Optional Forms", and "Continue >>". The main section is titled "Following forms are optional, Please select any that you wish to include in your application:". It lists several optional forms with checkboxes: "PHS 398 Cover Letter File V1.1", "PHS 398 Modular Budget V1.1", "R&R Subaward Budget Attachment Form V1.2", and "Research & Related Budget V1.1". A red box highlights the "Research & Related Budget V1.1" checkbox, which is checked. A yellow callout box points to this checkbox with the text "Select optional forms". Below this, a section titled "Following forms are required:" lists several required forms, including "PHS 398 Checklist V1.1", "PHS 398 Cover Page Supplement V1.1", "PHS 398 Research Plan V1.1", "Research & Related Project/Performance Site Locations V1.1", "Research & Related Senior/Key Person Expanded V1.1", "Research & Related Other Project Information V1.1", and "SF424 (R&R) V1.1". At the bottom, there are navigation buttons: "<< Back", "Save | Exit | Hide/Show Errors | Print... | Jump To: Select Optional Forms", and "Continue >>".

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### Step 3 – Edit Grants.gov Forms

**eResearchM Proposal Management** Edit: SF-424 - SF-4240000391

<< Back Save | Exit | Hide/Show Errors | Print... | Jump To: SF424 R&R Cover Page 1 (V1.1) Continue >>

**Fields Required Save Marked with Red Asterisk \***

**1. TYPE OF SUBMISSION** Application

**2. DATE SUBMITTED**

**4. Federal Identifier**

Applicant Identifier

**3. DATE RECEIVED BY STATE**

State Application Identifier

**5. APPLICANT INFORMATION** \*Organizational DUNS: 073133571

\*Legal Name: Regents of the University of Michigan

Department: Division:

\*Street 1: 3003 S. State St Street 2:

\*City: Ann Arbor County: Washtenaw State: MI: Michigan ZIP Code: 481091274

\*Country: USA: UNITED STATES Province:

Person to be contacted on matters involving this application

Prefix: \* First Name: Middle Name: Last Name: Suffix:

Ms. Therese G Maxwell

\* Phone Number: 734-764-7246 Fax Number: Email: tmax@umich.edu

**6. EMPLOYER IDENTIFICATION (EIN) or (TIN)** 38-606309

**7. TYPE OF APPLICANT:** [H: Public/State Controlled Institution of Higher Education] Other (Specify):

**8. TYPE OF APPLICATION** New

If Revision, make appropriate choice:

Small Business Organization Type  
 Women Owned  Socially and Economically Disadvantaged

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### Step 4 – Validate Submission

**eResearchM Proposal Management** R: Administrator | My Home | Clipboard | Projects | Logoff

Query Grant Finder All PAFs Site Administration

Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities > SF-4240000391 for 09-PAF00280 Layout

**Application Status**

Pre-Submission **SF-4240000391 for 09-PAF00280** SF-4240000391SF424

Edit Grant Application... Print Version

**Activities**

Validate Submission

Descriptive Title: Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities

Submission Type: New Start Date: 3/3/2009

PDF Version: Not Available, Please execute Generate PDF Version activity End Date: 1/23/2011

Tracking Number: FOA: PAR-SS-R01 ( FOA00000231 )

Status Updated: Received Date/Time:

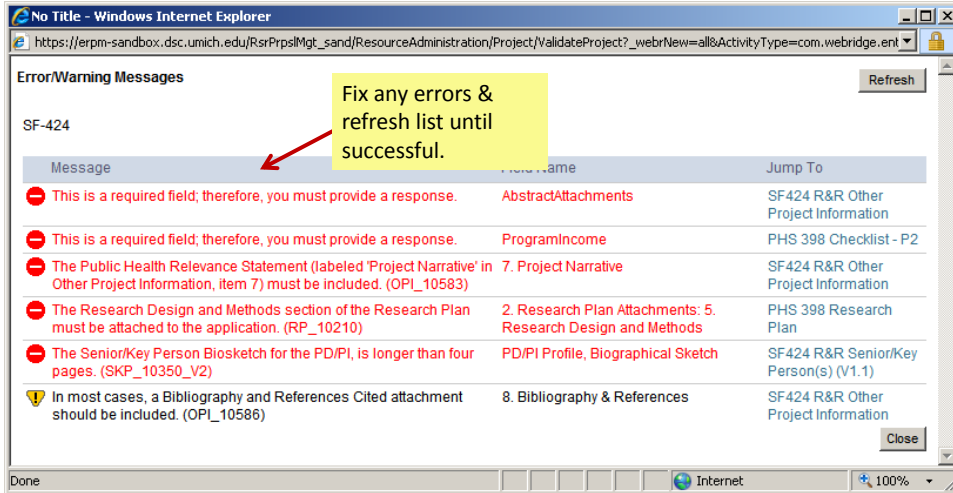
History Administration

The query produced no results.

Validate Submission checks that all fields required to save are completed.

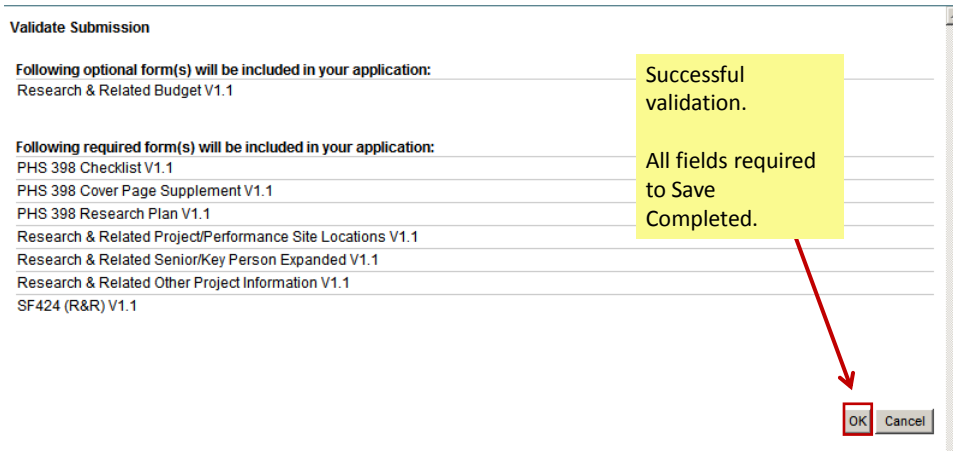
14

## Step 4 – Validate Submission



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## Step 4 – Validate Submission



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## Step 4 – Validate Submission

The screenshot shows the eResearchM Proposal Management interface. The application status is 'Valid for Submission' for SF-4240000391 for 09-PAF00280. The descriptive title is 'Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. The submission type is 'New', start date is 3/3/2009, end date is 1/23/2011, and tracking number is PAR-SS-R01 (FOA00000231). The status was updated on 1/31/2009 at 10:36 PM EST by R. Administrator. The history table shows a single entry: 'Submission validated' by R. Administrator on 1/31/2009 at 10:36 PM EST.

Annotations:

- Red arrow pointing to 'Valid for Submission' with text: **Status = Valid for Submission**
- Red arrow pointing to 'View Grant Application...' with text: **View only**
- Red arrow pointing to 'Reopen for Edit' with text: **Can reopen & edit, but must Validate again**
- Red arrow pointing to the 'Submission validated' entry in the history table with text: **Logged who & when activity completed**

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## Step 5 – Submission Pre-Check

The screenshot shows the eResearchM Proposal Management interface. The application status is 'Valid for Submission' for SF-4240000391 for 09-PAF00280. The descriptive title is 'Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities'. The submission type is 'New', start date is 3/3/2009, end date is 1/23/2011, and tracking number is PAR-SS-R01 (FOA00000231). The status was updated on 1/31/2009 at 10:36 PM EST by R. Administrator. The history table shows a single entry: 'Submission validated' by R. Administrator on 1/31/2009 at 10:36 PM EST.

Annotations:

- Red arrow pointing to 'Valid for Submission' with text: **Status Must Be Valid for Submission**
- Red arrow pointing to the 'Submission Pre-Check' button in the activities section with text: **Checks Grants.gov validation rules**

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## Step 5 – Submission Pre-Check - Errors

If errors are returned, re-open the forms for editing, make corrections, re-validate, and then run the “Submission Pre-Check” again.

**Submission Pre-Check**  
Grants.gov validation results

Generated Grants Xml File is NOT valid.

1. Cannot load schema for the namespace 'MetaGrantApplication' - The remote server returned an error: (502) Bad Gateway..
2. The 'MetaGrantApplication:GrantApplication' element is not declared.
3. The 'Header-V1.0:GrantSubmissionHeader' element is not declared.
4. Could not find schema information for the attribute 'Global-V1.0:schemaVersion'.
5. The 'Global-V1.0:HashValue' element is not declared.
6. Could not find schema information for the attribute 'Global-V1.0:hashAlgorithm'.
7. The 'Header-V1.0:AgencyName' element is not declared.

OK Cancel

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## Step 5 – Submission Pre-Check - Success

If the XML file is valid, double check your sponsor submission instructions to ensure that all sponsor requirements have been met.

E.g., some sponsors require that attached documents (PDFs) must be in a specific order.

**Submission Pre-Check**  
Grants.gov validation results

Generated Grants Xml File is valid.

OK Cancel

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## Step 6 – Generate PDF

**eResearchM Proposal Management**

Root > All PAFs > Human Elasticity > SF-4240000391 for 09-PAF00280

**Application Status**  
Valid for Submission

**Activities**  
Generate PDF Version

**Descriptive Title:** Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities

**Submission Type:** New

**PDF Version:** Not Available, Please execute Generate PDF Version activity

**Tracking Number:**

**Status Updated:**

Activity	Author	Activity Date
Submission validated	R. Administrator	1/31/2009 10:36 PM EST

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## Step 6 – Generate PDF

**Generate PDF Version**

**Click OK button to generate PDF version of your application.**

**The link to most recent generated PDF version is displayed on project workspace under label "PDF Version".**

**Include Attachments:**  (Note: PDF generation will take longer to finish)

Select the box to include attachments & click OK.

OK Cancel

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## Step 6 – Generate PDF

**eResearchM Proposal Management** R. Administrator | My Home | Clipboard | Projects | Logout

Query Grant Finder **All PAFs** Site Administration

Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities > SF-4240000391 for 09-PAF00280 Layout

**Application Status**  
Valid for Submission **SF-4240000391 for 09-PAF00280** SF-4240000391SF424

**Activities**  
View Grant Application...  
Print Version  
Generate PDF Version  
Reopen for Edit

**Descriptive Title:** Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities

**Submission Type:** New **Start Date:** 3/3/2009

**PDF Version:** [View] **End Date:** 1/23/2011

**Tracking Number:** **FOA:** PAR-SS-R01 (FOA00000231)

**Status Updated:** **Received Date/Time:**

Activity	Author	Activity Date
Generated PDF Version	R. Administrator	1/31/2009 10:59 PM EST
Latest PDF version is available on workspace summary		
Submission validated	R. Administrator	1/31/2009 10:36 PM EST

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## Step 6 – Generate PDF

**Submission Title:** SF-4240000391 for 09-PAF00259 - SF-4240000391

**Opportunity ID:** PAR-SS-R01

**Table of Contents**

SF-424 (R&R).....

Research & Related Senior/Key P.....

Research & Related Project/Perfor.....

Research & Related Other Project.....

Research & Related Budget.....

PHS 398 Checklist.....

PHS 398 Cover Page Supplement.....

PHS 398 Research Plan.....

**APPLICATION FOR FEDERAL ASSISTANCE SF 424 (R&R)**

2. DATE SUBMITTED

3. DATE RECEIVED BY STATE

1. \* TYPE OF SUBMISSION

Pre-application  Application

Changed/Corrected Application

4. Federal Identifier

5. APPLICANT INFORMATION

\* Legal Name: Regents of the University of Michigan

Department: Division:

\* Street1: 3003 S. State St Street2:

\* City: Ann Arbor County: Washtenaw

Province: \* Country: USA: UNITED STATE

Person to be contacted on matters involving this application

Prefix: \* First Name: Middle Name:

Ms. Therese G

\* Phone Number: 734-764-7246 Fax Number:

6. \* EMPLOYER IDENTIFICATION NUMBER (EIN) or (TIN): 38-6006309

7. \* TYPE H: Publ

8. \* TYPE OF APPLICATION:  New  Other (Sp)

## Step 6 – Generate PDF

Can access PDF from the PAF Workspace. No need to go to Grants.gov Workspace. Anyone with Grants.gov Read access can view the SF-424 PDF.

The screenshot shows the eResearchM Proposal Management interface. The left sidebar contains a 'Current State' menu with options: Proposal Preparation, PAF Summary, PAF Worksheet, SF-424 Summary, and Grants.Gov Forms. The main content area shows the 'SF-424 Summary' section with a 'Display SF-424 PDF' link. A red arrow points from the 'SF-424 Summary' link in the sidebar to the 'Display SF-424 PDF' link in the main content area.

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## Step 7 – Finalize Proposal for DRDA

Click Finalize Proposal for DRDA. Use to notify DRDA that proposal is final & ready for submission.

Grants.gov Application Status Must be Valid for Submission to finalize.

The screenshot shows the eResearchM Proposal Management interface. The left sidebar contains a 'Current State' menu with options: Unit Review, PAF Summary, PAF Worksheet, SF-424 Summary, and Grants.Gov Forms. The main content area shows the 'Manage Data' section with a 'Finalize for Submission to Sponsor' link. A red arrow points from the 'Finalize for Submission to Sponsor' link in the main content area to the 'Finalize Proposal for DRDA' link in the sidebar.

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## Step 7 – Finalize Proposal for DRDA

The screenshot shows the 'eResearchM Proposal Management' interface. The title bar indicates 'Edit PAF - 09-PAF00809'. The main content area is titled 'New horizons in nanospheres-revised title (09-PAF00809)'. Below the title, there is a section for indicating the readiness of the proposal for submission. A checkbox is present with the text: '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?)'. A yellow callout box with a red arrow pointing to the checkbox contains the text: 'Select the box to indicate that your proposal is finalized & ready for submission to Grants.gov. ! The Application Status must be Valid for Submission in order to successfully finalize. Click OK.'. At the bottom right of the form, there are 'OK', 'Cancel', and 'Apply' buttons. A red arrow points from the 'Click OK.' text in the callout box to the 'OK' button.

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## Grants.gov from eRPM

This procedure is a supplement to the rest of the materials about completing the PAF.

It covers the overall steps you need to complete when working with Grants.gov in eResearch:

Step	Additional Info	Page
1. PAF worksheet – Grants.gov submissions	<ul style="list-style-type: none"> <li>Complete the Grants.gov specific questions</li> <li>Determine if your FOA is supported (all required forms are supported – available in eRPM system)</li> </ul>	2
2. Copy PAF Info to Grants.gov form set.	<ul style="list-style-type: none"> <li>Steps to copy information mapped from PAF to Grants.gov forms.</li> </ul>	7
3. Complete Grants.gov forms.	<ul style="list-style-type: none"> <li>Explains the overall Grants.gov workspace.</li> <li>Navigation tips when working with Grants.gov forms.</li> </ul>	9
4. Assign Editors & Readers (Optional).	<ul style="list-style-type: none"> <li>Assign editors if you have Reviewers that need to edit the Grants.gov forms. (Must have access to the PAF).</li> <li>Assign readers if you have additional individuals who have access to the PAF who need the ability to read the Grants.gov forms (e.g., Ad Hoc Reviewers).</li> </ul>	12
5. Validate Grants.gov form set .	<ul style="list-style-type: none"> <li>Level 1 Validation – checks completed required fields</li> </ul>	13
6. Submission Pre-check (Strongly Recommended).	<ul style="list-style-type: none"> <li>Level 2 Validation – checks against Grants.gov validation rules (requirements of Grants.gov forms)</li> </ul>	16
7. Generate PDF Version (Optional).	<ul style="list-style-type: none"> <li>Steps to generate a PDF version of all information entered on Grants.gov forms with attached documents.</li> </ul>	17
8. Finalize Grants.gov forms for DRDA submission.	<ul style="list-style-type: none"> <li>Steps to inform DRDA that the proposal is finalized &amp; ready for submission.</li> </ul>	20

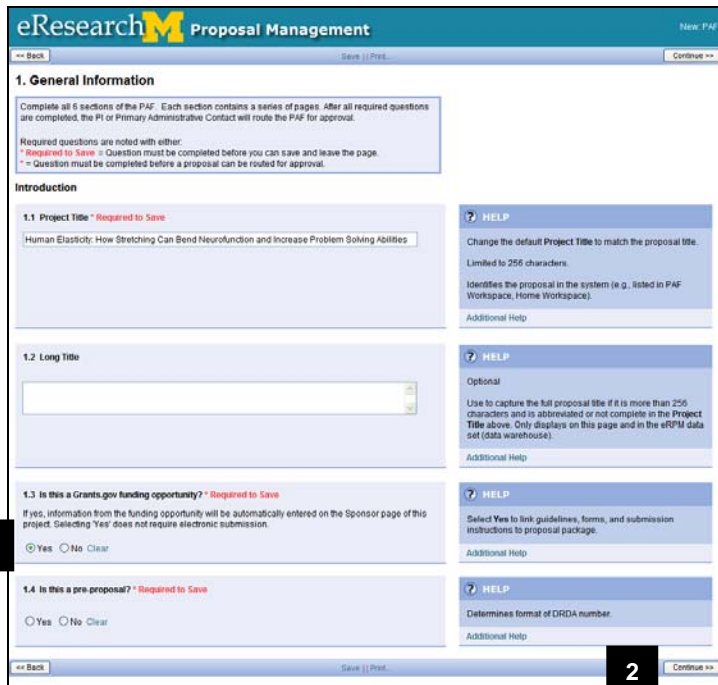
## 1. PAF WORKSHEET – Grants.gov Submissions

eRPM allows for direct system to system submission for supported Grants.gov opportunities (FOAs).

This section explains how to:

- Select that the proposal is a Grants.gov funding opportunity.
- Select the Grants.gov opportunity.
- Determine if the FOA forms are supported in eResearch.

### PAF Worksheet: General Information page



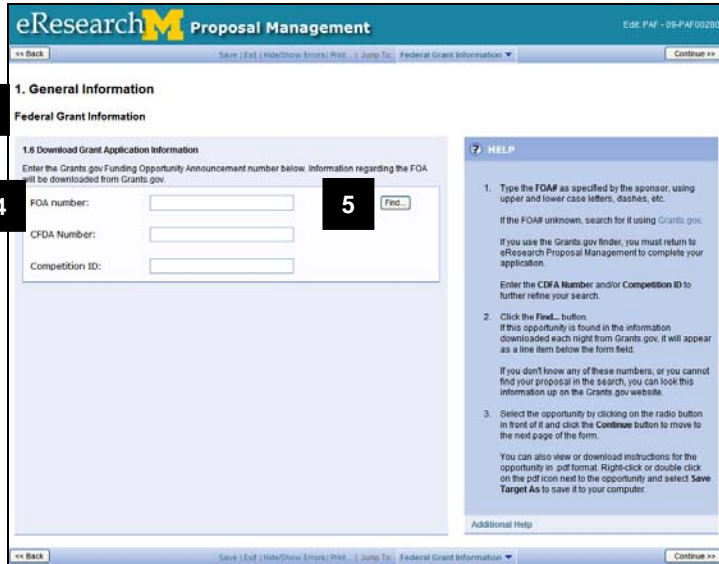
See the *Create PAF Basics step-by-step procedure* to learn more about the other fields on this page.

1. Click **Yes** (Is this a Grants.gov funding opportunity?).

#### Notes:

- You must answer question **1.3 Is this a Grants.gov Funding opportunity?** to save. It is marked with **\*Required to Save**. You will get an error if this is not completed.
  - Selecting yes to this question does not require electronic submission. You may still submit via paper.
  - If the Grants.gov forms for this opportunity are not yet supported by eResearch, you still have to submit using Adobe or PureEdge.
  - By answering yes, you will be directed to Grants.gov specific PAF questions.
2. Click **Continue** to save and move to the next page.

Federal Grant Information Page



- Notice that you are on the **Federal Grant Information** page because you selected that this is a Grants.gov opportunity. You will use this page to look up the opportunity.

**Note:** Grants.gov opportunities are downloaded to eResearch on a nightly basis.

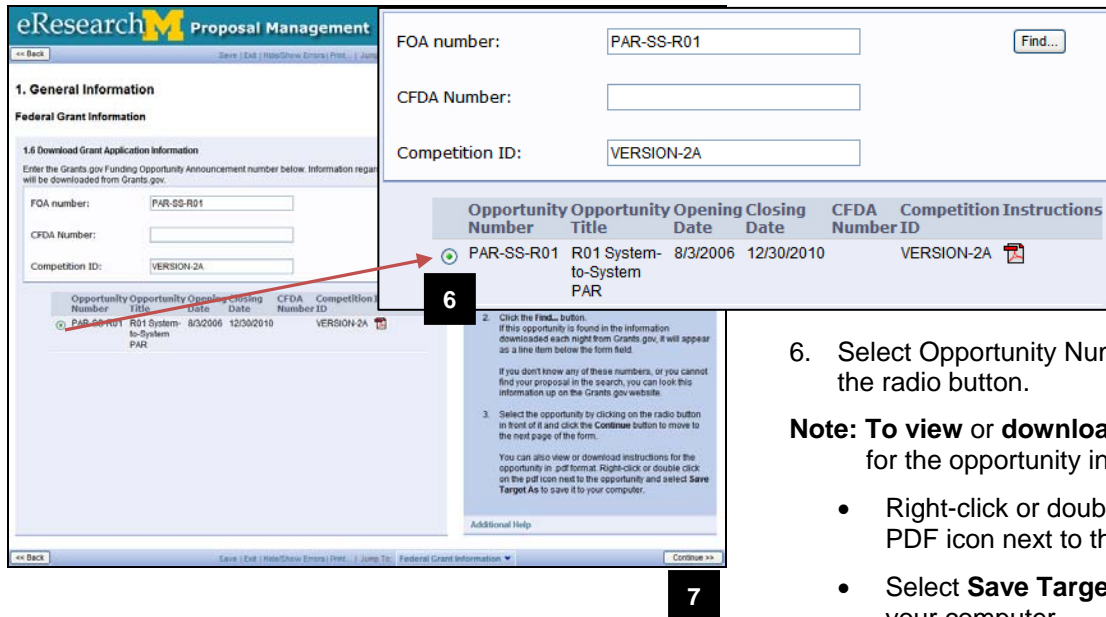
- Enter the **FOA number**.

**Notes:**

- Enter the CFDA Number and/or Competition ID to further refine your search.
- Type the FOA# as specified by the sponsor, using upper and lower case letters, dashes, etc
- If the FOA# unknown, search for it on the Grants.gov website.
- If you use the Grants.gov finder, you must return to eResearch Proposal Management to complete your application.

- Click **Find**.

Federal Grant Information Page



- Select Opportunity Number by clicking the radio button.

**Note:** To view or download instructions for the opportunity in PDF format:

- Right-click or double click on the PDF icon next to the opportunity.
- Select **Save Target As** to save it to your computer.

- Click **Continue** to save and move to the next page.

Sponsor – Grants.gov Page

8. Notice that the FOA Deadline is filled in from the opportunity chosen in Step 5.
9. Complete the rest of the page using the instructions on the page. See the *PAF online course General Information section* for more information.

10. Review the FOA Information.
11. Determine if your **Required Forms & Optional Forms** are supported.



**Yes** appears for supported forms.



Supported forms are forms that are available in the eResearch system. Not all Grants.gov forms have been created for eResearch by our vendor Click Commerce. You will find the majority of NIH, NSF & DOD forms in eResearch.



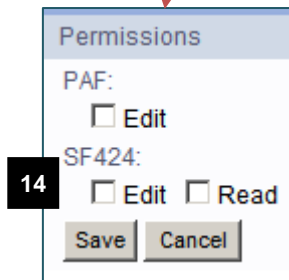
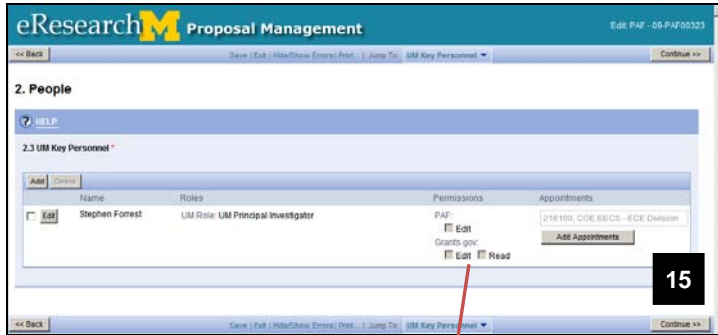
If any Required forms are NOT supported, you must submit to Grants.gov outside of eRPM.



If any Optional forms are NOT supported and you are required to use them, you must submit outside of eRPM.

12. Click **Continue** to save and move to the next page.

People Page



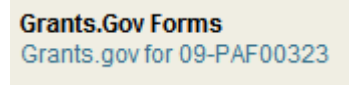
13. Complete the rest of the pages of the PAF Worksheet using the instructions on the page. See the *PAF online course General Information section* for more information.
14. As desired, assign rights to **Edit** and **Read** Grants.gov forms to UM Key Personnel.

**Note:**

- 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.



- Edit rights give access to edit the Grants.Gov Forms. You will see the link from the PAF Workspace.



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

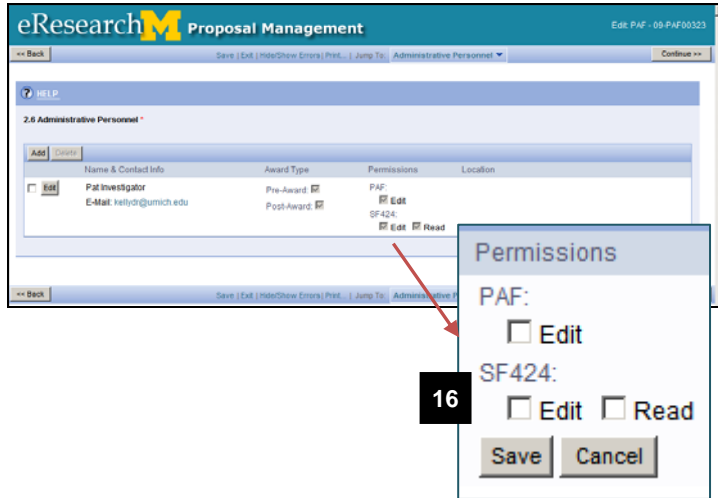
15. Click Continue.

If all of your required Grants.gov forms are supported:

You will notice a delay when you **Save** or click **Continue** to save and move to the next page after completing the People page.

The reason for this delay is that Grants.gov forms are automatically generated for you behind the scenes.

**Administrative Personnel Page**



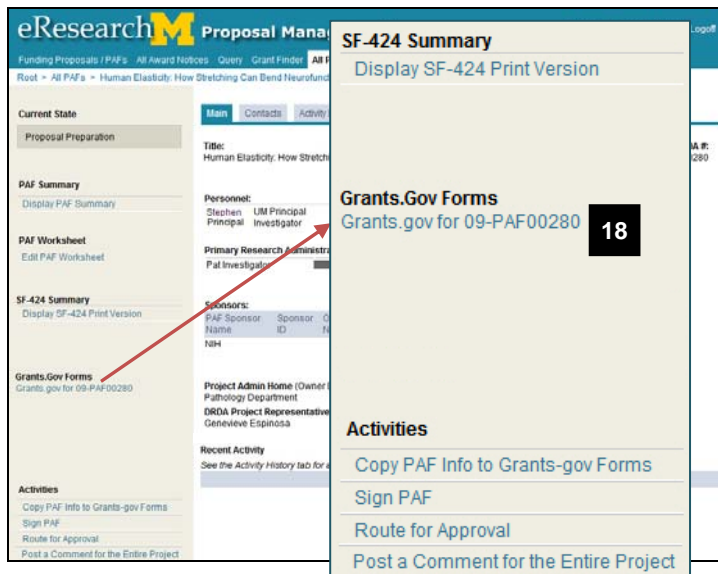
16. As desired, assign rights to **Edit** and **Read** Grants.gov forms to Administrative Personnel.

**Note:**

- The same rules apply regarding Read and Edit rights as outlined in Step 14.

17. Click **Exit** to save and return to your PAF Workspace.

**PAF Workspace**



18. Notice that a link to the Grants.Gov Forms appears in the PAF Workspace.



You have not copied any of the information entered to your PAF Worksheet to the Grants.gov forms yet. This is described in the next section.

**Note:** The link to the Grants.gov forms includes the DRDA number for your proposal (e.g., **09-PAF00280**).



## 2. Copy PAF Info to Grants.gov Forms

Copying PAF Info to Grants.gov Forms copies some fields entered on the PAF worksheet to the Grants.gov forms. Please note that other fields on the Grants.gov forms are pre-populated with standard information where possible.

**Important!** To take advantage of copying information from the PAF to supported grants.gov forms, complete your PAF before your Grants.gov forms.

- You can copy information from the PAF to Grants.gov forms at any time. You may choose to complete the PAF Worksheet first and check for errors (Hide/Show Errors) before copying information.
- Certain PAF questions are mapped to the Grants.gov forms. Data is transferred only from the PAF to the Grants.gov forms. You cannot copy information from Grants.gov forms back to PAF Worksheet.
- If you make a change to the PAF Worksheet, it is not automatically updated in the Grants.gov forms. You need to use the Copy PAF Info to Grants.gov Forms to update this information. It will not reset your Grants.gov forms, but only update the fields mapped for the PAF.

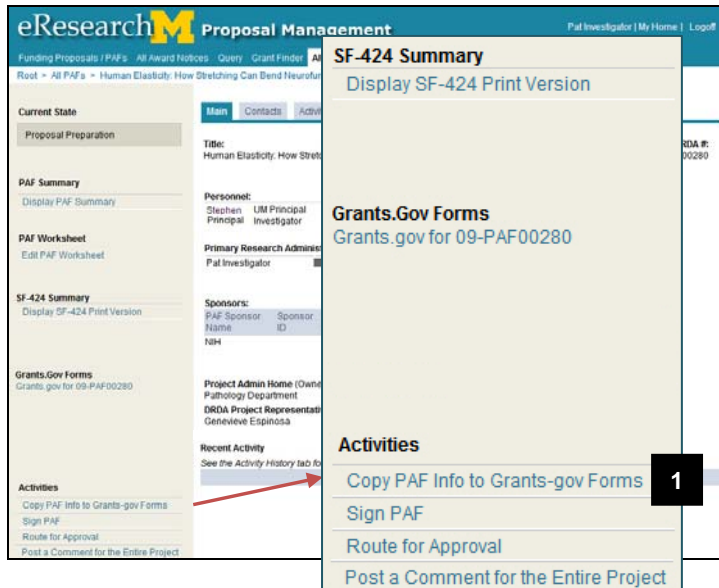


It is not recommended that you edit Grants.gov forms, before copying PAF information. If you do so, you may write over fields that are mapped from the PAF worksheet when you complete the Copy PAF to Grants.gov Form activity.



Complete your Grants.gov forms as early as possible.

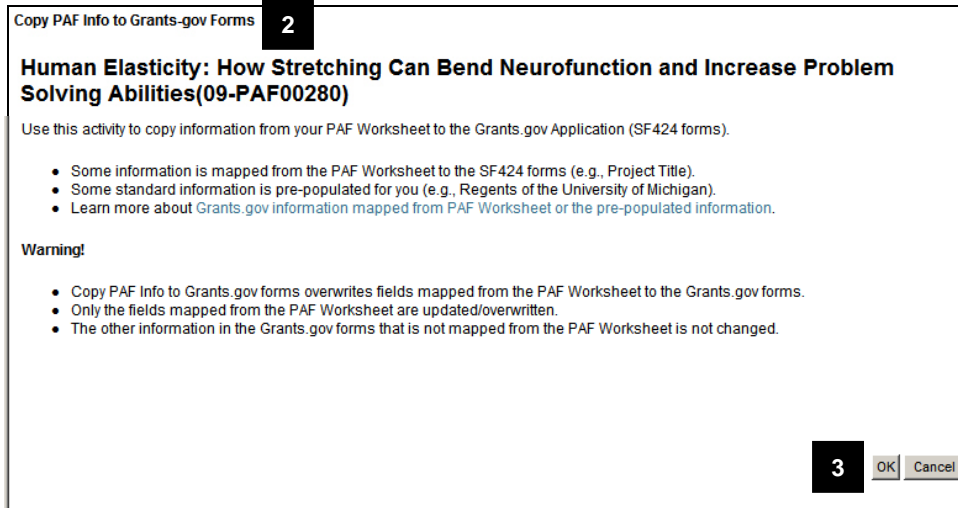
### PAF Workspace



1. Click the **Copy PAF to Grants-gov Forms** activity from the PAF Workspace.

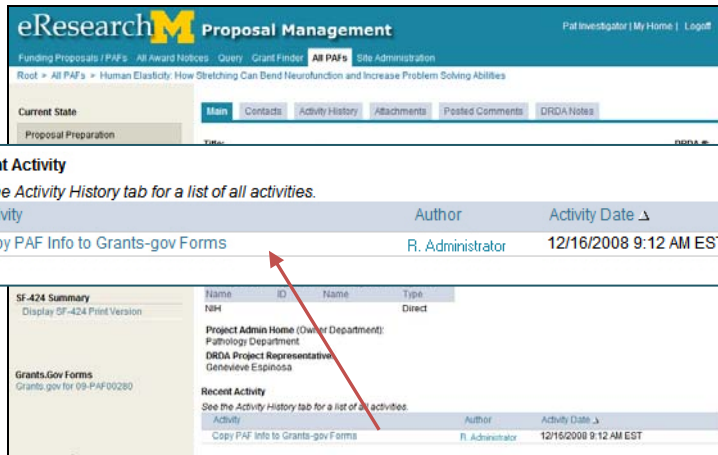
**Note:** The activity is used to initially copy and update the Grants.gov form with certain information entered on the PAF Worksheet.

### Copy PAF Info to Grants.gov Forms Window



2. The **Copy Info to Grants.gov Forms** window appears.
3. Click **OK** to complete the activity and start your data transfer of fields mapped from the PAF Worksheet to the Grants.gov forms.

### PAF Workspace



4. The activity **Copy PAF Info to Grants.Gov Forms** is logged in the Recent Activity.
- Note:** Use the **Copy PAF Info to Grants.gov Forms** activity to update the forms whenever the PAF Worksheet is updated with new or modified data.
5. Go to the next section to learn how to complete the Grant.gov forms.

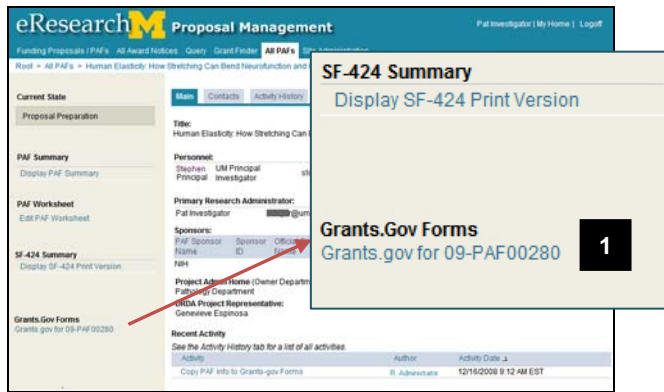
### 3. Complete Grants.gov Forms

When completing the grants.gov forms, remember to copy information from PAF Worksheet first.

After completing the forms, you will need to:

- Validate (check that all required fields completed)
- Submission Pre-Check (check that you meet the Grants.gov validation rules (Strongly recommended))
- Generate a PDF version to review the information entered (Optional)
- Finalize proposal (Required to let DRDA know that the proposal is ready for submission).

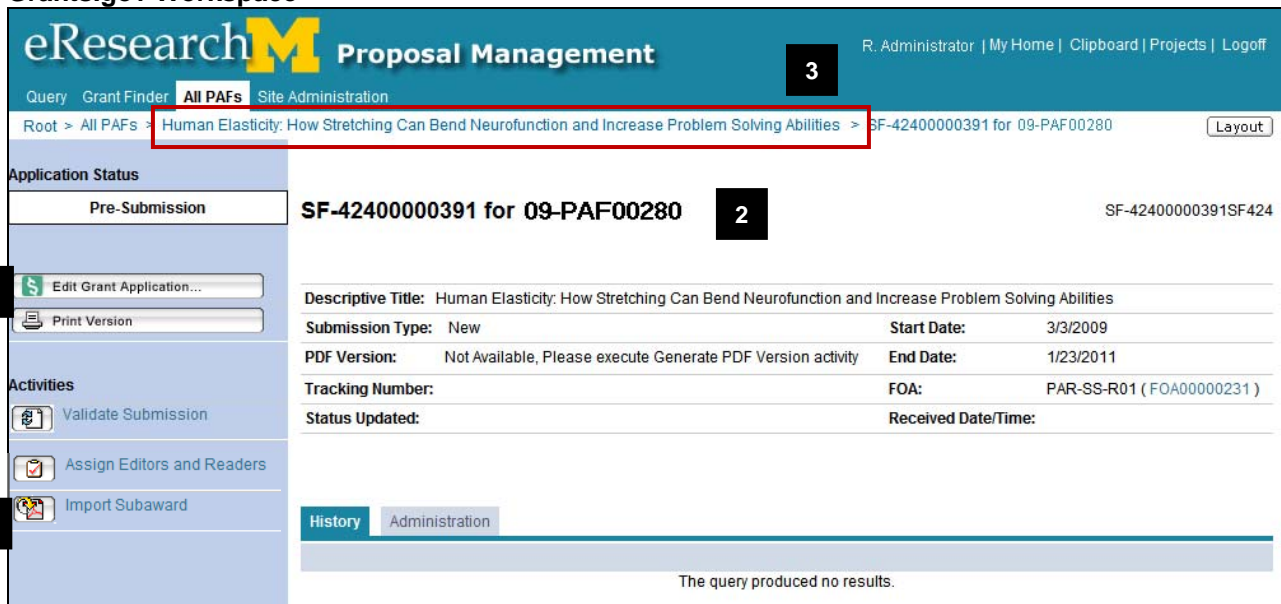
#### PAF Workspace



1. Click the **Grants.Gov Forms** link in the PAF Workspace.

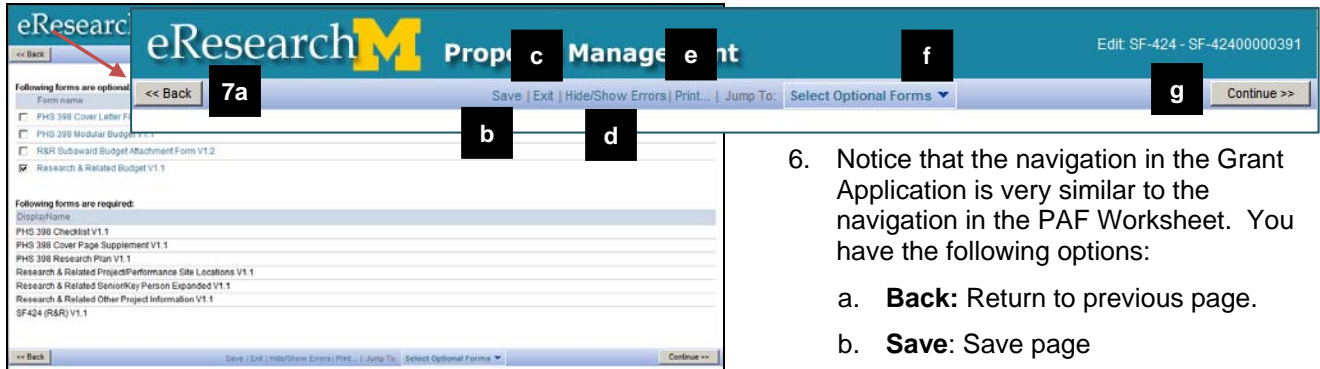
**Note:** As you are completing the Grants.gov forms, individuals with Grant.gov Read can access a printable version from the PAF Workspace, using the Display SF-424 Print Version. After you validate & generate the PDF, the SF-424 PDF is available from the PAF Workspace.

#### Grants.gov Workspace



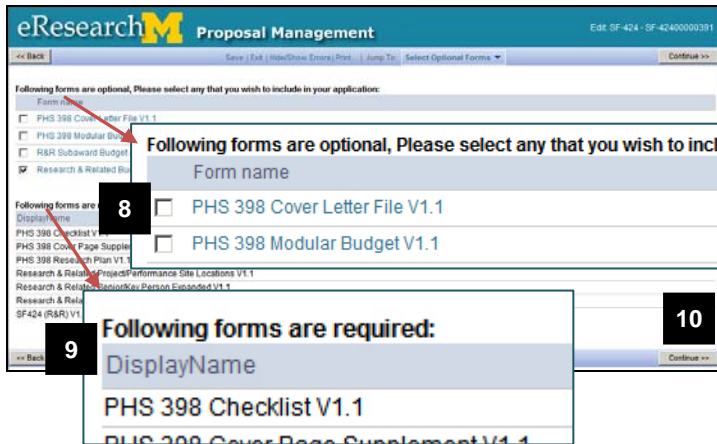
2. The Grants.gov workspace appears.
3. You can return to the PAF Workspace by clicking on the PAF name in the breadcrumb navigation.
4. If you have subawards, download the zip file & send to appointees. Instruct appointees to validate the file. Use **Import Subaward** to upload a copy of the PDF. Upload as many times as needed. PDF must have a **Valid for Submission** status in order to be uploaded.
5. Click **Edit Grant Application...** to edit your Grants.gov forms.

Grant Application



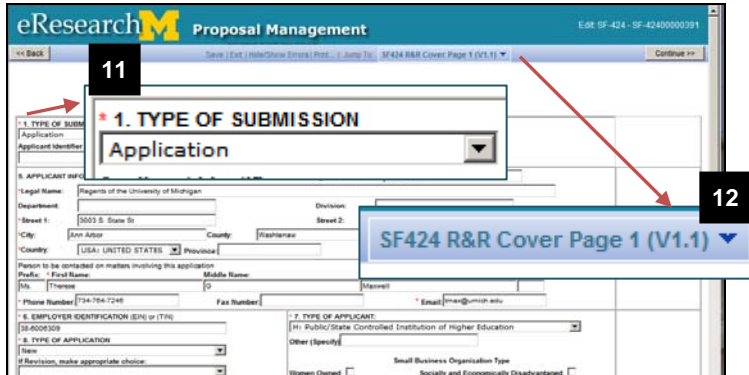
6. Notice that the navigation in the Grant Application is very similar to the navigation in the PAF Worksheet. You have the following options:
  - a. **Back:** Return to previous page.
  - b. **Save:** Save page
  - c. **Exit:** Return to Grants.gov workspace
  - d. **Hide/Show Errors:** Check for errors
  - e. **Print:** Print current page.
  - f. **Jump To List:** Move/jump between pages.
  - g. **Continue:** Save and move to next page.

Grant Application – Select Optional Forms Page



7. Select any optional forms, you want to include in your applications.
8. Required forms are listed.
9. Click **Continue** to save and move to the next page.

Grant Application – SF424 R&R Cover Page



10. Notice that fields required to save a page are marked with a red asterisk (\*).



You cannot save a page until all required fields are completed.

11. Use the **Jump To** list to skip between different pages if you have not completed all required fields on a page.



Jump To is also a workaround to save a partially completed page. When you use Jump To it will save the fields you have completed even if you have not completed **all** the required fields on a page.



You will get an error if you use **Save** or **Continue** to save and move to the next page if you have not completed all of the fields marked with a red asterisk (\*) on the page.

12. Complete all pages of the Grant Application.

**Grants.gov Tips:**

- Work similar to Adobe forms.
- Pay to attention to submission instructions.
- Check your zip code.  
Zip codes are pulled from M-Pathways system with a dash, e.g., 12345-6789. Remove the dash to avoid validation errors, e.g., 123456789.
- Indirect calculations do not round to the nearest dollar.  
Your workaround is to manually adjust.  
Make sure that your budget information totals correctly. The system will not validate your budget totals.
- Position title pulled from “Primary Work Location” M-Pathways Human Resources  
Workaround Change this on the Research & Related Senior Key Person (with Expanded) Profile page. (Unless you completed a Sponsor title. Sponosr titles overwrite this field.)
- Budget page heading rows include 2 lines.

13. See the next sections to learn how to:

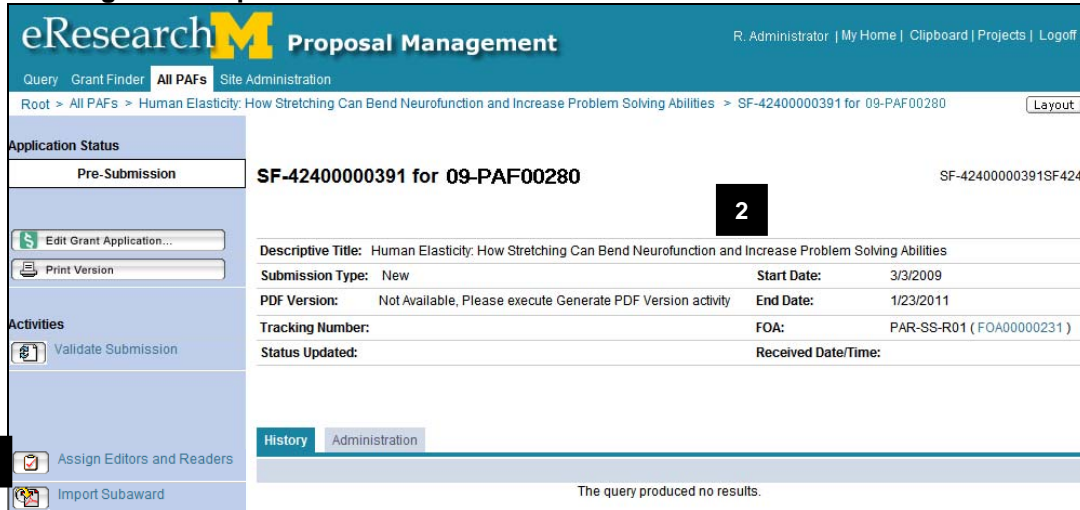
- Assign Editors & Readers
- Validate your entries
- Submission Pre-Check
- Finalize for DRDA



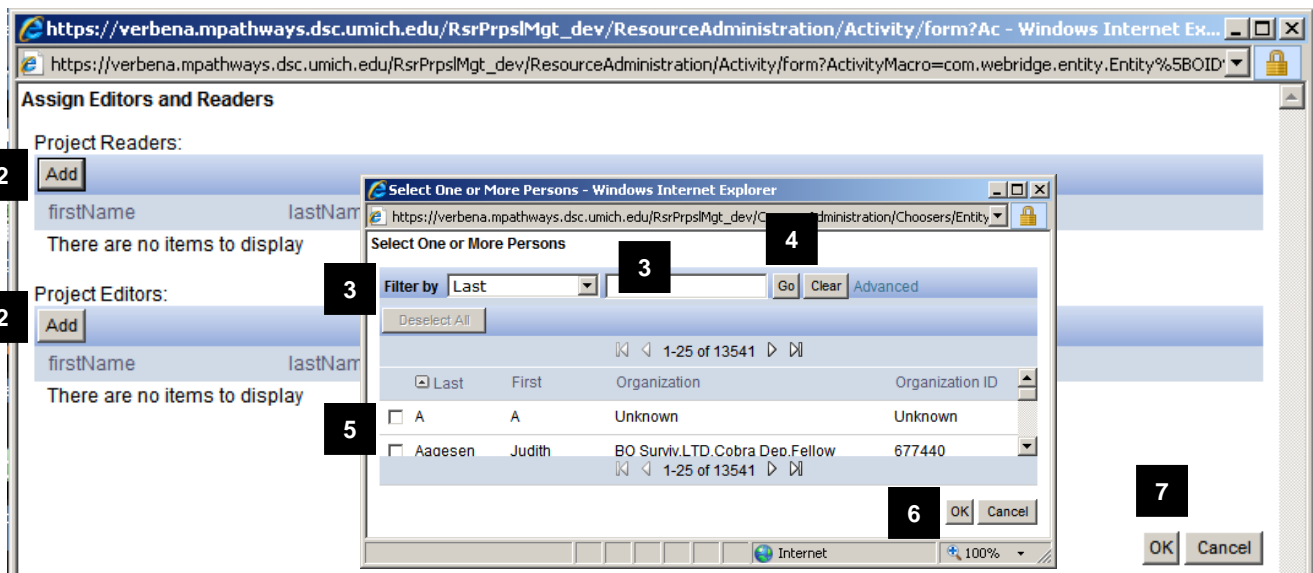
#### 4. Assign Editors & Readers (Optional)

- Assign editors if you have Reviewers that need to edit the Grants.gov forms. (Must have access to the PAF).
- Assign readers if you have additional individuals who have access to the PAF who need the ability to read the Grants.gov forms (e.g., Ad Hoc Reviewers).

#### Grants.gov Workspace



1. Click Assign Editors and Readers activity.
2. Click **Add** to assign a **Project Reader** or a **Project Editor**.
3. Select a **Filter By** criteria, e.g., Last Name, User ID (Kerberos ID) & enter search criteria in text box.
4. Click **Go**.
5. Select the checkbox in front person you want to add.
6. Click **OK** to return to the **Assign Editors and Readers** page.
7. Click **OK** to return to the **Grants.gov Workspace**.



## 5. Validate Grants.gov Forms

After completing the forms, you will need to validate (check for errors).

You must successfully validate (there are no errors) before you can run the "Submission Pre-Check" activity or create a PDF version.



You are performing a level 1 validation. Determines if fields marked with a red asterisk are completed.

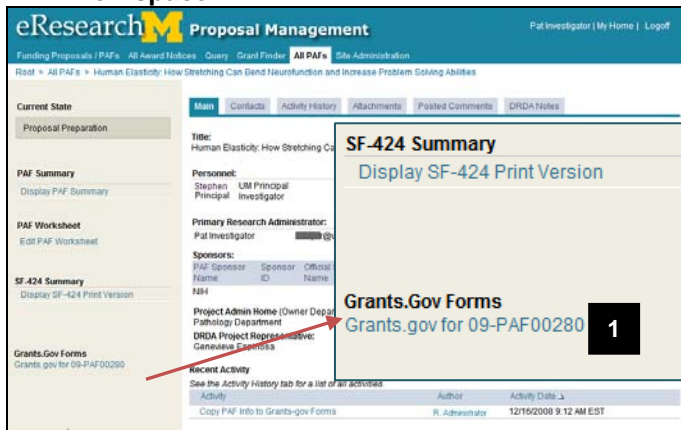


It is strongly recommended that you always complete Submission Pre-Check (level 2 validation) to check against Grants.gov validation rules. As always, the Sponsor will review the application data in greater detail and validate using their criteria.



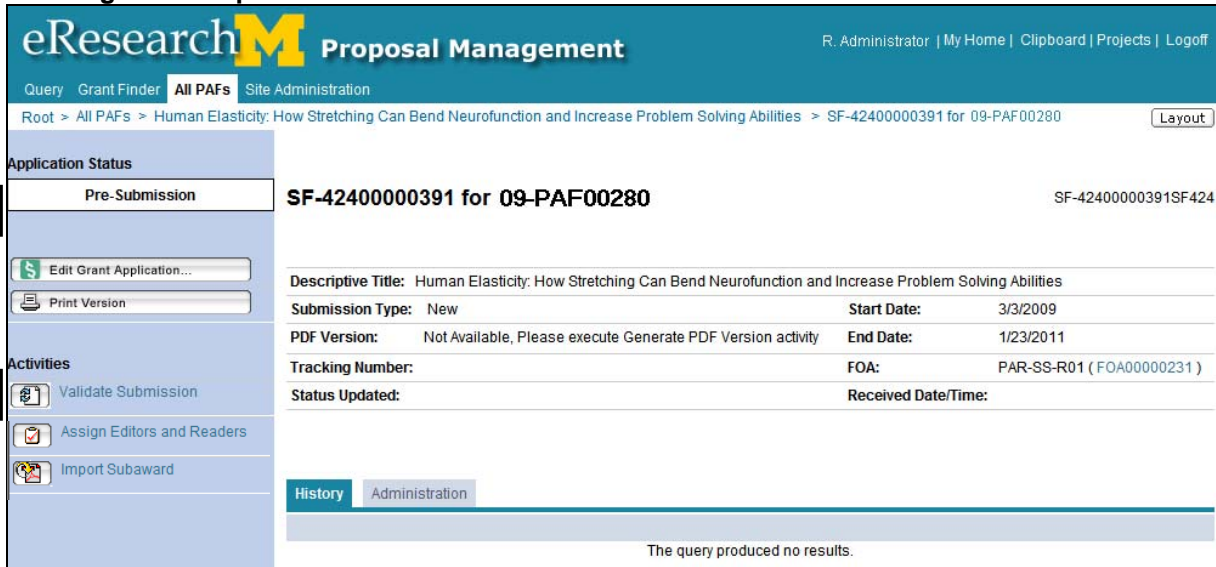
It is possible to successfully validate within eResearch and have the Sponsor return the application due to errors found during the more intensive validation performed by the Sponsor.

### PAF Workspace



1. Click the **Grants.Gov Forms** link in the PAF Workspace.

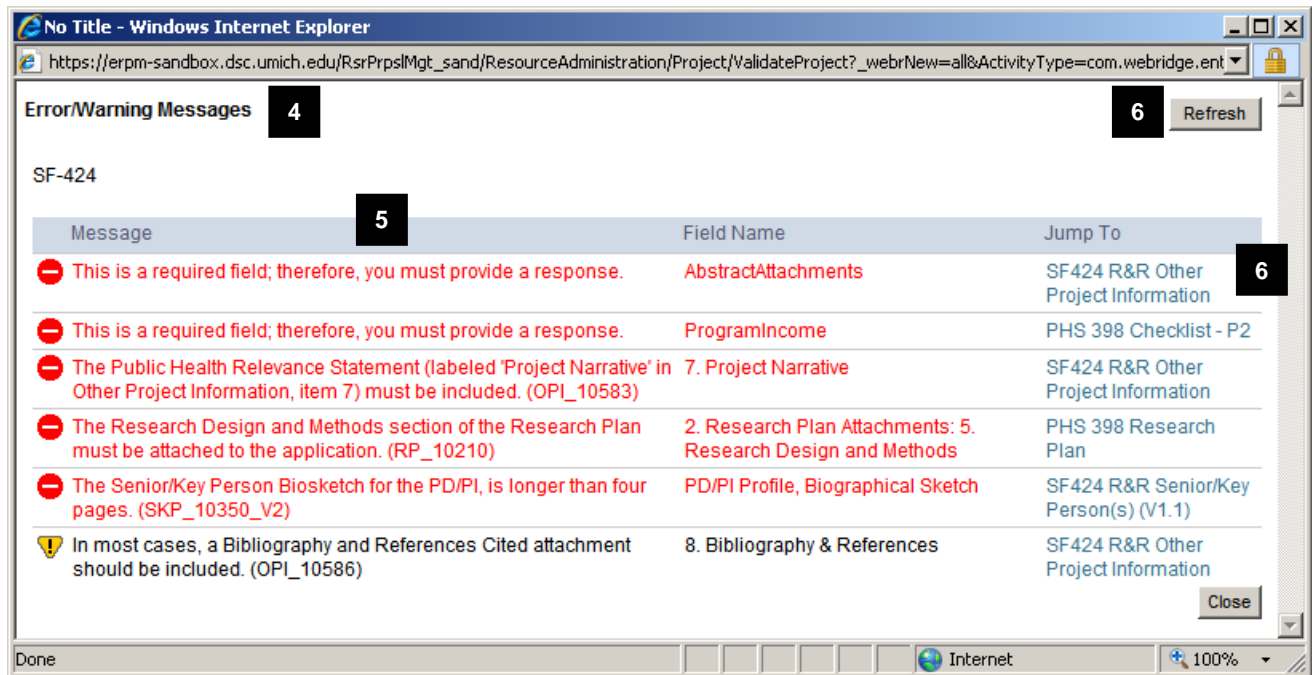
### Grants.gov Workspace



2. Notice that you are in the Grants.gov Workspace and that the status of your application is **Pre-Submission**.
3. After completing all pages of the grant application, click **Validate Submission** from the Grants.gov Workspace.



### Error/Warning Messages



4. If you have errors, the **Error/Warning Messages** window appears.
5. Review your list of errors (if you have errors).
6. Fix errors, save, and refresh to determine if you have corrected the errors.
7. Revalidate after you have corrected all the errors.

### Validate Submission

Validate Submission

Following optional form(s) will be included in your application:  
Research & Related Budget V1.1

Following required form(s) will be included in your application:  
 PHS 398 Checklist V1.1  
 PHS 398 Cover Page Supplement V1.1  
 PHS 398 Research Plan V1.1  
 Research & Related Project/Performance Site Locations V1.1  
 Research & Related Senior/Key Person Expanded V1.1  
 Research & Related Other Project Information V1.1  
 SF424 (R&R) V1.1

**8**

8. Click **OK** to validate your submission.

### Grants.gov Home Workspace

The screenshot shows the Grants.gov workspace for application SF-42400000391 for 09-PAF00280. The application status is 'Valid for Submission'. A history log entry shows 'Submission validated' by R. Administrator on 1/31/2009 at 10:36 PM EST. Navigation options include 'View Grant Application...', 'Print Version', 'Generate PDF Version', 'Assign Editors and Readers', 'Reopen for Edit', and 'Submission Pre-Check'.

9. Notice that you are returned to the Grants.gov Workspace and the status of your application has changed to **Valid for Submission**.

10. Your activity **Submission validated** is logged in the history. It notes who validated and when it was validated.

11. You no longer have the option to edit the grant application. You can **View Grant Application**.

12. If you need to make changes, click **Reopen for Edit**. (You will need to validate again after making changes.)



It is strongly recommended that you complete a Submission Pre-Check to validate your data against the Grants.gov validation rules.



You must Finalize the proposal before DRDA can submit.

## 6. Submission Pre-Check

After validating (performing your level 1 error check), you can:



Use the PDF Version to review the final application (see next section).

- It is strongly recommended that you complete a Submission Pre-Check to validate your data against the Grants.gov validation rules. You must validate first to transform your data into an XML file that can be read by the Grants.gov validation rules.

### Grants.gov Home Workspace

The screenshot shows the 'Application Status' section for application SF-4240000391 for 09-PAF00280. The 'Valid for Submission' status is shown. Under the 'Activities' section, the 'Submission Pre-Check' option is highlighted with a '1' in a black box. Other activities include 'Generate PDF Version', 'Assign Editors and Readers', and 'Reopen for Edit'. The 'History' tab shows a 'Submission validated' entry.

13. Click **Submission Pre-Check**.



You cannot run the Submission Pre-Check until you have successfully validated. The **Application Status** must be **Valid for Submission**.



It will take some time to complete this activity because all data entered on the Grants.gov forms is checked against the Grants.gov validation rules.

### Submission Pre-Check Errors

The dialog box displays the following error messages:

- Cannot load schema for the namespace 'MetaGrantApplication' - The remote server returned an error: (502) Bad Gateway..
- The 'MetaGrantApplication:GrantApplication' element is not declared.
- The 'Header-V1.0:GrantSubmissionHeader' element is not declared.
- Could not find schema information for the attribute 'Global-V1.0:schemaVersion'.
- The 'Global-V1.0:HashValue' element is not declared.
- Could not find schema information for the attribute 'Global-V1.0:hashAlgorithm'.
- The 'Header-V1.0:AgencyName' element is not declared.

Buttons for 'OK' and 'Cancel' are visible at the bottom right, with a '5' in a black box next to them.

14. Your eResearch Grants.gov forms have been validated against the Grants.gov validation rules.

15. If errors are returned, re-open the forms for editing, make corrections, re-validate, and then run the "**Submission Pre-Check**" again.

OR

### Submission Pre-Check Success

The dialog box displays the message: "Generated Grants Xml File is valid." Buttons for 'OK' and 'Cancel' are visible at the bottom right, with a '5' in a black box next to them.

16. If the XML file is valid, double check your sponsor submission instructions to ensure that all sponsor requirements have been met.

E.g., some sponsors require that attached documents (PDFs) must be in a specific order.

17. Click **OK** to return to the Grants.gov Workspace.

## 7. Generate PDF Version

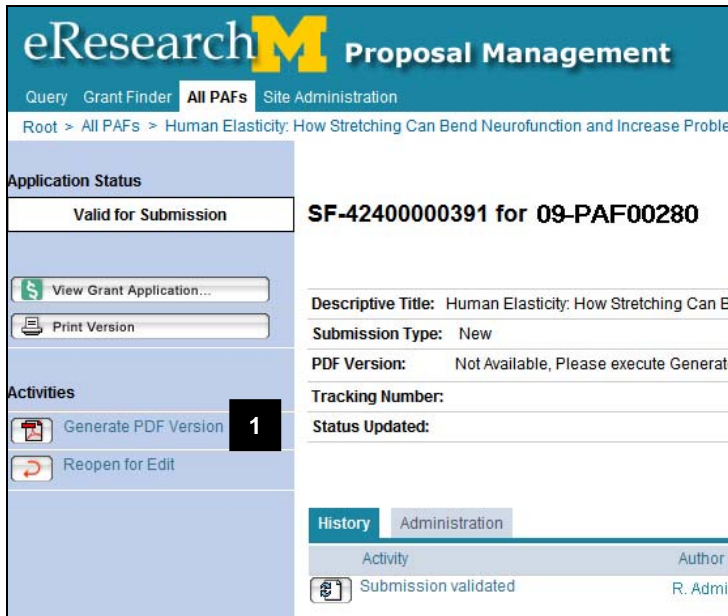
After validating (checking for errors):



Use the PDF Version to review the final application.

- Generating a PDF will show the PI/Project Team the final application (all information entered on the Grants.gov forms and the attachments), but it does NOT interleaf the attachments in the correct order.
- The PDF version is not what is submitted. The underlying data entered on the forms and attachments is the application information submitted. It will be submitted in the correct order.
- It is recommended to generate a PDF version for review before finalizing the proposal (letting DRDA know that the proposal is ready for submission).

### Grants.gov Home Workspace



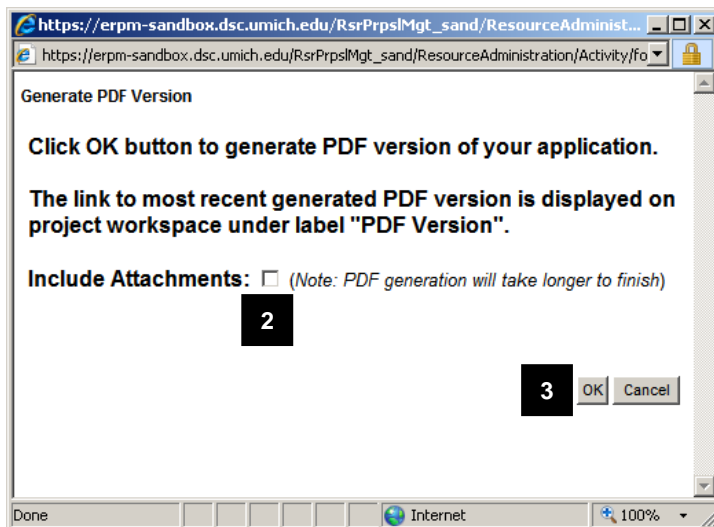
The screenshot shows the 'eResearchM Proposal Management' interface. Under the 'Activities' section, the 'Generate PDF Version' button is highlighted with a black box containing the number '1'. Other visible elements include the 'Application Status' (Valid for Submission), 'View Grant Application...', 'Print Version', and a 'History' table showing a 'Submission validated' entry.

1. Click **Generate PDF Version**.



You cannot generate a PDF version until you have successfully validated.

### Generate PDF Version



The screenshot shows a dialog box titled 'Generate PDF Version'. It contains the following text: 'Click OK button to generate PDF version of your application.', 'The link to most recent generated PDF version is displayed on project workspace under label "PDF Version".', and 'Include Attachments:  (Note: PDF generation will take longer to finish)'. The checkbox is highlighted with a black box containing the number '2'. At the bottom right, the 'OK' button is highlighted with a black box containing the number '3'.

2. If you want to include attachments, click the box by **Include Attachments**.

**Note:** It takes longer to create a PDF with attachments.

3. Click **OK**.

Grants.gov Home Workspace

The screenshot shows the eResearch Proposal Management interface. At the top, there is a navigation bar with the eResearch logo and 'Proposal Management' text. Below this is a breadcrumb trail: 'Root > All PAFs > Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities > SF-4240000391 for 09-PAF00280'. A 'Layout' button is visible in the top right.

The main content area is divided into several sections:

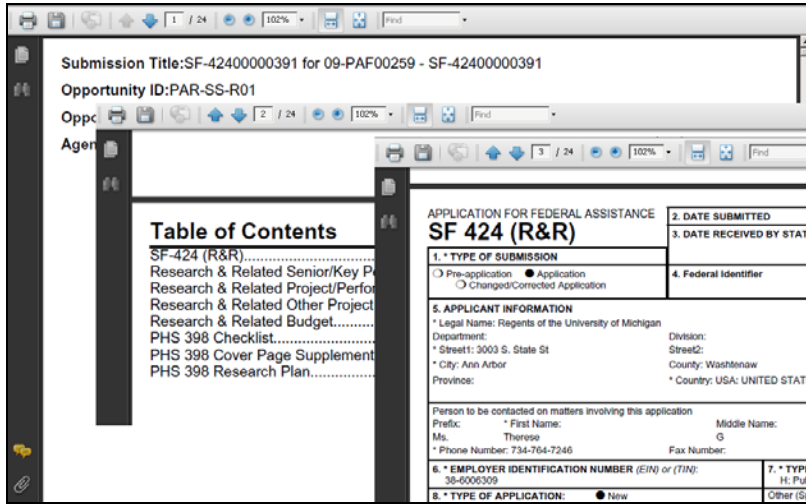
- Application Status:** Shows 'Valid for Submission' for 'SF-4240000391 for 09-PAF00280'. A reference number 'SF-4240000391SF424' is also present.
- Activities:** Includes buttons for 'View Grant Application...', 'Print Version', 'Generate PDF Version', and 'Reopen for Edit'.
- Descriptive Information:**
  - Descriptive Title: Human Elasticity: How Stretching Can Bend Neurofunction and Increase Problem Solving Abilities
  - Submission Type: New
  - PDF Version: [View] **5**
  - Tracking Number: **5**
  - Status Updated: **5**
  - Start Date: 3/3/2009
  - End Date: 1/23/2011
  - FOA: PAR-SS-R01 (FOA00000231)
  - Received Date/Time:
- History:** A table with columns 'Activity', 'Author', and 'Activity Date'.
 

Activity	Author	Activity Date
Generated PDF Version	R. Administrator	1/31/2009 10:59 PM EST
Latest PDF version is available on workspace summary		
Submission validated	R. Administrator	1/31/2009 10:36 PM EST

4. In the History, **Generate PDF version** is logged.
5. Click **View** to review the PDF Version.



**Grants.gov Application PDF Version**



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6. View the PDF of the Grants.gov application.

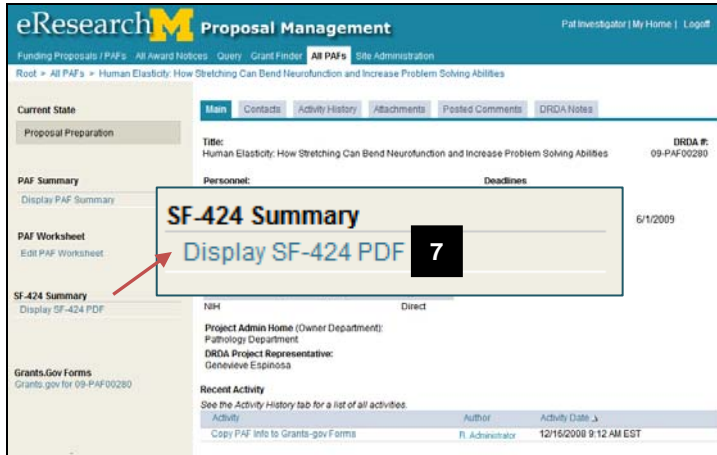


The PDF version of the Grant.gov application is only a Review Tool.



When DRDA submits your application to Grants.gov, the actual data you entered on the application and supporting attachments are submitted, not this PDF. It is a system to system transmission of the data you entered.

**PAF Workspace**



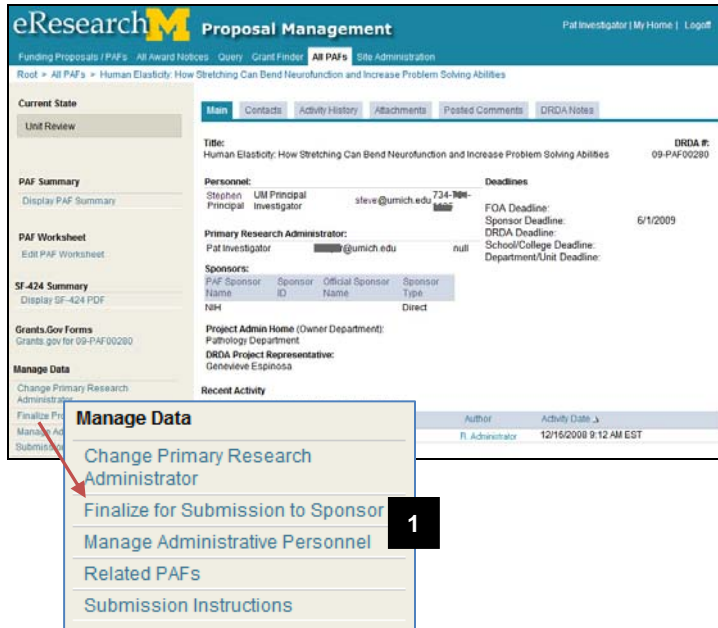
7. After generating the PDF version, you can access it from the PAF Workspace. Under SF-424 Summary, **Display SF-424 PDF** is available.

## 8. Finalize Grants.gov forms for DRDA Submission

After completing your Grants.gov application, validating your submission, and generating your SF-424 PDF to review your submission, you are ready to finalize the Grants.gov forms for DRDA submission.

**Important!** Manage Data is not available until you route the proposal for approval. Notice on the screen shot below the Current State of the proposal is Unit Review.

### PAF Workspace



1. Click **Finalize for Submission to Sponsor** under Manage Data.

**Note:** This allows you to update/enter information to Finalize the Proposal. You originally saw this page when completing the PAF Worksheet.

Using Finalize Proposal under Manage Data, you do not need to make changes to the PAF Worksheet.

Please wait to Finalize Proposal until you are ready for DRDA to submit.



Finalize for Submission to Sponsor

The screenshot shows the eResearch Proposal Management interface. At the top, there is a header with the eResearch logo and 'Proposal Management'. A navigation bar contains 'Hide/Show Errors | Print... | Jump To: Finalize Proposal for DRDA' and buttons for 'OK', 'Cancel', and 'Apply'. The main content area is titled 'Gain-Assisted Nanoscale Surface Plasmon Resonators (09-PAF00714)'. Below the title, there is a section for indicating the readiness of final proposal documents. A '2' in a black box highlights the first checkbox: '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?)'. Below this is another checkbox: 'Check here to indicate that the Final Proposal has been uploaded to the sponsor's system.' A '3' in a black box highlights the 'Finalize Proposal for DRDA' dropdown menu. Below the checkboxes is a 'HELP' section with a 'Final Proposal:' heading and a table for uploading files. The table has columns for 'File', 'Version', 'Browse', 'Title', and 'Type'. The 'Type' column has a dropdown menu set to 'Proposal' and an 'Attach' button.

2. To confirm that your Grant.gov forms in eResearch are ready for submission to the sponsor, click the **Finalize** box

**Note:** To be ready for submission they must be complete and validated successfully (no errors). The state in the Grants.gov workspace is **Valid for Submission**.

3. Click **OK** to finalize for DRDA submission.

**Topic 6: Post a Comment and Activity History**

Goal/outcome:

Understand how to use the post a comment activity and view recent activity history. In class, we will use the Post a Comment activity to request the UM PI to sign the PAF. It can be used anytime you permanently want to attach a comment to a PAF/Project or email a link to the PAF/Project.

Objectives:

After completing this module, you will be able to:


- Post a comment to the entire project
- View activity details

<b>Materials</b>	<b>Page</b>
Post a Comment for Entire Project (step by step procedure)	97
Posted Comment for Entire Project Email (sample email)	99

## Post a Comment

Anyone can use the Post a Comment for the Entire Project activity in eResearch Proposal Management to communicate with others involved in the project.


- Comments can be posted during every state and by anyone with access to the project.
- You can select to e-mail individual listed on the PAF Worksheet your comments.

 Tips for emails from eResearch:

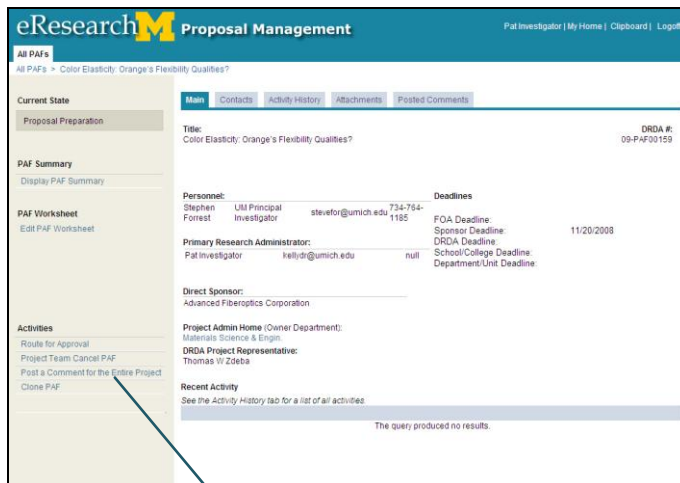
- Emails sent from eResearch system will have a link to the PAF Workspace. Individuals must login with Kerberos ID & password.
- Add [eresearch@umich.edu](mailto:eresearch@umich.edu) to your address book/contacts or safe/trusted senders list so messages are not sent to junk or spam mail.
- **Plain text 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 breaks links to eResearch system. To view, login to eRPM and find proposal/project/award.
- **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view proposal/project/award in eResearch.
- **Warning!** You cannot copy a link from eResearch and paste it into a web browser. It will not work.

### Important Information

- Post a Comment is a communication tool only and will not update or route your PAF for approval.

 Messages/notes/comments posted are permanent and visible to anyone with access to the PAF.

### PAF Workspace



1. Click the **Post a Comment for the Entire Project** activity from the PAF Workspace.

**1** Post a Comment for the Entire Project

### Post a Comment for the Entire Project Window

Post a Comment for the Entire Project

**Color Elasticity: Orange's Flexibility Qualities? (09-PAF00159)**

Comments and attached documents are:

- Permanently posted to the proposal's Project Workspace
- Visible to ANYONE WHO CAN VIEW this proposal

Enter Comments:

**2**

Attach documents that are related to your comment. Do NOT attach revised proposal documents here. Revised proposal documents should be attached to the appropriate section of the PAF. Posting a comment is a communication tool only, and will not update, make changes, or submit your proposal.

See Help for more information on working with documents.

**3** Add

Name	Version
There are no items to display	

**4** Select Email Recipients (Optional):  
People selected below will receive an email that a comment has been posted to the PAF. The email will include the comment text. The comment and attachment(s) can be viewed from the PAF's Project Workspace in the system.

Key Project Personnel  
 Stephen Forrest (Materials Science & Engin., 221800)

Administrative Project Personnel  
 Pat Investigator

DRDA Project Representative  
 Thomas Zdeba

Click OK to save your comments, attached documents, and email the individuals selected above.  
**Warning!** Comments and the related comments documents cannot be removed after you click OK.

Click Cancel to close this window without saving comments and/or attached documents.

**5** OK Cancel

2. Enter comments. (Character limit = 2000).
3. Click **Add** to upload documents if needed.
4. Optional, select **Email Recipients**.
5. Click **OK** to post comment to project, send email to selected email recipients and return to the PAF Workspace.

### PAF Workspace

**6** 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/COI. Email Recipients: Stephen Forrest	Pat Investigator	11/11/2008 12:26 PM EST

6. Notice that **Comment Posted for the Entire Project** is logged in the Recent Activity list.

**Note:** It logs who performed the activity (author) and the activity date time.

**Posted Comment for the Entire Project Email**

The following is an example of an email notification generated by eRPM to alert specified people (selected by the person posting the comment) that a comment was posted.

The email subject line is "Post a Comment for the Entire Project Activity".

**Email Sample**

The following comments have been posted for the PAF referenced below.

**Comments:**  
Ready for your signature

**Email Recipients:**  
Stephen Forrest

**Posted by:** Jason Johnson

**PAF Information:**  
**DRDA Number:** [09-PAF00087](#)  
**PAF Title:** elwa\_Mice Metabolism as a Theoretical Model for Landfill Reduction  
**PI:** Stephen Forrest  
**Project Administrative Home:** 216100 COE EECS - ECE Division  
**Primary Research Administrator:** Jason Johnson

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth  
**Sponsor Deadline:** 11/20/2008

**Click here to access the PAF:** [09-PAF00087](#)

**Questions:**

1. Refer to [online help](#) for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

<http://www.eresearch.umich.edu/>

## Topic 7: Sign PAF and Conflict of Interest Statement

Goal/outcome:

Familiarize yourself with how the UM PI signs the PAF and Conflict of Interest Statement in order to assist UM PIs that need to sign the PAF Conflict of Interest Statement.

Objectives:

After completing this module, you will be able to:

- Identify the process used for the UM PI to sign the PAF.
- Recognize that a PI can change the Conflict of Interest after initially signing it.

<b>Materials</b>	<b>Page</b>
View and Print a PAF Summary (step by step procedure)	101
PI Sign PAF Conflict of Interest (step by step procedure)	103

## View and Print a PAF Summary

The PAF summary is a non-editable, printable view for review of all information entered on the PAF Worksheet. Edits are made using Edit PAF Worksheet view.

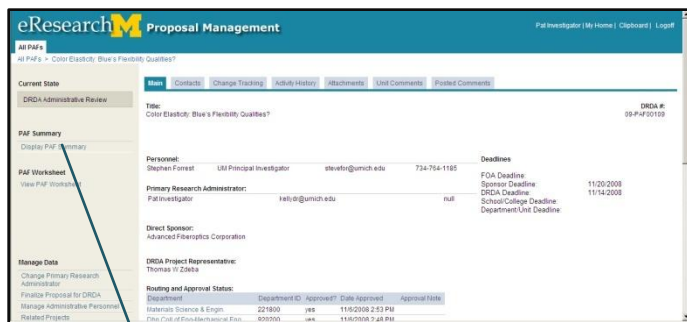
The PAF Summary includes:

- All information entered on the PAF worksheet
- All attached/uploaded documents (including supporting documents & final proposal documents)
- PI/ Conflict of Interest Statement Signatures
- Unit Approval Signatures
- DRDA Approval Signature
- Routing and Submission Information

Certain actions can be completed from the PAF Summary based on your role.

- UM Principal Investigator can sign PAF/Conflict of Interest Statement from PAF Summary.
- Reviewers can Request Changes or Unit Approve from the PAF Summary.

### PAF Workspace



1. From the PAF Workspace, click **Display PAF Summary**.



PAF Summary

- 2. View the PAF Summary.
- 3. When are finished viewing the PAF Summary, click **OK** to return to the PAF Workspace.
- 4. If you want to print, click **Print** to display print preview.

- 5. Click **Print**.

- 6. Select Print Options and click **Print**.

## PI Sign PAF Conflict of Interest

The PI can elect to sign the PAF using 2 methods:

1. Sign PAF activity in the PAF Workspace
2. Sign PAF in the PAF Summary (PAF Workspace->Display PAF Summary->click Sign PAF)

This document is broken into five sections:

- I. Login to eResearch Proposal Management
- II. Home Workspace
- III. PAF Workspace
- IV. Sign PAF from PAF Workspace
- V. Sign PAF from PAF Summary

### I. Login to eResearch Proposal Management

#### eResearch Home Page



1. Go to <http://eresearch.umich.edu/>.
2. Click **Login** under Proposal Management.

**Important!**

If you are using eResearch Proposal Management as part of the pilot (before March 2009 all campus release), to login go to: <http://www.umich.edu/~eresinfo/erpm/pilot.html>

#### UM Authentication Required Page



3. Enter your **Login ID** (username or Friend ID) and your **Password**.

**Notes:**

- An MToken is not required to use eResearch.
- If you are a non-UM user, refer to the *Obtaining a Friends Account Step-By-Step Procedure* for more information.

4. Click **Login**.

**Important!**

The UM Principal Investigator logging in here authenticates him-/herself as the user.

This will allow the PI to electronically sign the Conflict Interest Statement and the PAF.

Verify Information

5. The first time you login to eResearch you will be prompted to verify your contact information.

Enter your contact information, filling in all fields marked with a red asterisk (\*).

**Notes:**

Your address is populated from your office address from the M-Pathways Human Resources system.

To change your work address:

Complete the Address/Personal Data Form (30005) and return it to the Human Resource Records Office and they will update the address in the hr address data base.

<http://www.hr.umich.edu/hrris/forms/pdfs/Addr-PersData2.pdf>

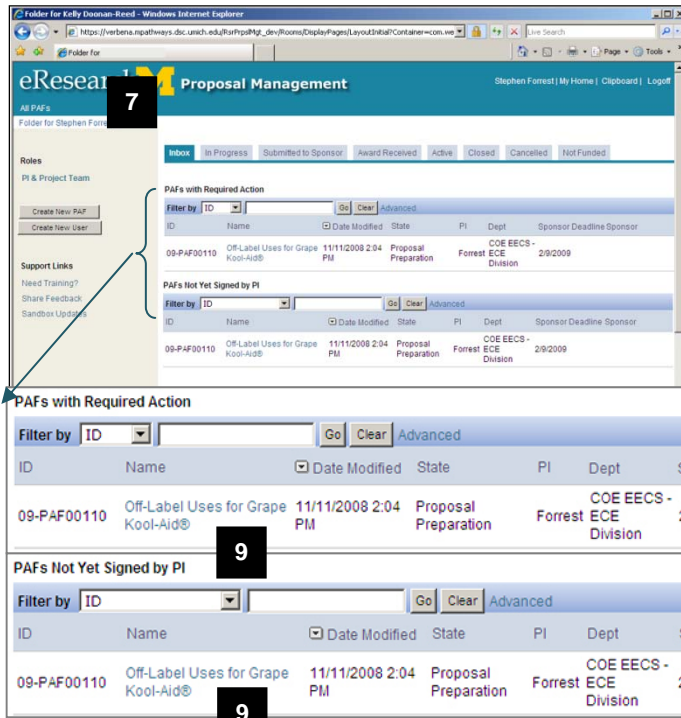
You can only have one address in eResearch.

Your address will be maintained automatically for you. The eResearch system has a nightly feed from the M-Pathways system to update addresses

6. Click **Submit**.

## II. Home Workspace

### Home Workspace for PI



- eResearch Proposal Management opens and displays your **Home Workspace**.
- The PAF that needs to be signed appears in:

#### PAFs with Required Action

#### PAFs Not Yet Signed by PI

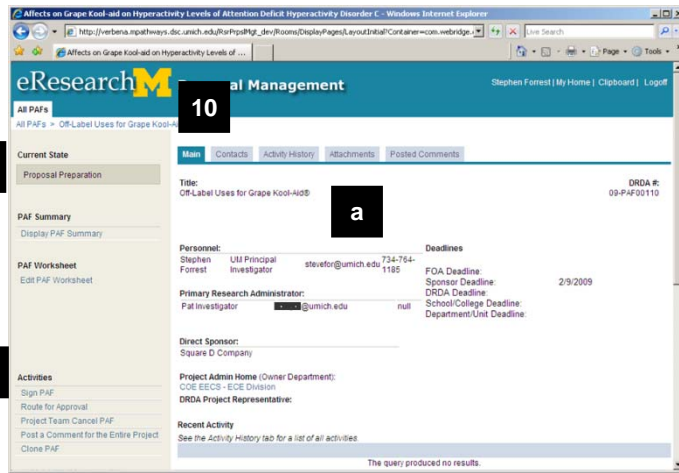
because it is still being worked on and has not been signed by the UM Principal Investigator (PI) yet.

#### Note:

- PAFs with Required Action** - Displays all PAFs that you need to do something with (e.g., completing PAF, make changes & submit changes, route for approval, etc.)
  - PAFs Not Yet Signed by PI** - Displays all PAFs that have not yet been signed by UM PI. PAF can appear in both PAFs with Required Action & PAFs Not Yet Signed by PI. Use this to quickly find a list of PAFs where UM PI still needs to sign PAF/ Conflict of Interest Statement.
- Click on the PAF from either section (since it appears in two places) to access the PAF Home Workspace in order to sign PAF/ Conflict of Interest Statement.

III. PAF Workspace

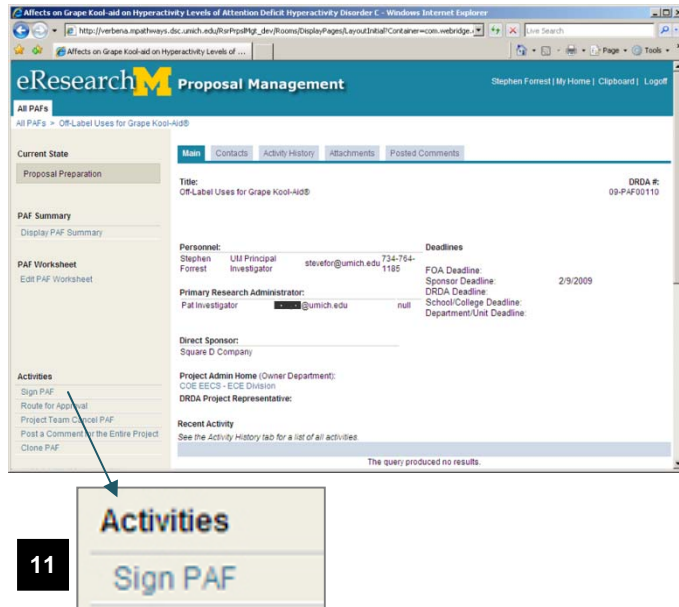
PAF Workspace



10. The PAF Home Workspace appears. It allows you to:
  - a. View information regarding the PAF (e.g., basic information, reviewers, activity history, comments, etc.)
  - b. View Current State of PAF/proposal. E.g., Proposal Preparation (still being completed), Unit Review (being reviewed by unit), DRDA Review, etc.
  - c. Complete activities related to the PAF/proposal (e.g., Edit PAF Worksheet, Sign PAF, Route for Approval, etc.).

IV. Sign PAF Activity

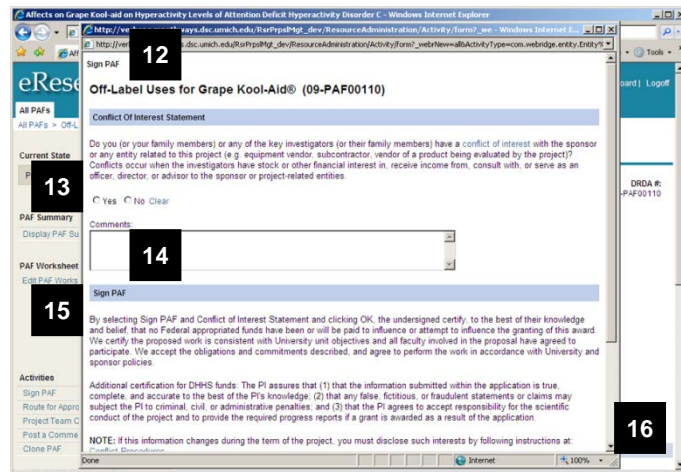
PAF Workspace



11. To sign the PAF, click **Sign PAF** under activities.

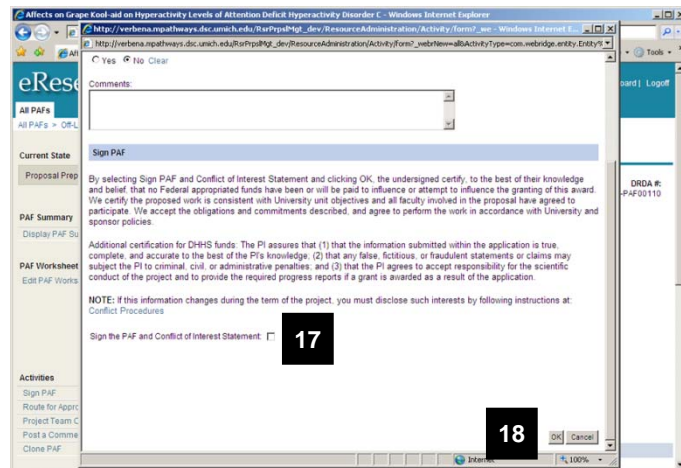


Sign PAF



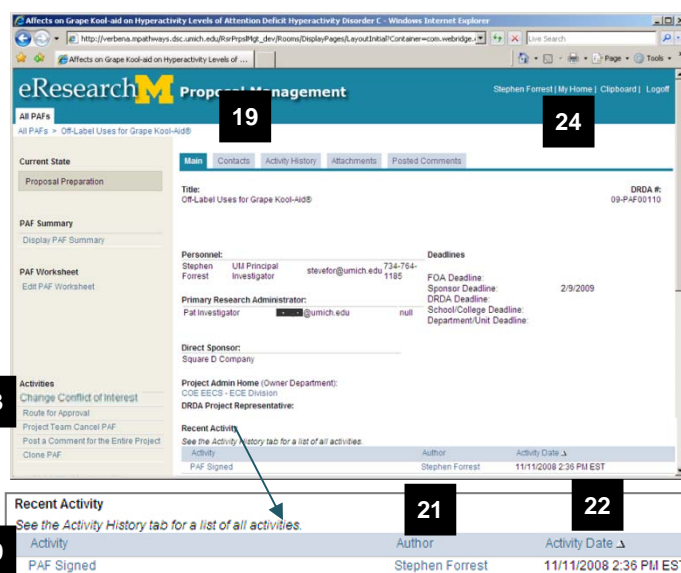
12. The **Sign PAF** window appears.
13. Read the **Conflict of Interest Statement** and answer the question below.
14. If needed, enter **Comments**.
- Important!** Comments are required if you answer Yes to the Conflict of Interest question.
15. Read the **Sign PAF** statement.
16. Scroll down the page.

Sign PAF (continued)



17. Select the Sign the **PAF and Conflict of Interest Statement** box to electronically sign the PAF.
18. Click **OK** to complete your electronic signature of the Conflict of Interest Statement and the PAF.

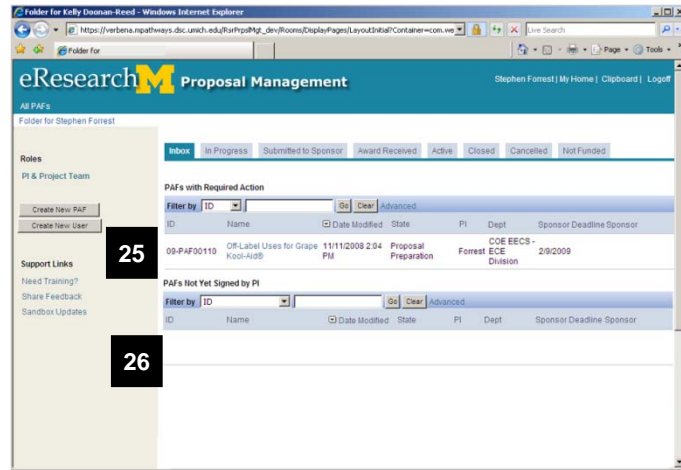
PAF Workspace



19. You have electronically signed the PAF and are returned to the **PAF Workspace**.
20. **PAF Signed** line has been added to the Recent Activity
21. PI who signed the PAF, e.g., Stephen Forrest, is the **Author**
22. When the PAF was signed is the **Activity Date**
23. You can at any time go back and use the **Change Conflict of Interest** activity to make changes to your conflict of interest.
24. Click **My Home** to return to your Home Workspace and view that this PAF no longer appears in the PAFs Not Yet Signed by PI section.



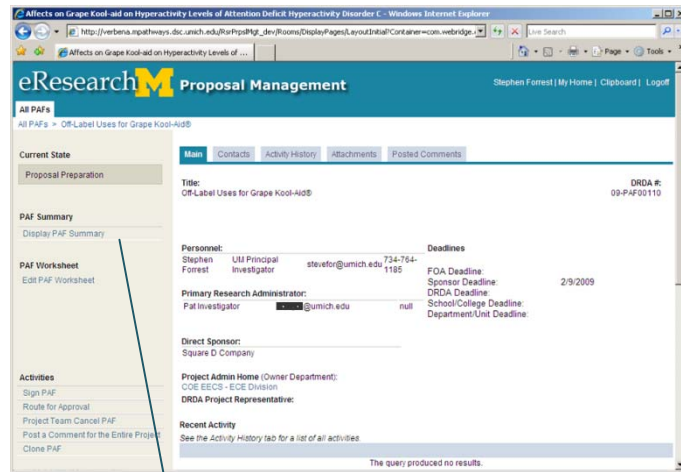
Home Workspace for PI



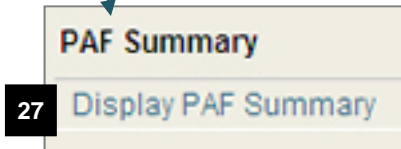
- 25. Notice that PAF appears in the **PAFs with Required Action** because it is still being worked on.
- 26. It no longer appears in **PAFs Not Yet Signed by PI** because the PI signed the PAF.

IV. Sign PAF from PAF Summary

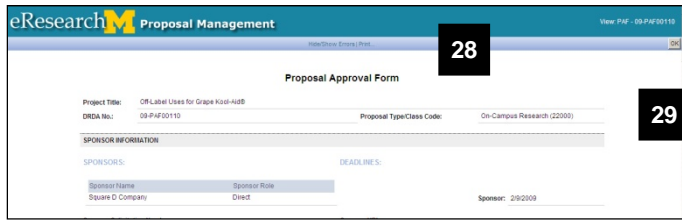
PAF Workspace



- 27. To sign the PAF from the PAF Summary, click **Display PAF Summary** under PAF Summary.



PAF Summary

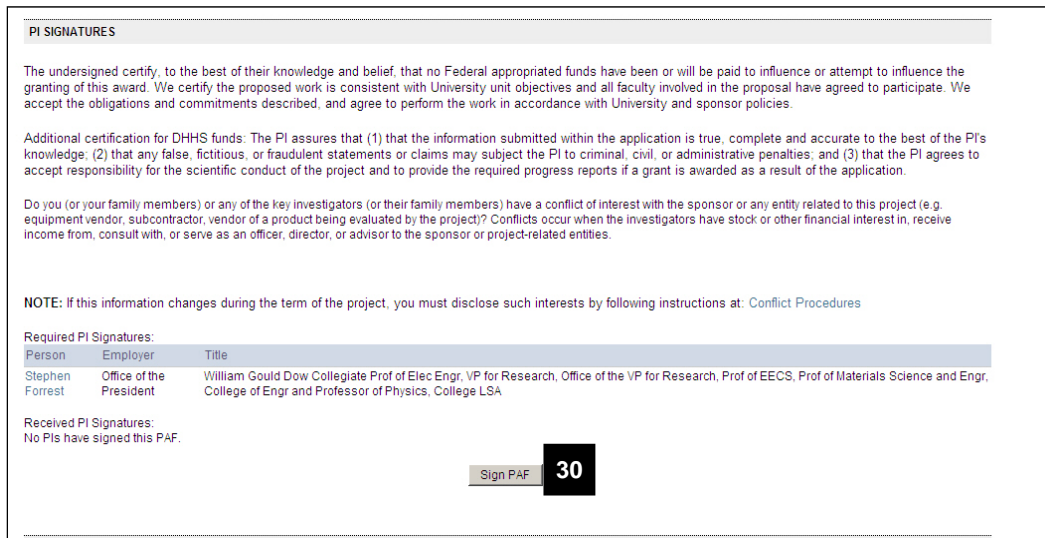


28. The PAF Summary is displayed. It is a printer friendly version of the PAF.

**Note:** The PAF Summary contains:

- All information entered on the PAF worksheet
- All attached/uploaded documents (including supporting documents & final proposal documents)
- PI/Co-I Signatures
- Unit Approval Signatures
- DRDA Approval Signature
- Routing and Submission Information

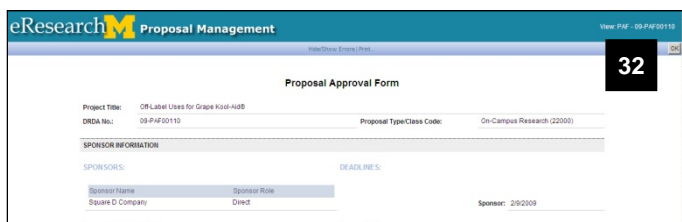
29. Scroll down the page until you find the PI signatures.



30. Click **Sign PAF**.

31. Follow steps 12- 18 above to sign the PAF.

PAF Summary



32. Click **OK** to return to the PAF Workspace.

33. Follow steps 19-25 above to see how you can view that the PAF was signed in the PAF Workspace & Home Workspace.

## Topic 8: Route for Approval

Goal/outcome:

Complete the route for approval activities.

Objectives:

After completing this module, you will be able to:

- Identify that only the UM PI or Primary Research Administrator can route a PAF for approval.
- Route a PAF for approval.
- Understand the Routing Table.
- Identify how a PAF gets to the appropriate Reviewers.
- Discover what to do when a PAF gets “stuck.”

<b>Materials</b>	<b>Page</b>
Create a PAF: Basics - Includes Instructions on How to Route for Approval (step by step procedure)	29
Routed for Unit Review Email (sample email)	111
Understand the Routing Table	30
Discover What To Do When a PAF Gets Stuck	30

## PAF Routed for Unit Review Email

The following is an example of an email notification generated by eRPM to alert the **Primary Research Administrator** and the **UM Principle Investigator** that a PAF has routed for unit review.

The email subject line is "PAF Routed for Unit Review".

### Email Sample

**This is for information only. No action required.**

The PAF referenced below was routed for review and approval.  
You will be notified when further action is required.

#### Comments:

#### PAF Information:

**DRDA Number:** [09-PAF00085](#)

**PAF Title:** Hummingbird Metabolism as a Theoretical Model for Landfill Reduction

**PI:** Stephen Forrest

**Project Administrative Home:** School of Social Work

Primary Research Administrator: Jason Johnson

**Routed for Unit Review & Approval:** 11/14/2008 11:35 AM

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth

**Sponsor Deadline:** 11/20/2008

#### Action Required:

1. Click here to access the PAF: [09-PAF00085](#)

You may be prompted to login using your username and Kerberos password.

2. Click View PAF Summary to review PAF contents and supporting documents.

3. After review of PAF and proposal, click Unit Approve or Reviewer Request Changes.

#### Recipients:

This message was sent to the following:

Jason Johnson  
Stephen Forrest

#### Questions:

1. Refer to [online help](#) for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

<http://www.eresearch.umich.edu/>

## Topic 9: Making Changes to the PAF After Routed

Goal/outcome:

Make & submit changes to PAF worksheet after it is routed for approval and understand the change log and change tracking process.

Objectives:

After completing this module, you will be able to:

- Make and submit changes to the PAF Worksheet as the Project Team/PI.
  - Identify that only the UM PI or Primary Research Administrator can submit changes.
- Track changes made in Recent Activity.
- View change details in change logs.

<b>Materials</b>	<b>Page</b>
PAF Changes (step by step procedure)	113
View Change Details (step by step procedure)	123
Changes Made Email (sample email)	125

## PAF Changes

This procedure details how the PI & Project Team can:

- [Make and submit PAF changes.](#) Page 2
- [Decline requested PAF changes.](#) Page 7
- [Request DRDA Action to make changes.](#) Page 9

### Important Information

- Before a PAF is routed for approval, the PI & Project Team can make changes at will/freely because it is still being prepared. After the PAF is routed for approval, there are processes in place to make and submit changes. These changes are tracked in the eRPM system.
- Although changes are tracked in eResearch, it is REQUIRED to use the comments to summarize the changes made.
- eResearch allows Reviewers to make changes. If a Reviewer is making a change, it locks the PI & Project Team & other departments from making changes. If a Reviewer submits a change, the UM Principal Investigator & Primary Research Administrator will receive an email.
- The PI or Project Team, may need to change a PAF for a variety of reasons. How a PI or Project Team member can make these changes depends on the PAF's State (where it is in the process) & the situation. See table below for when to use the various activities.

Activity	When to Use It	Who Can Use It
Project Team Make Changes	<ul style="list-style-type: none"> <li>• PAF has been routed for unit approval (Unit Review state) and PI &amp; Project wants to make a change(s).</li> </ul>	<ul style="list-style-type: none"> <li>• Anyone with PAF Edit Rights</li> </ul>
Project Team Submit Changes	<ul style="list-style-type: none"> <li>• Need to submit changes made by Project Team.</li> <li>• Need to submit changes that were made per a request for a change from Unit or DRDA.</li> </ul>	<ul style="list-style-type: none"> <li>• Primary Research Administrator or UM PI</li> </ul>
Project Team Decline Changes	<ul style="list-style-type: none"> <li>• Unit or DRDA requested change and PI &amp; Project Team does not agree with requested change.</li> <li>• May also be used to decline post-submission changes.</li> </ul>	<ul style="list-style-type: none"> <li>• Primary Research Administrator or UM PI</li> </ul>
Project Team Request DRDA Action	<ul style="list-style-type: none"> <li>• DRDA Review states – PAF has been approved by all units and is being reviewed by DRDA</li> <li>• Submitted to Sponsor state – Proposal has been reviewed by DRDA &amp; Submitted Sponsor. Sponsor may contact PI to make changes.</li> <li>• Negotiation state – Proposal is in negotiation. Sponsor may contact PI to make changes.</li> <li>• Active – Project is active. Project Team may need to alert DRDA of upcoming award change.</li> </ul>	<ul style="list-style-type: none"> <li>• Anyone with PAF Edit Rights</li> </ul>



**MAKE AND SUBMIT CHANGES**

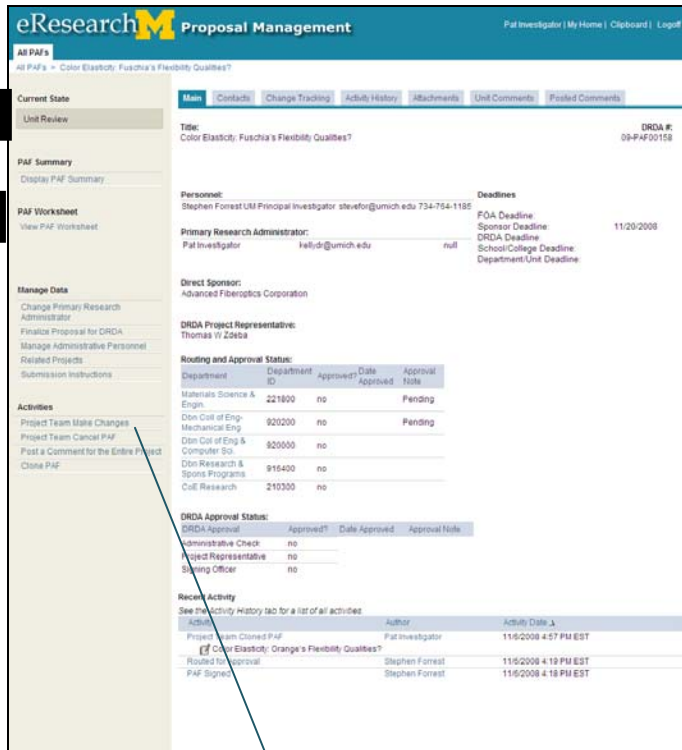
Use this when:

- PAF has been routed for unit approval (Unit Review state) and PI & Project wants to make change(s).
- Received a request for a change from Unit or DRDA and PI & Project needs to make change(s).

When either a Unit or DRDA requests a change:

- UM PI & Primary Research Administrator will receive an email.
- PAF will become editable again.
  - Appears in Home Workspace Inbox in PAFs with Required Action section.
  - Has one of the following states (depending on who requested change):
    - **Unit Review - Project Team Making Changes.**
    - **DRDA Review - Project Team Making Changes.**

**PAF Workspace**

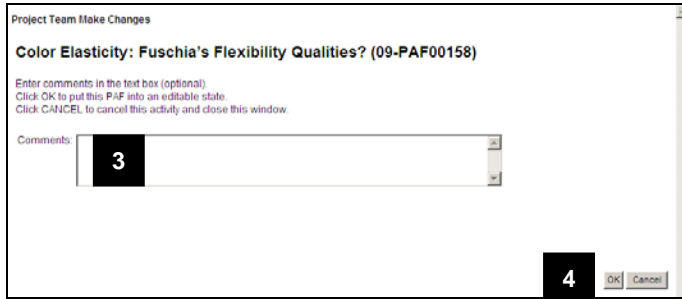


1. If a Unit or DRDA requested changes, skip to step 5.

Notice the PAF is in **Unit Review** and cannot be edited. **View PAF Worksheet** appears instead of Edit PAF Worksheet.

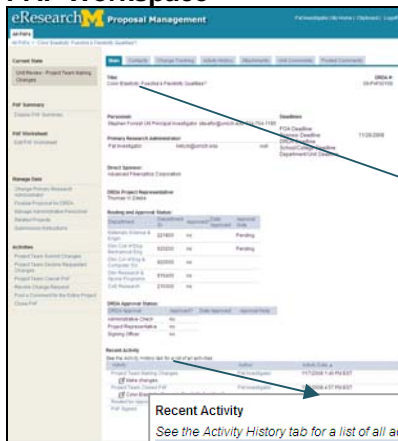
2. Click **Project Team Make Changes** activity from the PAF Workspace.

**Project Team Make Changes Window**



3. Optional, enter **Comments**.
4. Click **OK**.

**PAF Workspace**



5

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

Activity	Author	Activity Date
Project Team Making Changes Make changes.	Pat Investigator	11/7/2008 1:48 PM EST
Project Team Cloned PAF Color Elasticity: Orange's Flexibility Qualities?	Pat Investigator	11/6/2008 4:57 PM EST
Routed for Approval	Stephen Forrest	11/6/2008 4:19 PM EST
PAF Signed	Stephen Forrest	11/6/2008 4:18 PM EST

**Current State**

Unit Review - Project Team Making Changes 6

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**PAF Summary**

[Display PAF Summary](#)

---

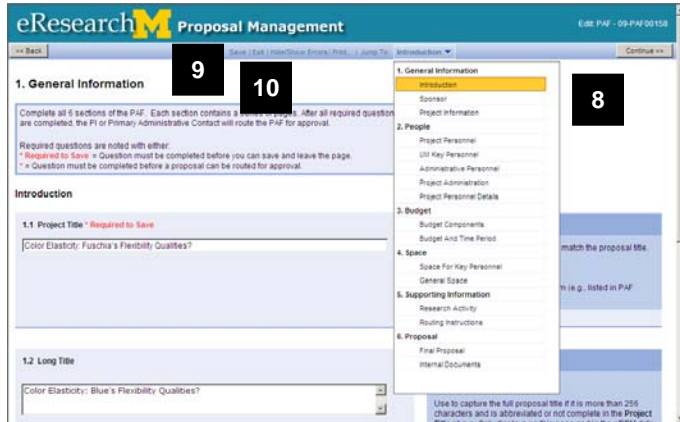
**PAF Worksheet**

[Edit PAF Worksheet](#) 7

5. Notice that **Project Team Making Changes** is logged in the Recent Activity list.
  - Note:** It logs who performed the activity (author) and the activity date time.
  - Note:** If you received a change request from a unit or DRDA, this request would be logged in Recent Activity.
6. Notice that the state of the PAF is **Unit Review – Project Team Making Changes**.
  - Note:** When the state of the PAF is **Unit Review – Project Team Making Changes** it disappears from the inbox of reviewers whose turn it is to review the PAF (Pending) because changes need to be made by the Project Team. If these Reviewers need to view the PAF, they will always be able to see it using All PAFs.

If you received a change request from DRDA the state of the PAF is **DRDA Review – Project Team Making Changes**.
7. Click **Edit PAF Worksheet**, to go and make changes.

**PAF Worksheet**



8. Make the needed changes in the PAF Worksheet.

**Tip:** Use the Jump To list to go directly to the page where you need to make a change.

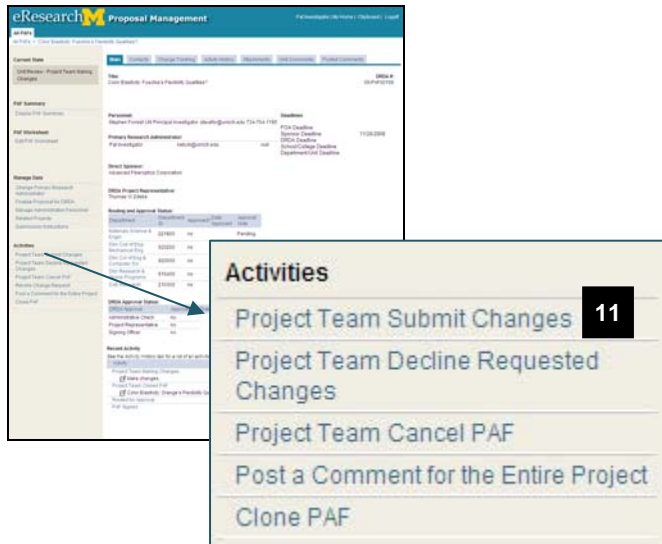
**Note:** Anyone with edit access to the PAF can make changes while it is open for editing.

**Warning!**  
If two people are editing the same page at the same time, the last person to save, SAVES the page. The other person's information is overwritten. Be sure to communicate with your collaborators when making edits.

9. **Save** your changes.

10. Click **Exit** to return to the PAF Workspace.

**PAF Workspace**



11. Click **Project Team Submit Changes** activity from the PAF Workspace.

**Important!**

- Only the UM PI or Primary Research Administrator can submit changes.
- Changes will not be written to the PAF & viewed by Reviewers & DRDA until they are submitted.

### Project Team Submit Changes Window

12. If a department requested a change, the list of departments who are reviewing the PAF appear. Select the department(s) for which you have made changes.

13. Select a **Change Type**.

**Options include:**

- Budget or Budget Justification
- Cost Sharing
- Key Personnel
- Space Resources
- Typos
- Research
- Other
- No Changes Made

**Tips:**

- If you decide that changes are not needed, use **No Changes Made** as the Change Type.
- If you change key personnel, make sure you verify your Administrative Home, Space for Key Personnel, & Project Personnel Details.

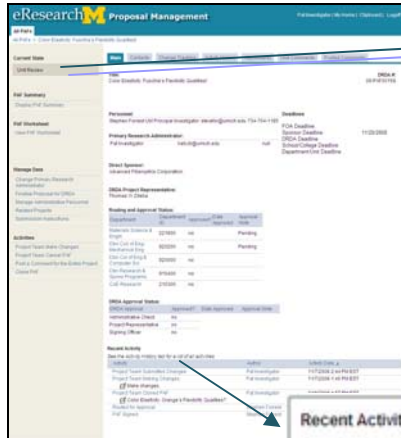
14. **Required**

Enter **Comments** that summarize the change made.

**Note:** The change log tracks all changes made with a line for each page, but it is not convenient for quick review.

15. Click **OK**.

PAF Workspace



**Current State**

Unit Review **17**

---

PAF Summary

[Display PAF Summary](#)

---

PAF Worksheet

[View PAF Worksheet](#) **18**

**16**

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

Activity	Author	Activity Date ↓
Project Team Submitted Changes Changed project title.	Pat Investigator	11/7/2008 2:44 PM EST
Project Team Making Changes Make changes.	Pat Investigator	11/7/2008 1:46 PM EST
Routed for Approval	Stephen Forrest	11/6/2008 4:19 PM EST
PAF Signed	Stephen Forrest	11/6/2008 4:18 PM EST

16. Notice that **Project Team Submitted Changes** is logged in the Recent Activity list.

**Note:** It logs your comment, who performed the activity (author) and the activity date time.

17. Notice that the state of the PAF changed to **Unit Review**.

**Note:** If you received a change request from DRDA the state of the PAF would return to **DRDA Review**.

18. Notice that you cannot edit the PAF. **View PAF Worksheet** appears.

**DECLINE REQUESTED CHANGES**

Only the Primary Research Administrator or UM PI can decline request changes.

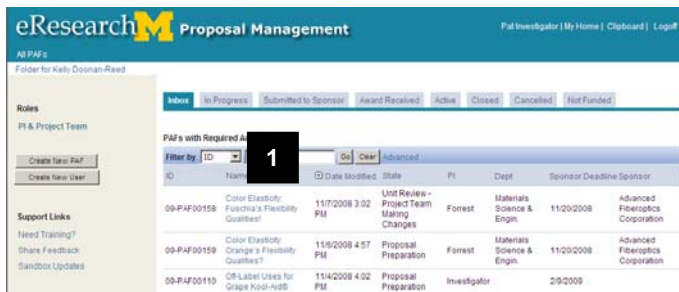
Use this when:

- Unit or DRDA requested change and PI & Project Team does not agree with requested change.
- May also be used to decline post-submission changes.

When either a Unit or the DRDA requests a change:

- PI & Project Team will receive an email.
- PAF will become editable again. Returns to either:
  - **Unit Review - Project Team Making Changes.**
  - **DRDA Review - Project Team Making Changes.**

**PI & Project Team Home Workspace**

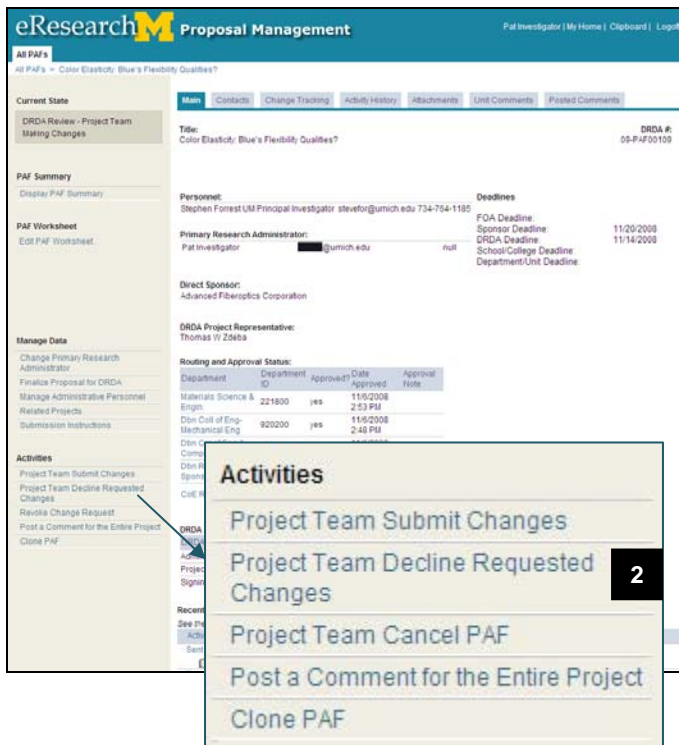


1. Click on the PAF from your Home Workspace.

Note the state of the PAF is either:

- **Unit Review - Project Team Making Changes.**
- **DRDA Review - Project Team Making Changes.**

**PAF Workspace**



2. Click **Project Team Decline Requested Changes** activity from the PAF Workspace.



### Decline Requested Changes activity window

Project Team Decline Requested Changes

You are about to decline a request for an expedited submission of this PAF. Use the text box below to log any comments and the upload area to upload any relevant documents. Click OK to save your changes. Click CANCEL to cancel this activity.

Select the Departments whose requests you are declining.

	ID	Name
<input type="checkbox"/>	230000	Medical School

Comments:

OK Cancel

3. Select the Departments whose requests you are declining.
4. Strongly recommended, enter **Comments** explaining why you are declining to make changes.
5. Click **OK**.

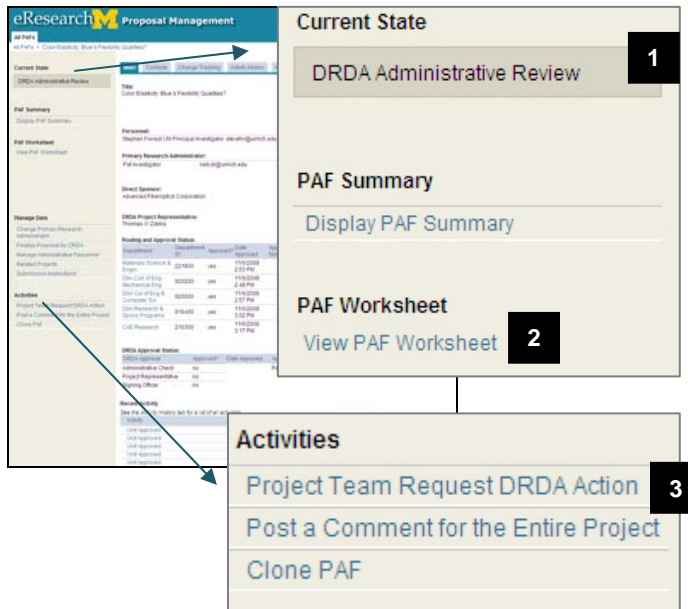
**REQUEST DRDA ACTION**

Anyone with access to edit that PAF can request DRDA Action.

Use this when in the state of:

- DRDA Review – PAF has been approved by all units and is being reviewed by DRDA
- Submitted to Sponsor – Proposal has been reviewed by DRDA & Submitted Sponsor. Sponsor may contact PI to make changes.
- Negotiation – Proposal is in negotiation. Sponsor may contact PI to make changes.
- Active – Project is active. Project Team may need to alert DRDA of upcoming award change.

**PAF Workspace**



The screenshot shows the PAF Workspace interface. Callout 1 points to the 'Current State' dropdown menu, which is currently set to 'DRDA Administrative Review'. Callout 2 points to the 'View PAF Worksheet' link. Callout 3 points to the 'Project Team Request DRDA Action' link in the 'Activities' section.

1. Notice the state of the PAF. It could be:  
**DRDA Review**  
**Submitted to Sponsor**  
**Negotiation**
2. Notice that the PAF cannot be edited.  
**View PAF Worksheet** appears.
3. Click **Project Team Request Changes** activity from PAF Workspace.

### Project Team Request DRDA Action Window

4. Enter **Comments** that explain that you want to:

- Request that DRDA edit the PAF
- Enable the project team to edit the PAF
- Have DRDA cancel the PAF

**Important!**

Do not use this activity to indicate finalization of the proposal document or communicate submission instructions to DRDA.

5. Click **OK**.

**Note:** Requesting to make a change does not automatically allow a project team to make changes (i.e., does not put the PAF into an editable state). The request must be approved by DRDA.

If DRDA approves, you will be able to make changes to the PAF.

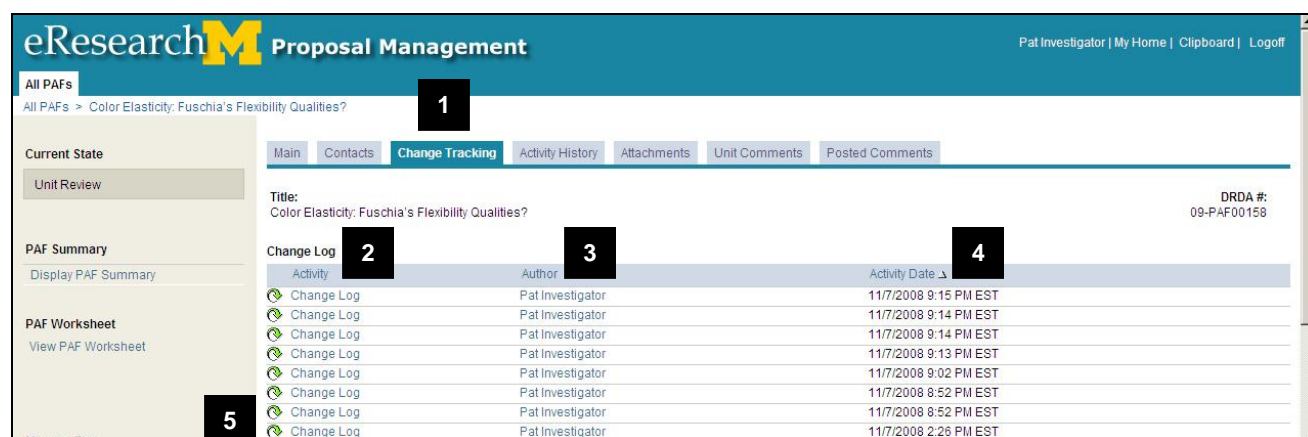
## View Details of Changes

When a change is made to a PAF or its attached documents (in any state except Proposal Preparation), the details of the change are recorded and made available in a change log. A separate change log is created for each change made.

The change log contains:

- Name of person who made the change (change author)
- Content or type of change
- Time and date of change

### PAF Workspace Change Tracking Tab



1. From the PAF Workspace, click on the **Change Tracking** tab.
2. View each change made (**Activity**) in its own change log line.  
**Note:** When making changes, changes made to different pages are logged in different change log lines.
3. View the name of person who made the change (**Author**).
4. View the time and date of change (**Activity Date**).
5. To view the details of a change, click **Change Log**.

Change Log Activity Details and Property Changes Tab

eResearchM Proposal Management
Pat Investigator | My Home | Clipboard | Logoff

8 All PAFs

All PAFs > Color Elasticity: Fuschia's Flexibility Qualities? > Change Log details

**Activity Details (Change Log)** Change Log

Author: Pat Investigator (Regents of the University of Michigan)	Activity Date: 11/7/2008 9:02 PM EST
For Person:	Created Date: 11/7/2008 9:02 PM
Logged For (PAF): Color Elasticity: Fuschia's Flexibility Qualities?	

Property Changes

Documents / Tasks / Notifications

Property	Old Value	New Value
activityType		<span style="font-weight: bold;">7</span> _ProPack_Change Log
author		Pat Investigator
PAF		09-PAF00158
name		Change Log
PAF.General Information.Long Title	Color Elasticity: <del>Blue's Flexibility Qualities?</del>	Color Elasticity: Fuschia Flexibility Qualities?
PAF.General Information.Nickname	Color Elasticity: <del>Blue's Flexibility Qualities?</del>	Color Elasticity: Fuschia Flexibility Qualities?

6. Review the Activity Details (Change Log). Displayed you will see:

- **Author** - name of the person who submitted the change.
- **For Person** – Ignore this field.
- **Logged for (PAF)** - PAF Project Title (as entered in section 1.1 of the PAF worksheet).
- **Activity Date** - time and date that the author submitted the change.

7. To determine the changes made, compare the items in the **Old Value** column against those in the **New Value** column on the **Property Changes** tab.

In the example shown, the **PAF.name** changed from “Color Elasticity: Blue’s Flexibility Qualities?” to “Color Elasticity: Fuschia Flexibility Qualities?”

The use of ~~strike-through text~~ for the previous value and **highlighted text** for the new value provides assistance in identifying the content of the change.

If the change adds a value where none existed previously, the **Old Value** column will be blank and the **New Value** will contain highlighted information.

**Note:** Ignore the **Change Log Documents/Tasks/Notifications** tab.

8. Click the **name of the PAF** in the breadcrumb navigation to return to the PAF Workspace.

## Changes Made Email

The following is an example of an email notification generated by eRPM to alert PAF Email Notification contact persons in the Units who have already submitted approval that changes were made to a PAF.

### Email Sample

**This is for information only. No action required.**

The Project Team has made changes to the PAF referenced below.  
You will be notified if further action is required.

**Comments:**

I've attached the cost share approval

**PAF Information:**

**DRDA Number:** [09-PAF00084](#)

**PAF Title:** Iforsyth\_Mice Metabolism as a Theoretical Model for Landfill Reduction

**PI:** Stephen Forrest

**Project Administrative Home:** 216100 COE EECS - ECE Division

**Primary Research Administrator:** Jason Johnson

**Routed for Unit Review & Approval:** 11/14/2008

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth

**Sponsor Deadline:** 11/20/2008

**Click here to access the PAF:** [09-PAF00084](#)

**Recipients**

This message was sent to the following:

Arnold Approver

**Questions:**

1. Refer to [online help](#) for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

<http://www.eresearch.umich.edu/>



## Topic 10: Manage Data

Goal/outcome:

Make changes to certain data elements without “unlocking” the PAF worksheet.

Objectives:

After completing this module, you will be able to:

- Identify who can perform the various Manage Data activities.
- Update administrative personnel information using Manage Data.
- Update submission instructions.
- Update Primary Research Administrator.
- Understand where to find how to Relate PAFs.
- Understand where to find Finalize Proposal for Submission to Sponsor.

<b>Materials</b>	<b>Page</b>
Manage Data (step by step procedure)	127
Relate PAFs (step by step procedure)	131

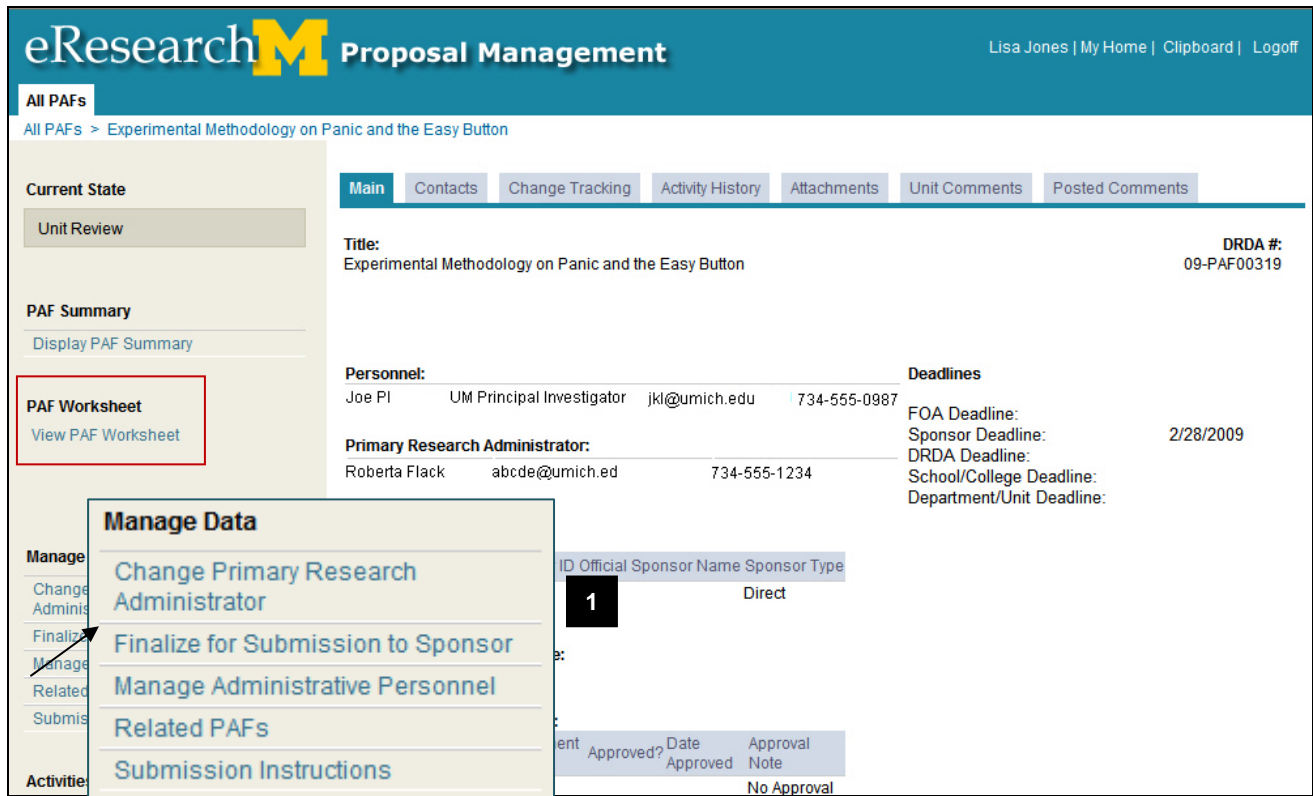
## Manage Data

When a PAF is routed for approval, it is put into a non-editable state. There are certain types of data that can be changed without putting the PAF Worksheet into an editable state & creating change logs using Manage Data.

**Note:** Directions on how to use [Related PAFs](#) & [Finalize for Submission to Sponsor](#) are covered in their own procedures. See the eRPM training page: <http://www.umich.edu/~eresinfo/erpm/training.html>.

Manage Data View	Page
Change Primary Research Administrator	2
Manage Administrative Personnel	3
Submission Instructions	4

### PAF Workspace



The screenshot displays the eResearchM Proposal Management interface. On the left sidebar, the 'Manage Data' option is highlighted. A dropdown menu is open, showing the following options: 'Change Primary Research Administrator', 'Finalize for Submission to Sponsor', 'Manage Administrative Personnel', 'Related PAFs', and 'Submission Instructions'. A black box with the number '1' is positioned over the first option. The main content area shows the PAF details for 'Experimental Methodology on Panic and the Easy Button', including personnel information and deadlines.

1. Click on one of the **Manage Data** views from the PAF Workspace.

Notice that the PAF cannot be edited and the worksheet can only be viewed.

**CHANGE PRIMARY RESEARCH ADMINISTRATOR**

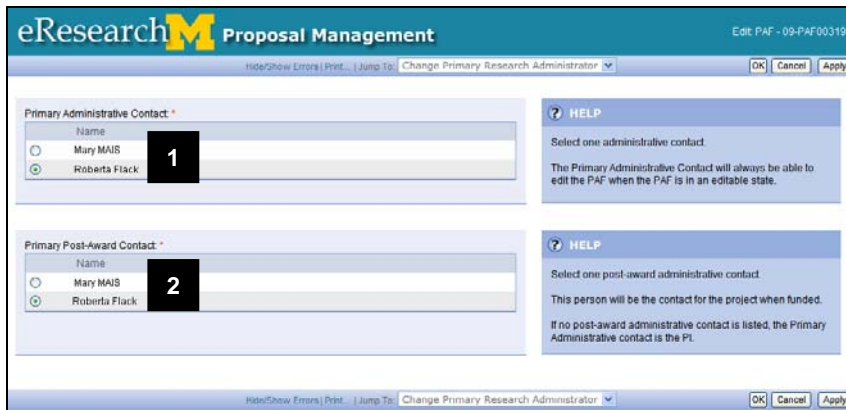
**Who Can Change Primary Research Administrator:** Administrative or Key Personnel who have rights to edit a PAF.

The Primary Research Administrator is initially identified during Proposal Preparation. This person receives email notifications and has the ability to route the PAF for approval. There may be occasions when another person needs to take the role of primary research administrator on the PAF.

Once a PAF has moved into the state of Unit Review, the primary research administrator can be changed to anyone *currently listed* as administrative personnel without making changes to the PAF worksheet.

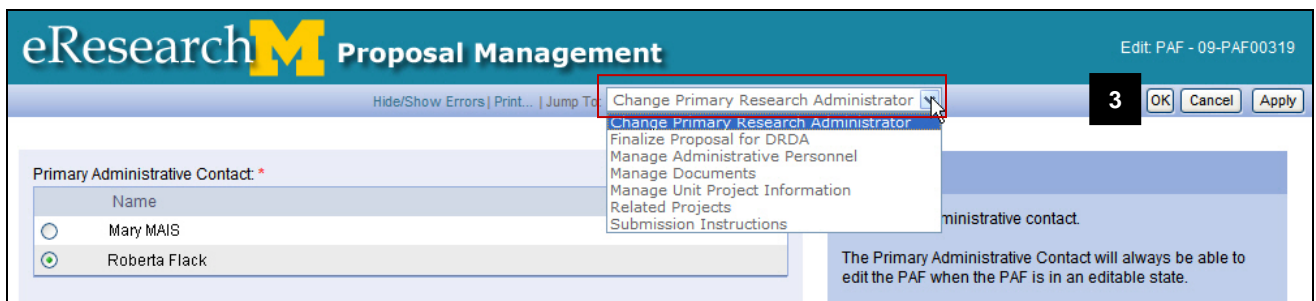
**Note:** You may add additional administrative personnel using the Manage Administrative Personnel procedure on page 4 of this document.

**Change Primary Research Administrator page**



1. **Select** Primary Administrative Contact.
2. **Select** Primary Post-Award Contact.
3. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views



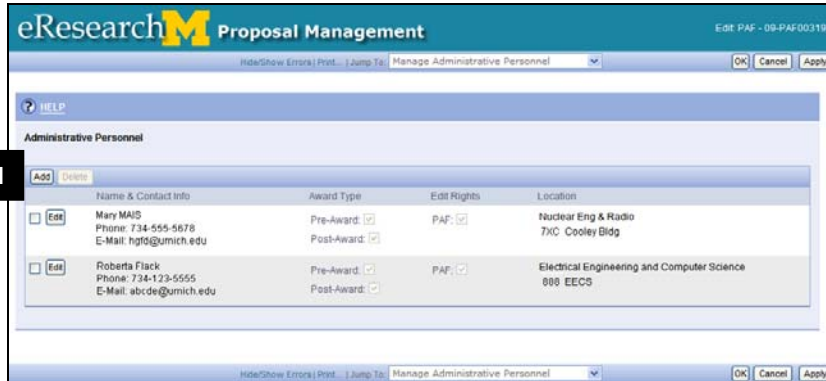
**MANAGE ADMINISTRATIVE PERSONNEL**

**Who Can Manage Administrative Personnel:**

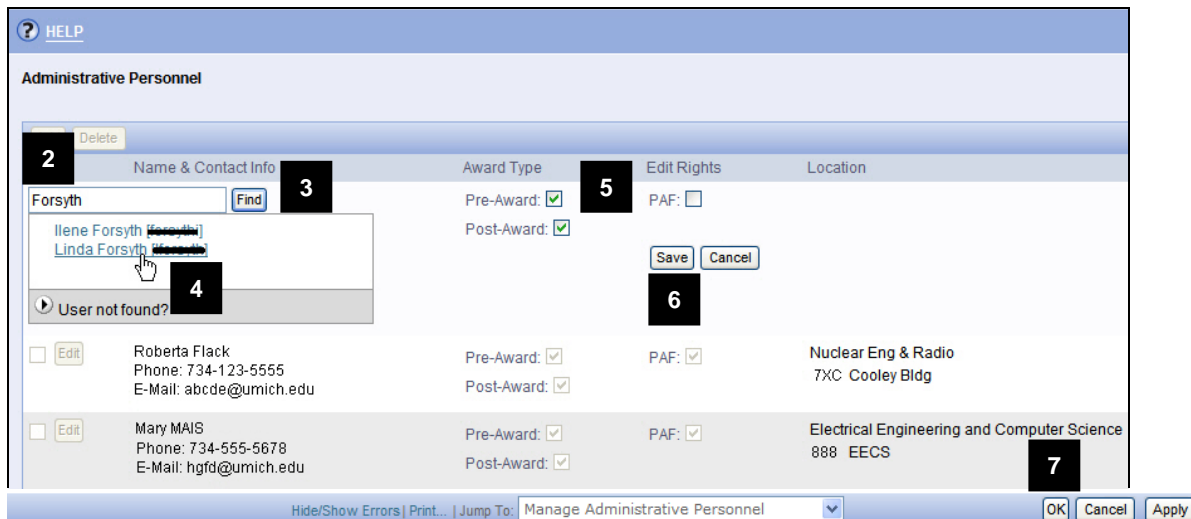
- Administrative or Key Personnel who have rights to edit a PAF
- Reviewers from the PAF's Administrative Home

Administrative Personnel are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, administrative personnel can be added, deleted and edit rights managed without making changes to the PAF worksheet.

**Administrative Personnel page**



1. Click **Add**.



2. Enter last name or unqiname.

3. Click **Find**.

4. Select person from the list.

5. Select **Award Type** and **Edit Rights**.

6. Click **Save**.

7. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views

**SUBMISSION INSTRUCTIONS**

**Who Can Change Submission Instructions:** Primary Research Administrator or UM PI

Submission instructions are initially entered during Proposal Preparation. Once a PAF has moved into the state of Unit Review, submission instructions can be managed without making changes to the PAF worksheet. It is important to keep your submission instructions up to date in order to facilitate a timely submission.

**Submission Instructions**

1. Select all **Proposal Submission** options.
  - This information assists DRDA in processing your proposal.
  - Do not select both **eResearch submission to Grants.gov** & **Adobe Submission to Grants.gov**.
    - **eResearch submission to Grants.gov** is only used when your Grants.gov forms are supported by eResearch
    - **Adobe Submission t Grants.gov** is only used when your Grants.gov forms are NOT supported by eResearch & you must use Adobe to submit to Grants.gov.
2. Update the **Will DRDA Submit this proposal** question.
3. Enter **Notes for DRDA**.
  - Describe your submission method if you select **Other**.
  - Include the proposal delivery/routing contact & contact information (address, fax number, email, etc.).
  - Include any additional information for DRDA, such as:
    - Whether an institutional (cover) letter is required; DRDA Signature is required; DRDA should provide contract
    - Indicate if this project is being proposed under a special program type, e.g. SBIR, STTR, etc.
    - Specify if these notes are award related and not related to final proposal submission to sponsor.
4. Click **OK** to save and return to the PAF Workspace. Clicking **Apply** saves your changes without closing the page.

**Note:** Use the **Jump To** menu to move to other Manage Data views

## Relate PAFs

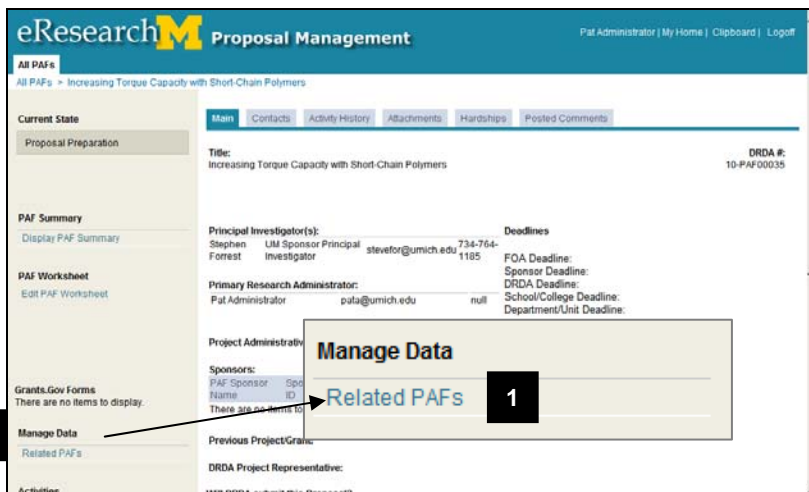
This procedure details how to relate two PAFs together. Before you begin, you need to locate the PAF you want to relate.

**Who Can Relate PAF:** Anyone with the **PI & Project Team** or **Reviewer** role with access to a PAF can relate PAFs.

### Important Information

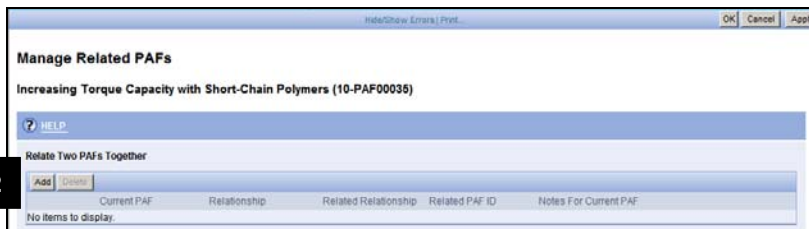
- Relate PAFs in any state.
- Relating PAFs is mainly used for reporting purposed from the eRPM data set.
- View only PAF relationships from eRPM data or specific PAFs.
- Need access to both PAFs to see the relationships from both the original PAF & its related PAF.

### PAF Workspace



1. Click the **Relate PAFs** activity from the **PAF Workspace**.

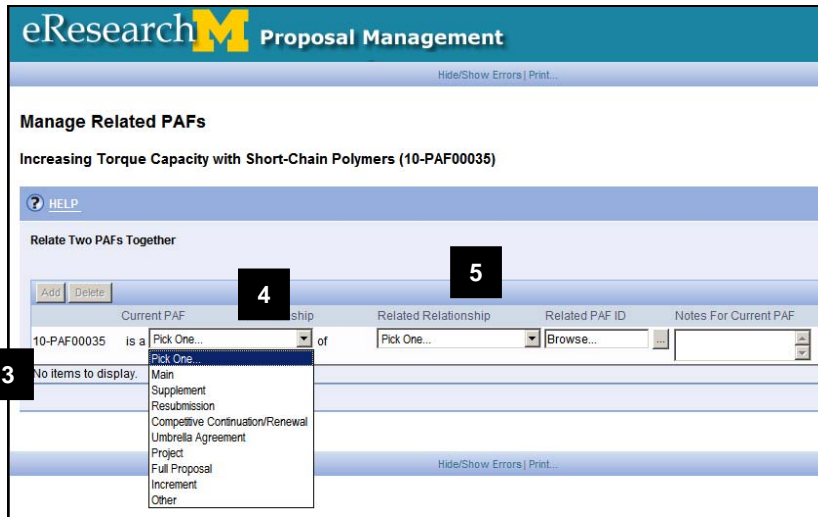
### Manage Related PAFs



2. Click **Add** to relate a PAF to the current PAF selected.



Manage Related PAFs



3. Current PAF number appears.
4. Select **Relationship** for Current PAF.
5. Select **Related Relationship** for PAF you want to relate to the original PAF.

**Important!**

What you can select depends on the Relationship selected for the Current PAF.

Relationship options include:

**Competitive Continuation/ Renewal**

- An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor).
- Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years.
  - o This second application would be considered a Continuation or Renewal.

**Full Proposal**

- An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
- Must be related to a Pre-Proposal PAF.

**Increment**

- An application submitted to sponsor in order to receive continuation of funding.
- This does not undergo a competitive review process from the sponsor but does require a new PAF.

**Main**

- The original PAF that needs another PAF related to it.

**Other**

- Create your own relationship to another PAF.
- In the Notes for Current PAF field, specify the relationship.
- Creates a reciprocal relationship with the other PAF, but does not fill in the "Notes for Current PAF" on the related PAF.

**Pre-Proposal**

- Application submitted to a sponsor that includes a brief summary of the project, personnel, and budget.
- After review, some applicants are invited to submit complete, formal applications.
- Must be related to a Full Proposal PAF.

**Project**

- An application submitted to a sponsor that fits under an Umbrella Agreement.
- Must be related to an Umbrella PAF.

**Resubmission**

- An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application.
- Implies the sponsor made a final decision not to fund the previous version.

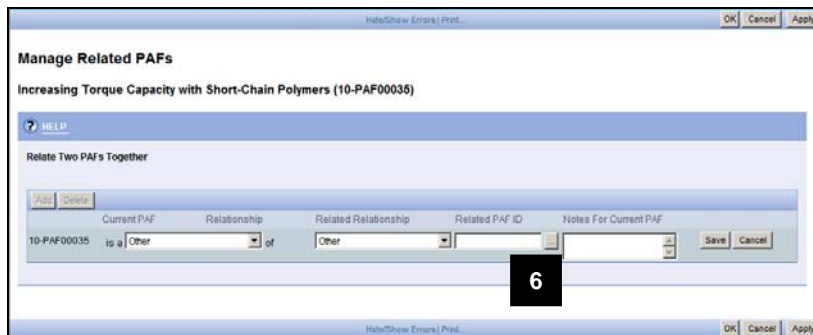
**Supplement**

- An application for additional funding to supplement a currently funded project (same sponsor).
- The request may cover additional work or simply increased costs of the existing project.

**Umbrella Agreement**

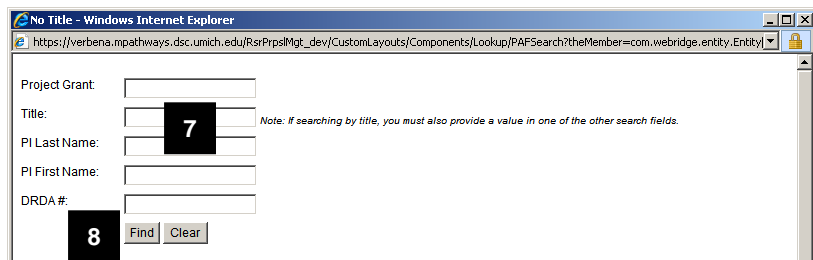
- An application that contains other projects or tasks within it.
- Must be used with a Project PAF.

### Manage Related PAFs

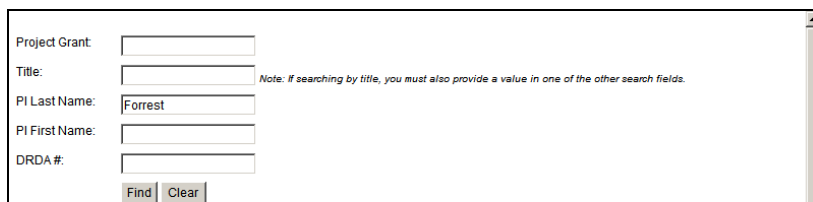


6. Select PAF to relate to.

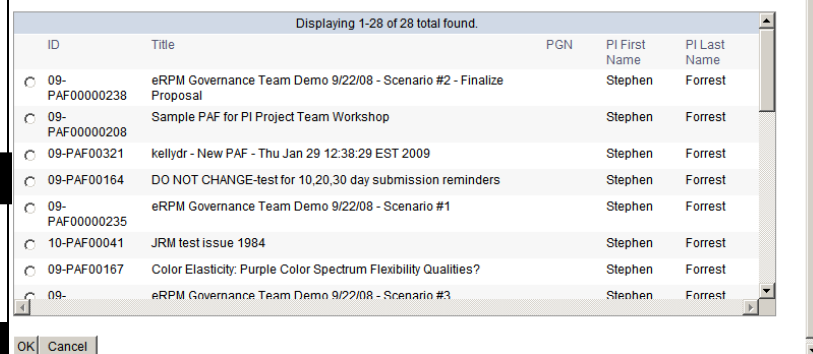
### Find Related PAF Window



7. Enter search criteria to find the PAF to relate to. Options include:  
**Project Grant**  
**Title**  
**PI Last Name**  
**PI First Name**  
and/or  
**DRDA #.**



8. Click **Find**.  
9. Select PAF to relate to.



10. Click **OK** to return to **Manage Related PAFs**.

**Related PAF Window**

- 11. Enter **Notes For Current PAF** if you select **Other** as a relationship.
- 12. Click **Save**.
- 13. Click **OK** to relate the PAFs together.

14. You can view the related PAF information from either the original PAF or the related to PAF. Click on Related PAFs from the PAF Workspace. This information is sent to the eRPM data set also.

Current PAF	Relationship	Related Relationship
10-PAF00035	is a Other of	UNDEFINED

**Topic 11: Finalizing the Proposal**

Goal/outcome:

Learn how to upload the final proposal documents and understand the importance of this function.

Objectives:

After completing this module, you will be able to:

- Articulate the importance of uploading 1 PDF as the final proposal document for submission to the sponsor.
- Complete steps to finalize the proposal for DRDA, when Submission method is:
  - **Adobe submission to Grants.gov**
  - **Email to Sponsor**
  - **Commercial Courier to Sponsor (FedEx, UPS, etc.)**
  - **US Mail to Sponsor**
  - **Fax to Sponsor**
  - **Other**
- Complete steps to finalize the proposal for DRDA, when Submission method is **eResearch submission to Grants.gov**
  - Understand that one select submission method **eResearch submission to Grants.gov** will check the status of Grants.gov forms in eResearch when finalizing.
  - Understand that Grants.gov forms in eRPM must be validated prior to finalization.
  - Understand that if Grants.gov forms are not supported in eResearch do not select **eResearch submission to Grants.gov** as a submission method because it will prevent finalization. Your submission method should be **Adobe submission to Grants.gov**.
- Complete steps to finalize the proposal for DRDA, when Submission method is **Other Online System (e.g. Fastlane, proposalCENTRAL)**
- Identify next steps when PAF is in the State **DRDA Approved – Awaiting Finalization**
- Identify that DRDA cannot submit a proposal until it has been finalized.

<b>Materials</b>	<b>Page</b>
Finalize Proposal for Submission to Sponsor Overview (PowerPoint)	136
Finalize Proposal for Submission to Sponsor (step by step procedure)	143

## eResearch **M** Finalize Proposal in eRPM

- The business practice allows a PI to complete his/her proposal while the PAF is being routed for approval.
- Steps have been included in eRPM to accommodate this process.
- PAF can still be routed concurrent with or before the proposal completion process.
- Finalize proposal steps are designed to make it clear:
  - When the proposal document is finalized and ready for submission.
  - Who is expected to submit the proposal.
  - A common location for the final proposal document.

Last updated: 8/25/2009 1

## eResearch **M** Submission Methods & Uploading Final Proposal Documents

- Submission Methods are indicated on the PAF Worksheet & can be changed using **Submission Methods** activity.
- The process for uploading final proposal documents is impacted by the Submission Method selected. Methods include:
  - eResearch submission to Grants.gov
  - Adobe submission to Grants.gov
  - Email to Sponsor
  - Other Online System (e.g. Fastlane, proposalCENTRAL)
  - Commercial Courier to Sponsor (FedEx, UPS, etc.)
  - US Mail to Sponsor
  - Fax to Sponsor
  - Other

5.16 Submission Methods \*

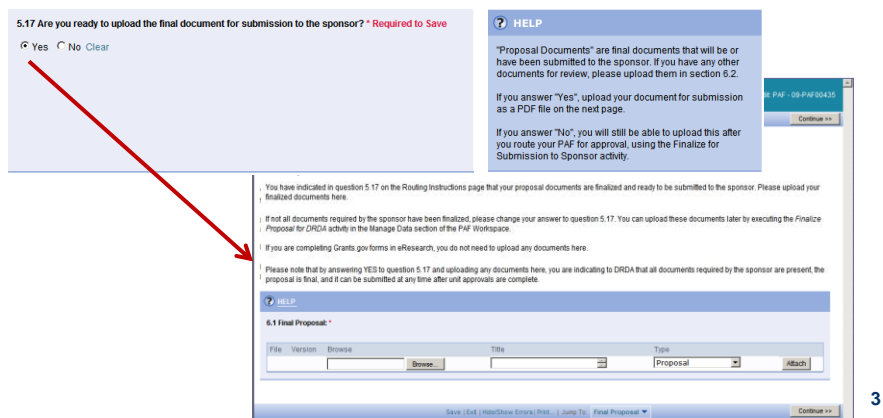
How will the proposal document be submitted from the university to the direct sponsor?  
(select all that apply)

- eResearch submission to Grants.gov
- Adobe submission to Grants.gov
- Email to Sponsor
- Other Online System (e.g. Fastlane, proposalCENTRAL)
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

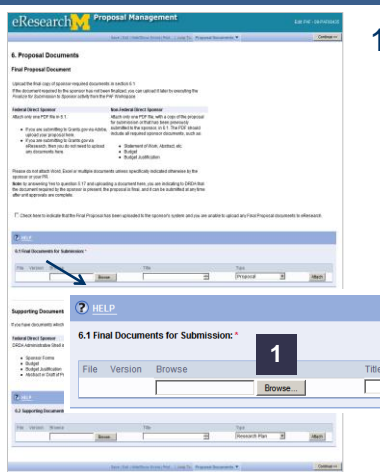
Last updated: 8/25/2009 2

## eResearchM Upload Final Proposal Documents – PAF Worksheet

- **PAF Worksheet** - PI/Project Team can indicate that the final proposal document is ready when completing the PAF.
  - Answer Yes to question 5.17 & complete **6.1 Final Documents for Submission** on the **Proposal Documents** page.



## eResearchM Upload Final Proposal Documents – PAF Worksheet (cont)



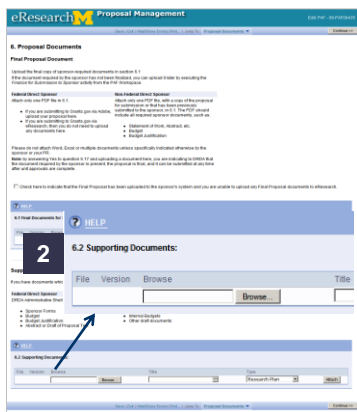
1. In **6.1 Final Documents for Submission**, attach **1 PDF** of **FINAL** sponsor-required documents.
  - For Non-Federal Direct Sponsor, the PDF should include:
    - Statement of Work/Abstract
    - Budget
    - Budget Justification
  - For Federal Direct Sponsor, attach 1 PDF.
    - Grants.gov via Adobe - Attach 1 PDF.
    - Grants.Gov in eResearch, do not attach a document, but the Grants.gov application must be validated.
- **Important!** Do NOT upload internal review documents in 6.1.

Last updated: 8/25/2009 4



## eResearchM Finalize – PAF Worksheet (cont)

2. Attach documents needed for UM Internal Review (Unit & DRDA Review) in 6.2 Supporting Documents.

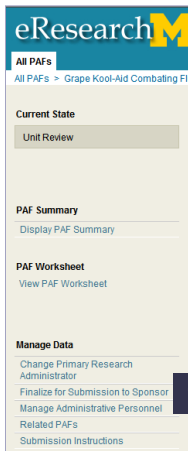


- For a Federal Direct Sponsor, attach DRDA Administrative Shell which includes:
  - Sponsor Forms
  - Budget
  - Budget Justification
  - Abstract or Draft of Proposal Text
- For Non-Federal Direct Sponsor, attach Draft Contract, Internal Budgets, Other draft documents
- **Important!** Do NOT upload the Final Proposal documents here.

Last updated: 8/25/2009 5

## eResearchM Finalize for Submission to Sponsor

**Finalize for Submission for Sponsor** activity is used by PI/Project Team to finalize after the PAF routed is for approval.



Steps cover finalization for the following Submission Methods:

- Adobe submission to Grants.gov
- Email to Sponsor
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

1. Click **Finalize for Submission to Sponsor** activity.

Last updated: 8/25/2009 6

## eResearchM Finalize for Submission to Sponsor (cont)

2. Indicate that the proposal document is final & ready to be submitted to the sponsor.

**2**

eResearchM Proposal Management

Hide>Show Errors | Prev... | Jump To: Finalize for Submission to Sponsor | OK | Cancel | Apply

Edt: PAF - 09-PAF00570

**Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)**

Attach only one PDF file.

- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants gov forms (if applicable) are complete, validated, and ready for submission.  
(How do I know my Grants gov forms are complete and valid?)

**Federal Direct Sponsor**  
Attach only one PDF file in 6.1

- If you are submitting to Grants.gov via Adobe, upload your proposal here.

**Non-Federal Direct Sponsor**  
Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.1. The PDF should include all required sponsor documents, such as:

- Statement of Work, Abstract, etc.
- Budget
- Budget Justification

**HELP**

Final Documents for Submission:

File	Version	Browse	Title	Type	Attach	
Delete	Final_Proposal.pdf	0.01	Browse	Final Proposal Document	Proposal	Attach

2009 7

## eResearchM Finalize for Submission to Sponsor (cont)

3. Upload **1 PDF** for submission to the sponsor.

**For Federal Direct Sponsor:**

- Attach 1 PDF.
- Attach 1 PDF for **Grants.gov** via **Adobe** submission.
- No need to attach PDF for Grants.gov via eResearch.

**For Non-Federal Direct Sponsor:**

- Attach 1 PDF that includes:
- Statement of Work, Abstract, etc.
  - Budget
  - Budget Justification

4. Click OK.

**4**

eResearchM Proposal Management

Hide>Show Errors | Prev... | Jump To: Finalize for Submission to Sponsor | OK | Cancel | Apply

Edt: PAF - 09-PAF00570

**Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)**

Attach only one PDF file.

- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants gov forms (if applicable) are complete, validated, and ready for submission.  
(How do I know my Grants gov forms are complete and valid?)

**Federal Direct Sponsor**  
Attach only one PDF file in 6.1

- If you are submitting to Grants.gov via Adobe, upload your proposal here.

**Non-Federal Direct Sponsor**  
Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.1. The PDF should include all required sponsor documents, such as:

- Statement of Work, Abstract, etc.
- Budget
- Budget Justification

**HELP**

Final Documents for Submission:

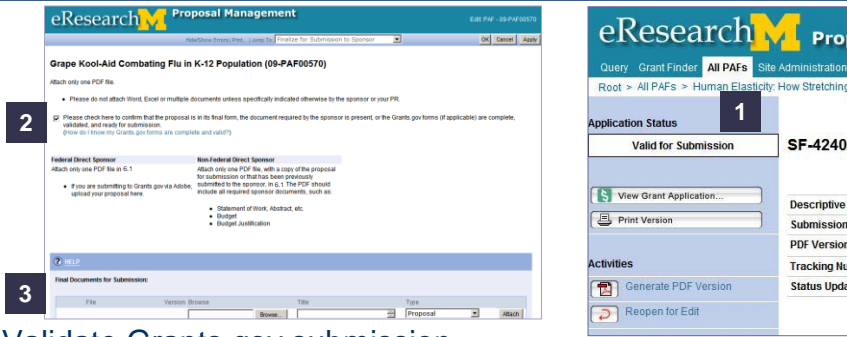
File	Version	Browse	Title	Type	Attach	
Delete	Final_Proposal.pdf	0.01	Browse	Final Proposal Document	Proposal	Attach

**3**

**! Do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.**

**! Make sure to click Attach.**

## eResearchM Grants.gov via eResearch - Method

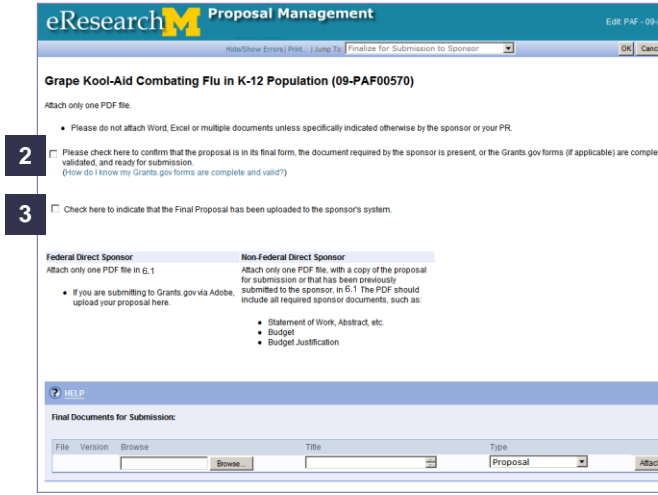


1. Validate Grants.gov submission
  - Application Status = **“Valid for Submission”**
  - Directions: [http://www.umich.edu/~eresinfo/erpm/docs/PM\\_GrantsGov.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_GrantsGov.pdf)
2. Finalize for Submission to Sponsor.
3. No need to upload a PDF in 6.1 Final Documents for Submission.
  - An error will occur if the Grants.gov application is not valid for submission.

Last updated: 8/25/2009 9

## eResearchM Online System (e.g. Fastlane...) - Method

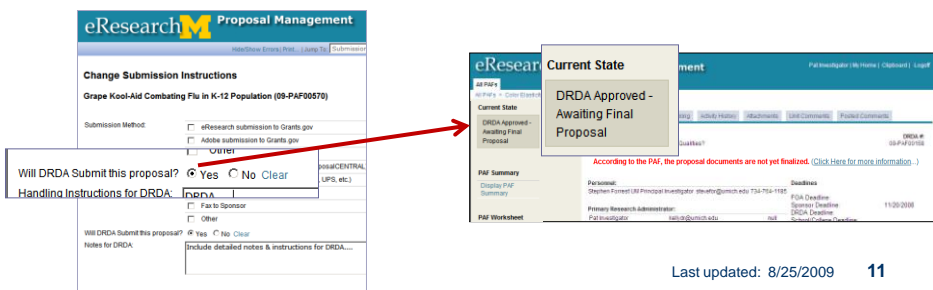
1. Complete the proposal on the sponsor system.
2. Finalize for Submission to Sponsor.
3. Indicate that the proposal has been uploaded to sponsor system.



Last updated: 8/25/2009 10

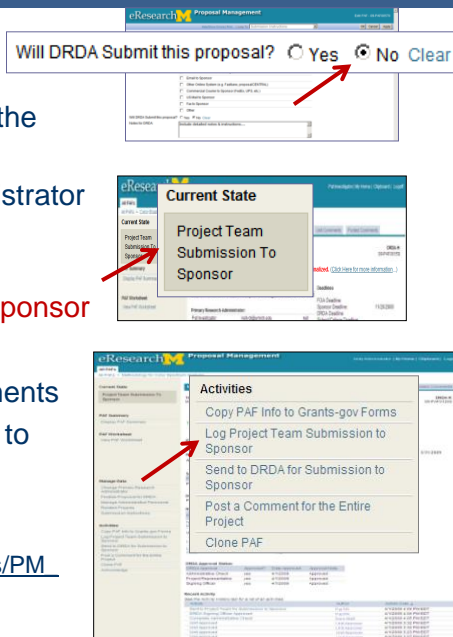
## eResearchM DRDA Approved: Awaiting Final Proposal

- DRDA completes PAF Review
- Submission Instructions indicate that **DRDA will submit the proposal**
- If the proposal documents are not finalized
  - DRDA will send the PAF back to the PI & Project Team for proposal finalization
    - PI & Primary Research Administrator will receive an email
  - The PAF will be in the state: **DRDA Approved: Awaiting Final Proposal**



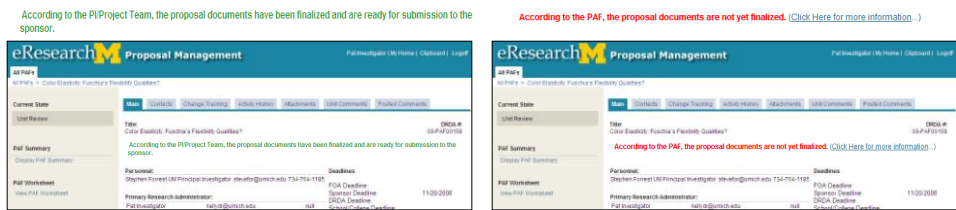
## eResearchM Project Team Submission to Sponsor

- DRDA completes PAF Review
- Submission instructions indicate that the Project Team will submit the proposal, DRDA sends to:
  - PI & Primary Research Administrator (sent an email)
  - The PAF will be in the state: **Project Team Submission to Sponsor**
- PI & Project Team must:
  - Must Finalize Proposal Documents
  - Log Project Team Submission to Sponsor
- Directions:
  - [http://www.umich.edu/~eresinfo/erpm/docs/PM\\_PT\\_LogSubmission\\_SS.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf)



## eResearchM Home Workspace Indicates If Finalized

- **Proposal document** must be finalized before:
  - DRDA can submit to sponsor
  - or
  - Project Team Can Log Sponsor Submission
- After a PAF is routed for approval, a message on the PAF workspace indicates if:
  - is Finalized
  - or
  - is Not Finalized



Last updated: 8/25/2009 13

## eResearchM Finalize Proposal More Info

- Need more detailed directions?
- See:
  - [http://www.umich.edu/~eresinfo/erpm/docs/PM\\_PT\\_Finalize.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_Finalize.pdf)

Last updated: 8/25/2009 14

**Finalize for Submission to Sponsor**

This document explains how to finalize for submission to sponsor in eResearch Proposal Management.

- The business practice allows a PI to complete his/her proposal while the PAF is being routed for approval.
- The proposal does not have to be finalized before the PAF is routed for review & approval.
- PAF can still be routed concurrent with or before the proposal completion process.
- Finalize proposal steps are designed to make it clear:
  - When the proposal document is finalized and ready for submission.
  - Who is expected to submit the final proposal document.
  - A common location for the final proposal document (sponsor required documents).

**Who Can Finalize:** Key & Administrative Personnel with edit rights can finalize for submission to sponsor.

**Important Information**



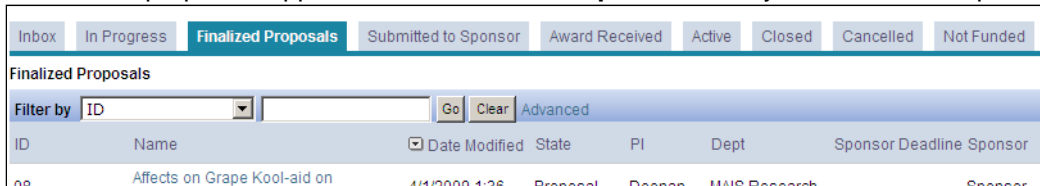
DRDA will not submit a proposal to a Sponsor until it has been finalized.



If the project team is submitting the proposal, the project team cannot log project submission until the proposal is finalized for the sponsor.



All finalized proposals appear in the **Finalized Proposals** tab of your Home Workspace.



Steps to finalize depend on:

- Who will submit the proposal
  - DRDA
  - PI/Project Team
- How the proposal will be submitted
  - All methods except Grants.gov using eResearch
  - Grants.gov using eResearch
  - Online System (e.g. Fastlane, proposalCentral)

**When can you finalize the proposal?**

- After the PAF has been routed for approval, you can finalize at any time using the **Finalize Proposal for Submission to Sponsor** Manage Data activity.
- If you have the final proposal, you can finalize when initially completing the PAF worksheet.

**Topics:**

- [Submission Instructions](#) Page 2
- Finalization Scenarios
  - [Proposal Not Final When Completing PAF Worksheet](#) Page 3
  - [Finalize Proposal for Submission to Sponsor - After PAF Routed for Approval](#) Page 4
    - [DRDA Will Submit Method Not Grants.gov using eResearch](#) Page 5
    - [DRDA Will Submit Method Grants.gov using eResearch](#) Page 8
    - [PI/Project Team Will Submit](#) Page 11
    - [Submission Method Electronically via Other Online System](#) Page 14
  - [Proposal Final When Completing PAF Worksheet](#) Page 15

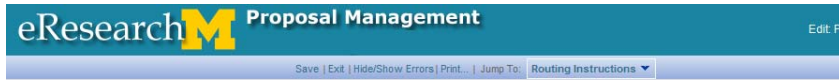


**Submissions Instructions**

Who will submit the proposal (DRDA or PI/Project Team) & how the proposal will be submitted impacts how you will finalize your proposal.

Submission instructions are first completed in the PAF Worksheet & can be maintained after the PAF is routed for review & approval.

**PAF Worksheet Section 5. Supporting Information – Routing Instructions**



**5. Supporting Information**

**Routing Instructions**

**5.14 Deadlines**

FOA Deadline: 6/30/2009  
 Sponsor Deadline:  
 DRDA Deadline:  
 School/College Deadline:  
 Department/Unit Deadline:

**HELP**  
 If any of these deadlines need to be changed, refer to the Sponsor section using the **Jump To** menu.

**1** **5.15 Will DRDA submit any proposal documents to the sponsor?**

Yes  No

**HELP**  
 If yes, include detailed instructions in 5.18 Notes

**2** **5.16 Submission Methods \***

How will the proposal document be submitted from the university to the direct sponsor? (select all that apply)

eResearch submission to Grants.gov  
 Adobe submission to Grants.gov  
 Email to Sponsor  
 Other Online System (e.g. Fastlane, proposalCENTRAL)  
 Commercial Courier to Sponsor (FedEx, UPS, etc.)  
 US Mail to Sponsor  
 Fax to Sponsor  
 Other

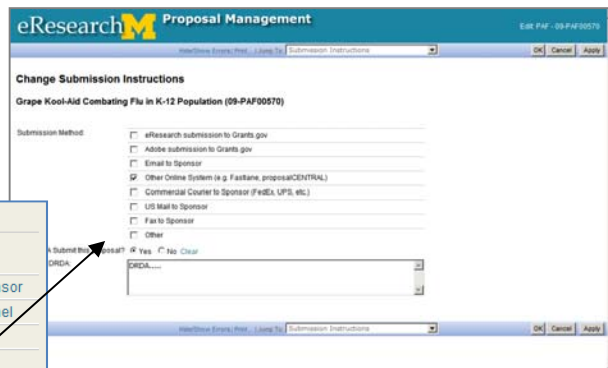
**HELP**  
 This information assists DRDA in processing your proposal.  
 If you select Other, describe your submission method in 5.18 Notes for DRDA.

1. Answer question **5.15 Will DRDA submit any proposal documents to the sponsor?**

Yes = DRDA will submit proposal to sponsor

No = PI/Project Team will submit proposal to sponsor.

2. Select all methods that will be used to submit your Proposal.



**Note:**  
 After you route the PAF for approval, Submission Instructions can be managed & changed using **Submission Instructions** under the **Manage Data** menu on the PAF Workspace.

Proposal Not Final When Completing PAF Worksheet

PAF Worksheet - Section 5. Supporting Information – Routing Instructions



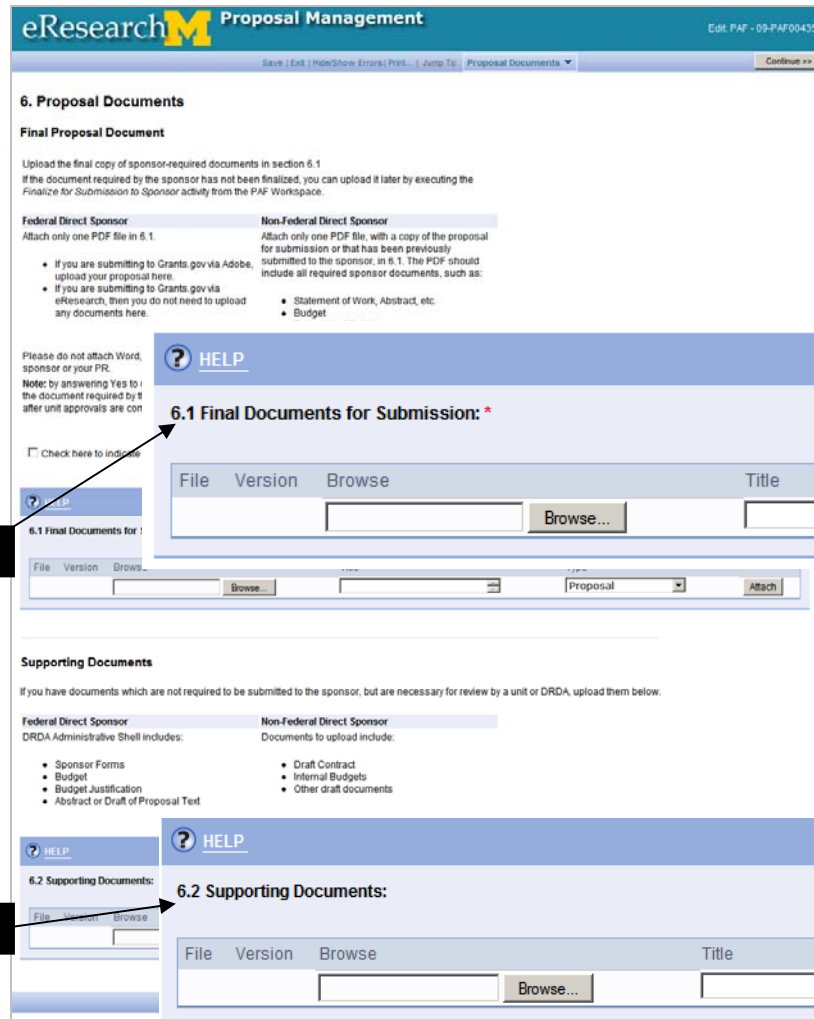
5.17 Are you ready to upload the final document for submission to the sponsor? \* Required to Save

Yes  No Clear



1. If your proposal is not finalized when you are completing the PAF, Select **No** for question 5.17 **Are you ready to upload the final document for submission to the sponsor?**

Proposal Documents



2. Do NOT attach sponsor-required documents in 6.1 **Final Documents for Submission** because your final proposal document is NOT complete & ready to be submitted to the sponsor.
3. Attach documents needed for UM Internal Review (Unit & DRDA Review) in **6.2 Supporting Documents**.

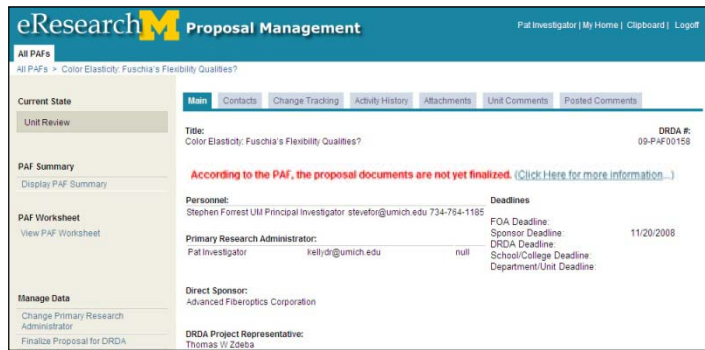
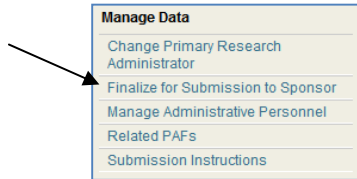
**Important!** Do NOT upload the Final Proposal documents here.

- For a **Federal Direct Sponsor** attach DRDA Administrative Shell which includes:
    - Sponsor Forms
    - Budget
    - Budget Justification
    - Abstract or Draft of Proposal Text
  - For **Non-Federal Direct Sponsor** attach:
    - Draft Contract
    - Internal Budgets
    - Other draft documents The Administrative Shell is not submitted to the sponsor.
4. Complete the steps to route the PAF for approval. The proposal does not have to be finalized before you route for approval.

**Finalize for Submission to Sponsor - After PAF Routed for Approval**

Use the **Finalize for Submission to Sponsor** Manage Data activity to finalize the proposal after the PAF has been routed for approval.

- Your PAF could be in the Unit Review state or any of the DRDA states.



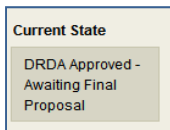
If you have not finalized your proposal and all DRDA Approvals have occurred, what happens next depends on your submission instructions.

- If the submission instructions indicate that **PI & Project Team** will submit the proposal:
  - DRDA will send PAF back to the PI & Project Team for proposal submission to sponsor
  - PI & Primary Research Administrator will receive an email
  - The proposal must be finalized before the submission can be logged.



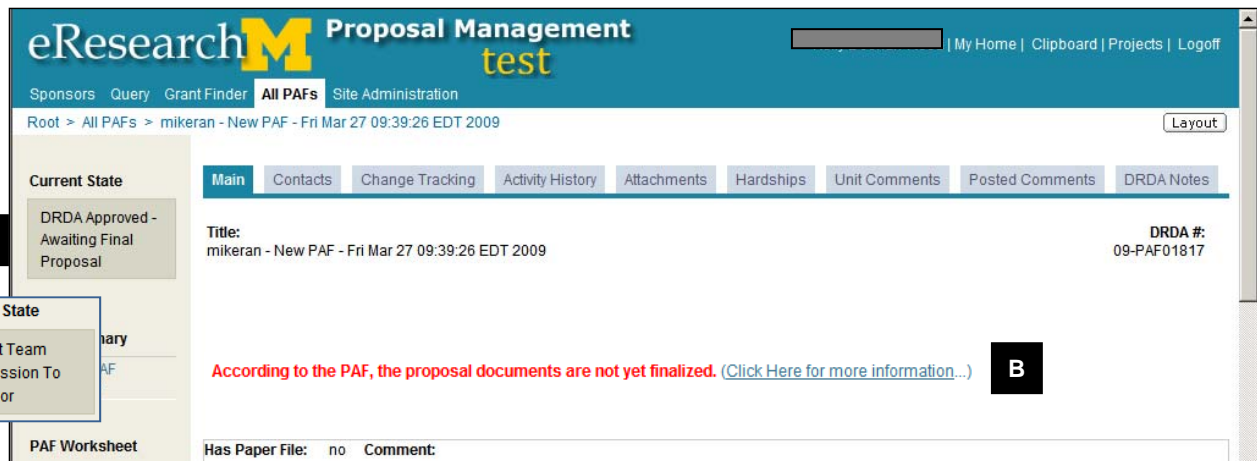
**A** The PAF will be in the state:  
**Project Team Submission to Sponsor**

- If the submission Instructions indicate that **DRDA** will submit the proposal
  - DRDA will send the PAF back to the PI & Project Team for proposal finalization
  - PI & Primary Research Administrator will receive an email



**A** The PAF will be in the state:  
**DRDA Approved: Awaiting Final Proposal**

**B** Regardless of who will submit to the sponsor if the proposal is not finalized, **“According to the PAF, the proposal documents are not yet finalized.”** appears on the PAF Workspace.



DRDA will not submit a proposal to a Sponsor until it has been finalized.



If the project team is submitting the proposal, the project team cannot log project submission until it is finalized.

**DRDA Will Submit & Method Not Grants.gov using eResearch**

This section explains the steps to finalize when DRDA will submit & the method is not Grants.gov using eResearch.

Methods could include:

- Adobe submission to Grants.gov
- Email to Sponsor
- Other Online System
- Commercial Courier
- Fax to Sponsor
- Other

**PAF Workspace: Unit Review state**

**Note:** Steps to finalize shown using the **Finalize Submission for Sponsor Manage Data** activity. Could also finalize from PAF Worksheet.

1. Click **Finalize for Submission to Sponsor** under the Manage Data menu.

Finalize for Submission to Sponsor

**2**  Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.  
(How do I know my Grants.gov forms are complete and valid?)

**4**

**Federal Direct Sponsor**  
Attach only one PDF file in 6.2.

- If you are submitting to Grants.gov via Adobe, upload your proposal here.

**Non-Federal Direct Sponsor**  
Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.2. The PDF should include all required sponsor documents, such as:

- Statement of Work, Abstract, etc.
- Budget
- Budget Justification

**3**

File	Version	Browse	Title	Type
Delete Final_Proposal.pdf	0.01	Browse...	Final Proposal Document	Proposal Attach

2. Indicate for DRDA that the proposal is final & ready to be submitted.

**Note:** Selecting the box means that YES the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.

This check box changes the answer to question 5.17 **Are you ready to upload the final document for submission to the sponsor?** to **Yes** in the PAF worksheet.

3. Upload 1 PDF proposal document for submission to the sponsor, it should include all required sponsor documents, such as:

**Notes:**

- For Non-Federal Direct Sponsor, the PDF should include Statement of Work, Abstract, etc.; Budget; Budget Justification
- For Federal Direct Sponsor, attach 1 PDF. Attach 1 PDF if you submit to Grants.gov via Adobe.

**Important!** Do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

**Warning!** Make sure to click Attach.

4. Click **OK**.  
Proposal is finalized & ready for submission to the sponsor.



**PAF Workspace: Unit Review State**

The screenshot shows the 'eResearch Proposal Management' interface. The top navigation bar includes 'Pat Investigator | My Home | Clipboard | Logout'. The main content area displays the title 'Color Elasticity: Fuschia's Flexibility Qualities?' and a message: 'According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor.' Below this, there are sections for 'Personnel' (listing Stephen Forrest as the Principal Investigator) and 'Deadlines' (listing a Sponsor Deadline of 11/20/2008). A sidebar on the left contains a 'Current State' section with 'Unit Review' selected, and 'PAF Summary' and 'PAF Worksheet' sections. A black box with the number '5' is overlaid on the 'PAF Summary' section.

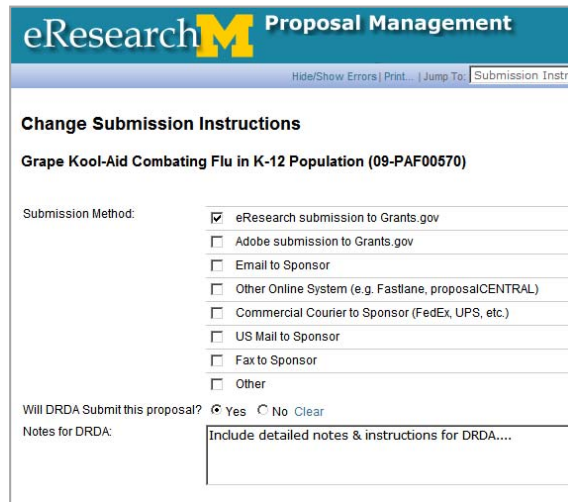
- 5. Message appears on the PAF Workspace that the Proposal is finalized & ready for submission to the sponsor.

After all reviews are complete this proposal can be submitted to the sponsor.

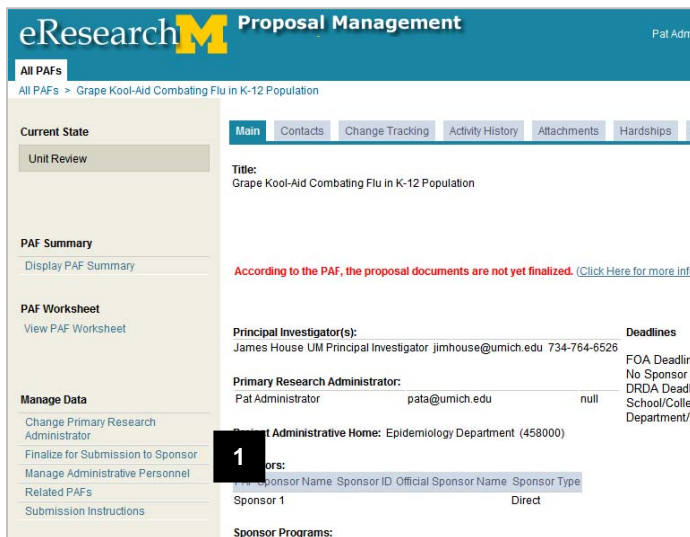


**DRDA Will Submit Electronically via Grants.gov using eResearch**

This section explains the steps to finalize when DRDA will submit & the method is eResearch Submission to Grants.gov.



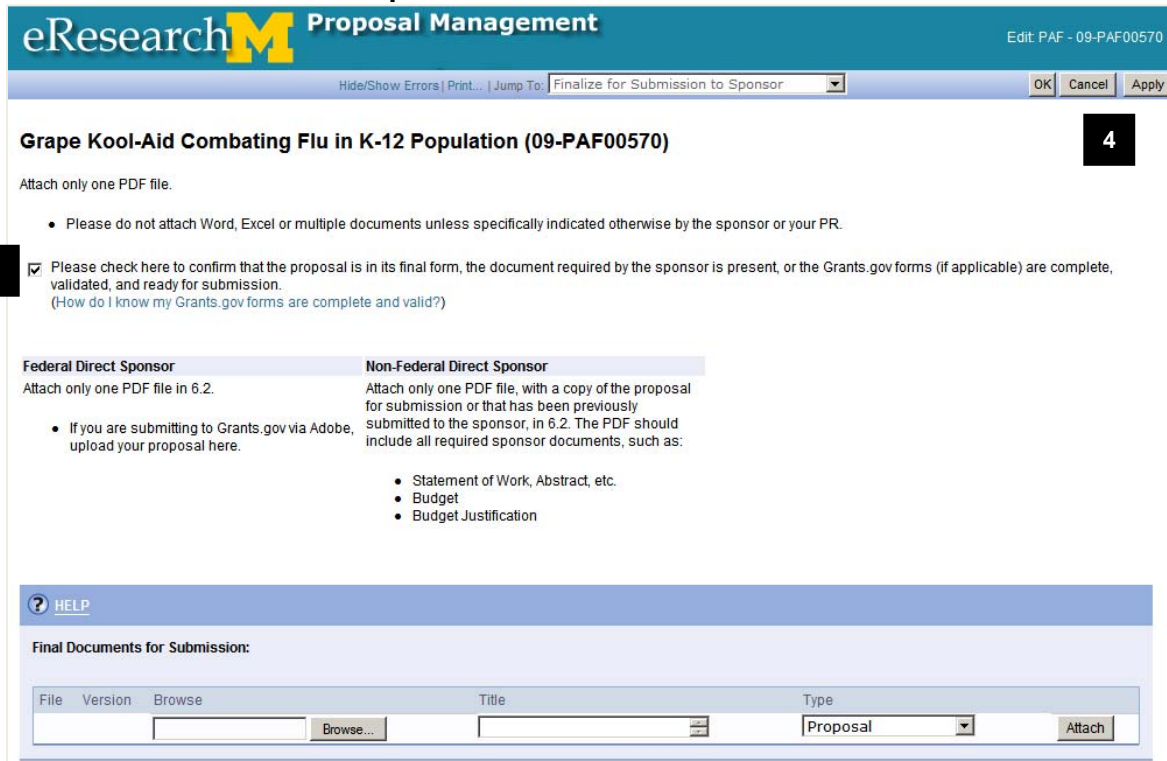
**PAF Workspace: Unit Review state**



**Note:** Steps to finalize shown using **Finalize for Submission to Sponsor**. Could also finalize from PAF Worksheet.

1. Click **Finalize for Submission to DRDA** from Manage Data menu.

**Finalize for Submission to Sponsor**



**eResearch Proposal Management** Edit: PAF - 09-PAF00570

Hide/Show Errors | Print... | Jump To: Finalize for Submission to Sponsor

**Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)**

Attach only one PDF file.

- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

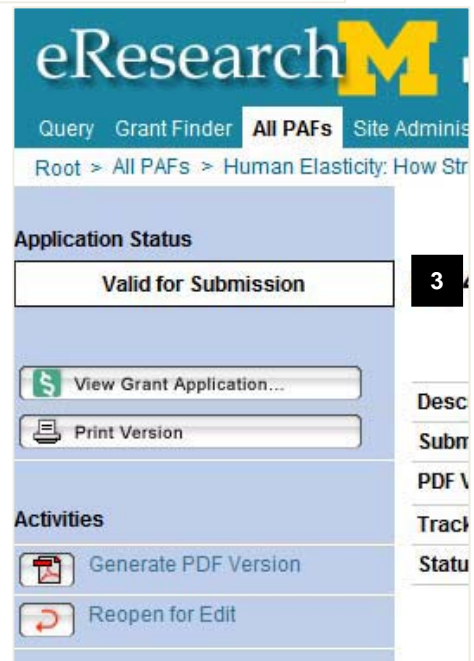
Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.  
(How do I know my Grants.gov forms are complete and valid?)

Federal Direct Sponsor	Non-Federal Direct Sponsor
Attach only one PDF file in 6.2.	Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.2. The PDF should include all required sponsor documents, such as:
<ul style="list-style-type: none"> <li>If you are submitting to Grants.gov via Adobe, upload your proposal here.</li> </ul>	<ul style="list-style-type: none"> <li>Statement of Work, Abstract, etc.</li> <li>Budget</li> <li>Budget Justification</li> </ul>

**Final Documents for Submission:**

File	Version	Browse	Title	Type
		<input type="text"/> Browse...	<input type="text"/>	Proposal

- Indicate for DRDA that the proposal is final & ready to be submitted.
  - Selecting the box means that YES the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.
  - This check box changes the answer to question 5.17 **Are you ready to upload the final document for submission to the sponsor?** to **Yes** in the PAF worksheet.
  - For Grants.Gov submissions in eResearch, you do not need to upload any documents.
- Grants.gov status needs to be "Valid for Submission"
  - An error will occur if it is not valid for submission.
  - To learn how to validate see the [Grants.gov in eRPM step by step procedure](#).
- Click **OK**.  
Proposal is finalized & ready for submission to the sponsor.



**eResearch**

Query Grant Finder All PAFs Site Adminis

Root > All PAFs > Human Elasticity: How Str

**Application Status**

**Valid for Submission**

**Activities**

**PAF Workspace: Unit Review State**

- 5. A notice is added to the PAF Workspace indicating that the proposal has been finalized and is ready for submission.

**PI & Project Team Will Submit**

This section explains the steps to finalize when PI/Project Team will submit the proposal to the sponsor:

The project team cannot log project submission until the proposal is finalized.

**PAF Workspace: Unit Review state**

**Note:** Steps to finalize shown using **Finalize for Submission to Sponsor**. Could also finalize from PAF Worksheet.

1. Click **Finalize for Submission to Sponsor** under the Manage Data menu.

### Finalize for Submission to Sponsor

2. Indicate that the proposal is final & ready to be submitted.
3. Upload 1 PDF of the final proposal document to keep a historical record. **! Make sure to click Attach.**
4. Click **OK**.  
Proposal is finalized & ready for submission to the sponsor.

### PAF Workspace: Unit Review State

5. Message appears on the PAF Workspace that the proposal is finalized & ready for submission to the sponsor.

- Project team can then log submission.

Directions:

[http://www.umich.edu/~eresinfo/erpm/docs/PM\\_PT\\_LogSubmission\\_SS.pdf](http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_LogSubmission_SS.pdf)

**Activities**

- Copy PAF Info to Grants-gov Forms
- Log Project Team Submission to Sponsor** (6)
- Send to DRDA for Submission to Sponsor
- Post a Comment for the Entire Project
- Clone PAF

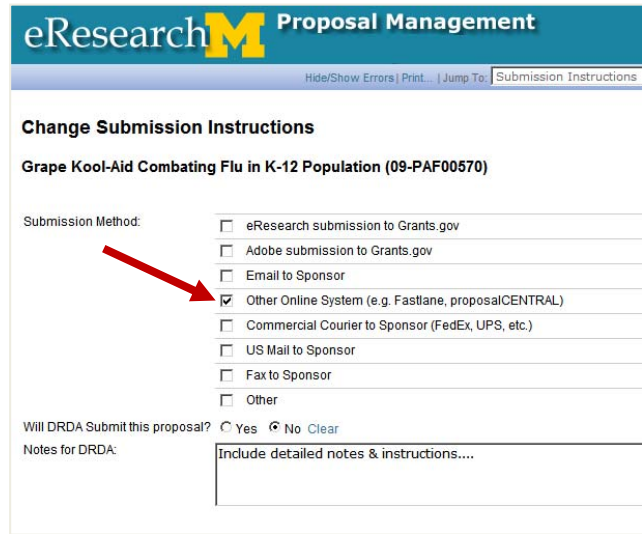
**Recent Activity**

Activity	Author	Activity Date
Sent to Project Team for Submission to Sponsor	Pat PR	4/1/2009 4:06 PM EDT
DRDA Signing Officer Approved	Pat PR	4/1/2009 4:06 PM EDT
Complete Administrative Check	Pat PR	4/1/2009 4:06 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:32 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:30 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:23 PM EDT
Unit Approved	Unit Approver	4/1/2009 3:07 PM EDT



**Submission Method Electronically via Other Online System**

This section explains the steps to finalize an electronic submission that either the PI & Project Team or DRDA will submit.



**eResearchM Proposal Management**

Hide/Show Errors | Print... | Jump To: | Submission Instructions

**Change Submission Instructions**

**Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)**


Submission Method:

- eResearch submission to Grants.gov
- Adobe submission to Grants.gov
- Email to Sponsor
- Other Online System (e.g. Fastlane, proposalCENTRAL)
- Commercial Courier to Sponsor (FedEx, UPS, etc.)
- US Mail to Sponsor
- Fax to Sponsor
- Other

Will DRDA Submit this proposal?  Yes  No

Notes for DRDA:

**PAF Workspace: Unit Review state**



**eResearchM Proposal Management**

All PAFs

All PAFs > Grape Kool-Aid Combating Flu in K-12 Population

**Current State**

Unit Review

Title: Grape Kool-Aid Combating Flu in K-12 Population

According to the PAF, the proposal documents are not yet finalized. [Click Here for more info](#)

Principal Investigator(s): James House UM Principal Investigator jimhouse@umich.edu 734-764-6526

Primary Research Administrator: Pat Administrator pata@umich.edu null

Project Administrative Home: Epidemiology Department (458000)

**1** Finalize for Submission to Sponsor

Sponsor Name Sponsor ID Official Sponsor Name Sponsor Type

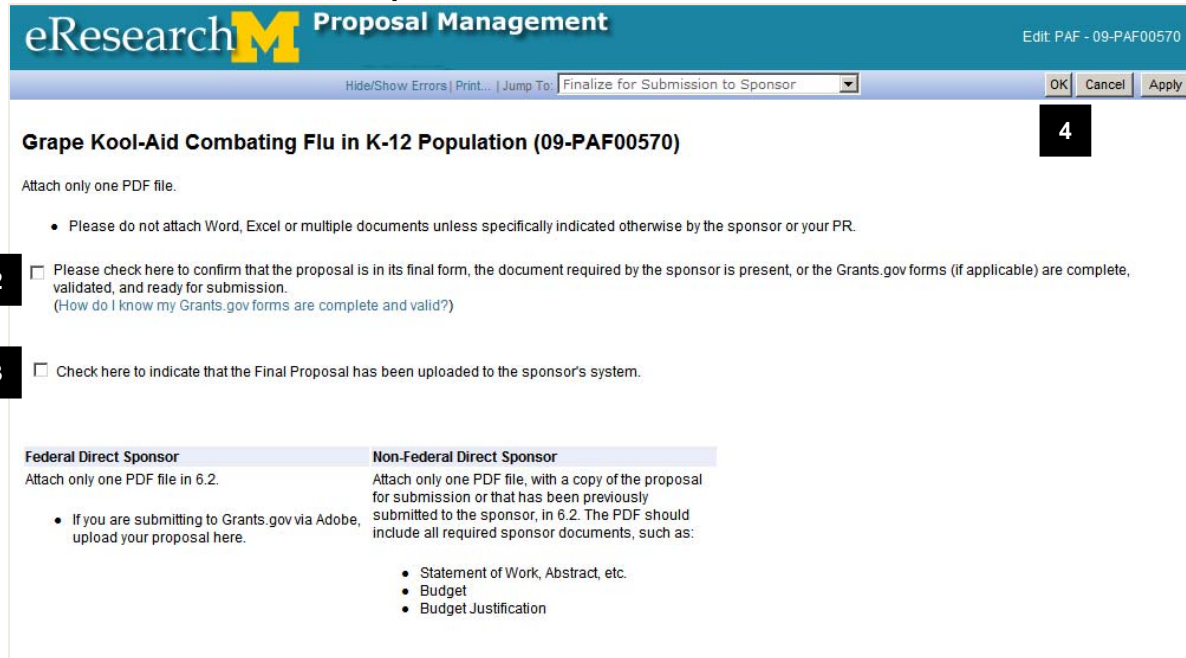
Sponsor 1 Direct

Sponsor Programs:

**Note:** Steps to finalize shown using **Finalize for Submission to Sponsor**. Could also finalize from PAF Worksheet.

1. Click **Finalize for Submission to Sponsor** under the Manage Data menu.

### Finalize for Submission to Sponsor



**eResearch Proposal Management** Edit: PAF - 09-PAF00570

Hide/Show Errors | Print... | Jump To: Finalize for Submission to Sponsor [OK] [Cancel] [Apply]

**Grape Kool-Aid Combating Flu in K-12 Population (09-PAF00570)** 4

Attach only one PDF file.

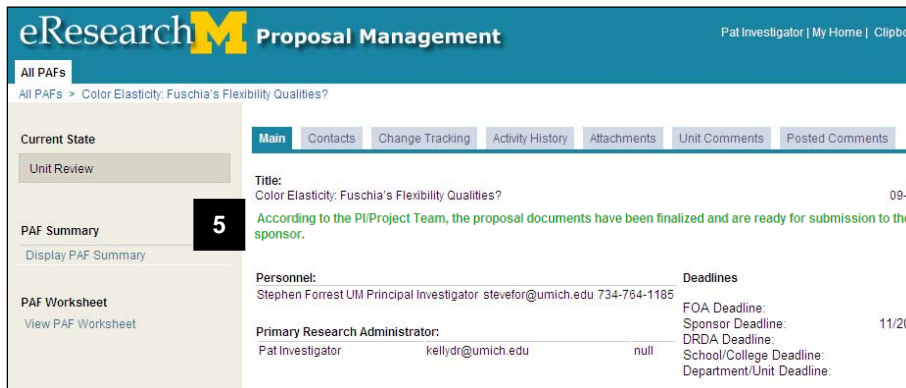
- Please do not attach Word, Excel or multiple documents unless specifically indicated otherwise by the sponsor or your PR.

2  Please check here to confirm that the proposal is in its final form, the document required by the sponsor is present, or the Grants.gov forms (if applicable) are complete, validated, and ready for submission.  
(How do I know my Grants.gov forms are complete and valid?)

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

Federal Direct Sponsor	Non-Federal Direct Sponsor
Attach only one PDF file in 6.2.	Attach only one PDF file, with a copy of the proposal for submission or that has been previously submitted to the sponsor, in 6.2. The PDF should include all required sponsor documents, such as:
<ul style="list-style-type: none"> <li>If you are submitting to Grants.gov via Adobe, upload your proposal here.</li> </ul>	<ul style="list-style-type: none"> <li>Statement of Work, Abstract, etc.</li> <li>Budget</li> <li>Budget Justification</li> </ul>

### PAF Workspace: Unit Review State



**eResearch Proposal Management** Pat Investigator | My Home | Clipboard

All PAFs

All PAFs > Color Elasticity: Fuschia's Flexibility Qualities?

Current State: Unit Review

Main | Contacts | Change Tracking | Activity History | Attachments | Unit Comments | Posted Comments

Title: Color Elasticity: Fuschia's Flexibility Qualities? 09-F

According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor. 5

Personnel: Stephen Forrest UM Principal Investigator stevefor@umich.edu 734-764-1185

Primary Research Administrator: Pat Investigator kellydr@umich.edu null

Deadlines: FOA Deadline: Sponsor Deadline: 11/20/ DRDA Deadline: School/College Deadline: Department/Unit Deadline:

- Indicate that the proposal is final & ready to be submitted.
- Indicate that the proposal has been uploaded to sponsor system.
- Click **OK**.
- Message appears on the PAF Workspace that the Proposal is finalized & ready for submission to the sponsor.

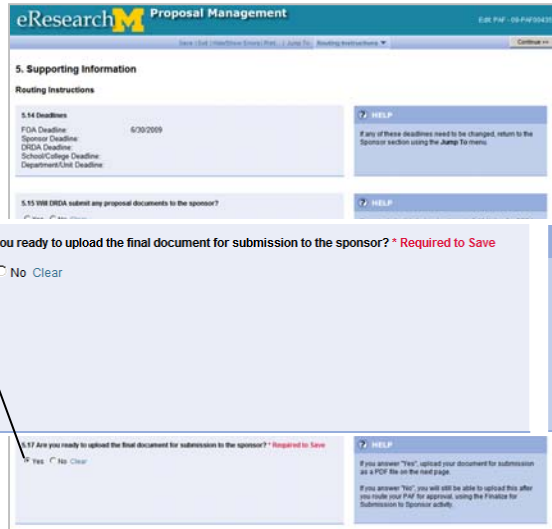
**Finalizing from the PAF Worksheet**

Use the steps below to finalize your proposal documents when initially completing the PAF worksheet. It will still be in the Proposal Preparation state.



If your proposal is NOT ready to be finalized, use **Finalize for Submission to Sponsor** under Manage Data menu.

**PAF Worksheet Section 5. Supporting Information**



1. If your proposal is final when completing the PAF, select **Yes** for question 5.17 **Are you ready to upload the final document for submission to the sponsor?** on the PAF Worksheet.

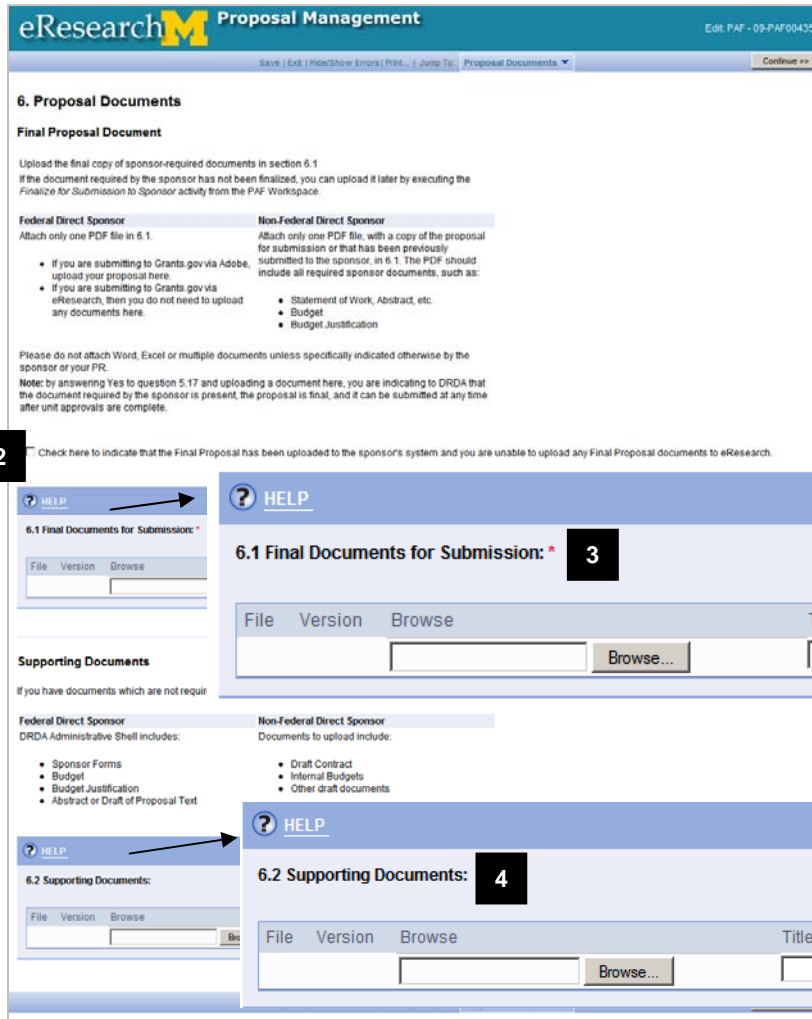
**Note:** If not all documents associated with this proposal have been finalized, please answer no to question 5.17.

Answering YES to question 5.17 indicates to DRDA that the proposal is final and can be submitted at any time after unit & DRDA approvals are complete.

You can manage this page after you route for approval by executing **Finalize for Submission to Sponsor** under the Manage Data menu in the PAF Workspace.

Even if you validate SF424 (Grants.gov) forms, you still must finalize.

PAF Worksheet Final Proposal (Section 6. Proposal)



2. If you have uploaded your submission to the sponsor system & cannot upload any documents here, click the checkbox to note this.  
 Note: You will only have this option if you selected "Other Online System (e.g. Fastlane)" for question 5.15 Submission Methods.
3. Attach sponsor-required documents in 6.1 Final Documents for Submission.
  - For Non-Federal Direct Sponsor, the PDF should include Statement of Work, Abstract, etc.; Budget; Budget Justification
  - For Federal Direct Sponsor, attach 1 PDF.
  - Attach 1 PDF if you submit to Grants.gov via Adobe.
  - For Grants.Gov in eResearch, you do not need to attach a document, but you must validate. See Grants.gov in eRPM step by step procedure.

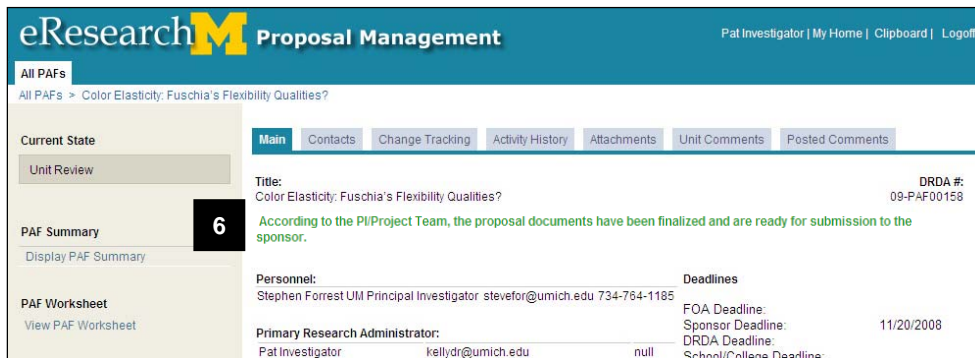
**Important!** Do NOT upload the internal documents here.

4. Attach documents needed for UM Internal Review (Unit & DRDA Review) in **6.2 Supporting Documents**. For Adobe Grants.gov submissions and non-Grants.gov submissions, attach all final documents.

**Important!** Do NOT upload the Final Proposal documents here.

- For a **Federal Direct Sponsor** attach DRDA Administrative Shell which includes:
    - Sponsor Forms
    - Budget
    - Budget Justification
    - Abstract or Draft of Proposal Text
  - For **Non-Federal Direct Sponsor** attach:
    - Draft Contract
    - Internal Budgets
    - Other draft documents The Administrative Shell is not submitted to the sponsor.
5. Complete the steps to route the PAF for approval. You have noted that the proposal is finalized. It can be submitted to the sponsor after all unit & DRDA reviews are complete.

PAF Workspace: Unit Review state



The screenshot shows the eResearchM Proposal Management interface. The top navigation bar includes 'Pat Investigator | My Home | Clipboard | Logout'. The main content area is titled 'All PAFs' and shows a breadcrumb trail 'All PAFs > Color Elasticity: Fuschia's Flexibility Qualities?'. Below this, there are tabs for 'Main', 'Contacts', 'Change Tracking', 'Activity History', 'Attachments', 'Unit Comments', and 'Posted Comments'. The 'Main' tab is active, displaying the following information:

- Title:** Color Elasticity: Fuschia's Flexibility Qualities? **DRDA #:** 09-PAF00158
- Personnel:** Stephen Forrest UM Principal Investigator stevefor@umich.edu 734-764-1185
- Primary Research Administrator:** Pat Investigator kellydr@umich.edu null
- Deadlines:** FOA Deadline: Sponsor Deadline: 11/20/2008; DRDA Deadline: School/Collene Deadline:

A black box with the number '6' is overlaid on the 'PAF Summary' section, which contains the text: 'According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor.'

6. After the proposal has been finalized for DRDA submission, **“According to the PI/Project Team, the proposal documents have been finalized and are ready for submission to the sponsor”** displays.

**Topic 12: Project Team Log Submission to Sponsor**

Goal/outcome:

Log the submission to sponsor.

Objectives:

After completing this module, you will be able to:

- Identify that the Project Team cannot log submission to sponsor until the proposal has been finalized.
- Identify that only the UM PI or Primary Research Administrator can log a submission to a sponsor.
- Log a Project Team submission to the sponsor.

<b>Materials</b>	<b>Page</b>
Log Project Team Submission to Sponsor (step by step procedure)	162



## Log Project Team Submission to Sponsor

All submission methods are recorded in eResearch for a proposal that has been submitted to its sponsor. When the Project Team has submitted the proposal, the recording of the submission methods are accomplished using an activity called Log Project Team Submission to Sponsor. DRDA will not be able to begin processing an award unless this activity is completed.

**Who Can Log Project Team Submission to Sponsor:** Only the UM PI or Primary Research Administrator can complete the activity Log Project Team Submission to Sponsor.

### Important Information

- If the Project Team has indicated on the PAF Worksheet that DRDA will submit, then DRDA will record the submission.



The activity Log Project Team Submission to Sponsor is available only under the following conditions:

- after DRDA review and approvals have been completed
- proposal has been finalized (upload 1 PDF of the final proposal document when finalizing)
- and the PAF/proposal in one of the following States:
  - Project Team Submission to Sponsor
  - Submitted to Sponsor
  - Negotiation in Progress



When the proposal has been in the state of Project Team Submission to Sponsor for longer than 9 days, the PI and Primary Research Administrator will receive emails at 10, 20 and 30 days as a reminder to execute the activity.

PAF Workspace


1. Click the **Log Project Team Submission to Sponsor** activity from the PAF Workspace.
2. **Note:** this activity is available only after the proposal has been finalized. You will see the text in green on the PAF Workspace **“This proposal has been finalized and is ready for submission.”**


Log Project Team Submission to Sponsor Activity Window

3. Click **Add**.

**Add Submission Dates and Methods**

**Edit PRPSL\_Submission Dates and Methods**

Submission Date:   **4**

Submission Method:   **5**

Submission Notes:  **6**

Submission Tracking Number:

Submission Recipient:

\* Required **7**

4. Enter **Submission Date**.
5. Select **Submission Method**.
6. Optional, enter **Submission Notes, Tracking Number, and Recipient**.
7. Click **OK** to return to the Log Project Team Submission to Sponsor Activity Window.

**Log Project Team Submission to Sponsor**

**Methodology for Color Spectrum Analysis (09-PAF01200)**

Complete the information to indicate the submission method(s) and date(s).  
Click OK to save this information and log your submission.  
Click CANCEL to cancel this activity and close this window.

Proposal Submission Dates and Methods:

Submission Date	Submission Method	Submission Notes	Submission Tracking Number	Submission Recipient
<input type="checkbox"/> [Edit] 4/8/2009	Electronically via Email	these are the submission notes that I added.	GB45678	Sam Sponsor Secretary

**8**

8. Click **OK** to return to the PAF Workspace.

PAF Workspace

eResearchM Proposal Management
Andy Administrator | My Home | Clipboard | Logoff

All PAFs

[All PAFs](#) > [Methodology for Color Spectrum Analysis](#)

**Current State**

Submitted To Sponsor

**PAF Summary**

[Display PAF Summary](#)

**PAF Worksheet**

[View PAF Worksheet](#)

**Manage Data**

[Change Primary Research Administrator](#)

[Manage Administrative Personnel](#)

[Related Projects](#)

**Activities**

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

[Project Team Request DRDA Action](#)

[Log Project Team Submission to Sponsor](#)

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

[Clone PAF](#)

Main
Contacts
Change Tracking
Activity History
Attachments
Hardships
Unit Comments
Posted Comments

**Title:**  
Methodology for Color Spectrum Analysis **DRDA #:**  
09-PAF01200

This proposal has been Finalized and is ready for submission.

**Principal Investigator(s):**  
Stephen Forrest UM Principal Investigator stevefor@umich.edu 734-764-1185

**Primary Research Administrator:**  
Andy Administrator aadm@umich.edu 734-764-XXXX

**Sponsors:**

PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type
Physical Systems Inc			Direct

**DRDA Project Representative:**  
Pat PR

**Routing and Approval Status:**

Department	Department ID	Approved?	Date Approved	Approval Note
Neurology Department	246000	yes	4/1/2009 3:07 PM	
Medical School	230000	yes	4/1/2009 3:23 PM	
LSA Physics	184500	yes	4/1/2009 3:30 PM	
LSA Dean: Dean's Office	174200	yes	4/1/2009 3:32 PM	

**DRDA Approval Status:**

DRDA Approval	Approved?	Date Approved	Approval Note
Administrative Check	yes	4/1/2009	Approved
Project Representative	yes	4/1/2009	Approved
Signing Officer	yes	4/1/2009	Approved

**Recent Activity**

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

Activity	Author	Activity Date
Submission to Sponsor Logged by Project Team	Project Team	4/3/2009 10:44 AM EDT
Sent to Project Team for Submission to Sponsor	Project Team	4/1/2009 4:06 PM EDT

**Deadlines**

FOA Deadline:

Sponsor Deadline: 3/31/2009

DRDA Deadline:

School/College Deadline:

Department/Unit Deadline:

**Recent Activity**

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

Activity	Author	Activity Date
Submission to Sponsor Logged by Project Team	Project Team	4/3/2009 10:44 AM EDT

Notice that the State of the PAF is now **Submitted to Sponsor** and the activity is logged in Recent Activity.

If you need to add more submission dates and methods, repeat steps 1-8.

Last updated: 10/01/2009

4 of 4

<http://eresearch.umich.edu>

Training Guide Last Updated: 10/01/2009

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## Topic 13: Clone and Cancel PAF

Goal/outcome:

- Clone a PAF for creating a new PAF or for reuse as a template.
- Cancel a PAF.

Objectives:

By the end of this module, you will be able to:

- Identify that anyone listed as on a PAF with edit rights can use the clone functionality.
- Identify how the Primary Research Administrator or UM PI can use the cancel functionality.
- Identify that there are states when you need to contact the DRDA to have a PAF cancelled.

<b>Materials</b>	<b>Page</b>
Clone a PAF (step by step procedure)	167
Cancel PAF (step by step procedure)	170

## Clone a PAF

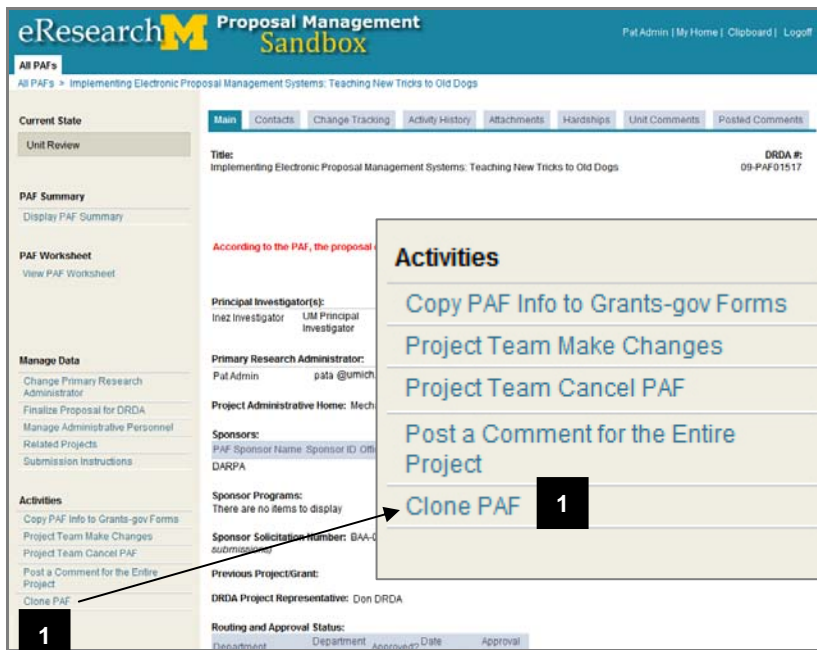
This procedure details how to make a clone (copy) of a PAF Worksheet. Before you begin, you need to locate the PAF you want to clone.

**Who Can Clone:** You can only clone PAFs that you are listed on as key or administrative personnel with edit rights.

### Important Information

- A PAF can be cloned from any state, e.g., Proposal Preparation, Unit Review, DRDA Review, Cancelled, etc.
- Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select **New** as the cloning type. See the Related PAFs procedure for more information.
- When a PAF is cloned, the copy of the PAF:
  - Contains some, *but not all*, data from the PAF Worksheet.
  - Does not include from the original PAF attached documents & PI signatures of PAF/Conflict of Interest statement.
- A cloned PAF (child) cannot be accessed from the original (parent). Go to your Home Workspace to find your clone. It will have state of Proposal Preparation.

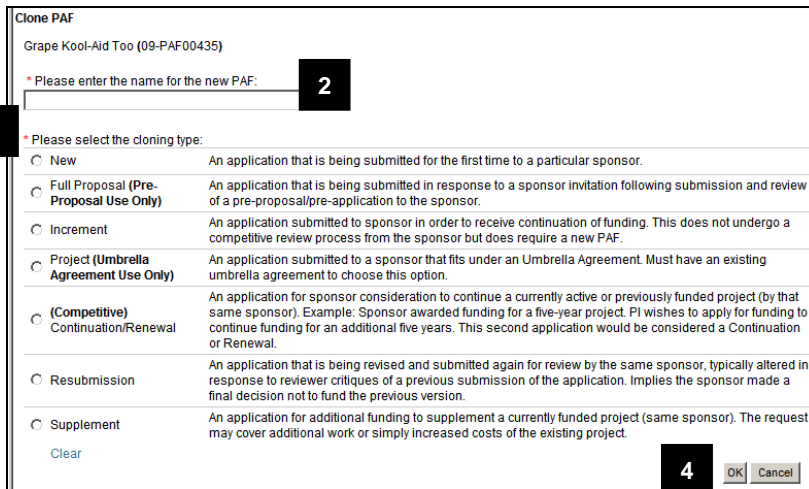
### PAF Workspace



1. Click the **Clone PAF** activity from the **PAF Workspace**.



### Clone PAF Window



2. Enter the name for the new PAF.

**Important!**

Cloning a PAF automatically relates the clone (child) & original (parent) PAFs unless you select **New** as the cloning type.

3. Select the **cloning type**, your options include:

- **New** An application that is being submitted for the first time to a particular sponsor.
- **Full Proposal (Pre-Proposal Use Only)** An application that is being submitted in response to a sponsor invitation following submission and review of a pre-proposal/pre-application to the sponsor.
- **Increment** An application submitted to sponsor in order to receive continuation of funding. This does not undergo a competitive review process from the sponsor but does require a new PAF.
- **Project (Umbrella Agreement Use Only)** An application submitted to a sponsor that fits under an Umbrella Agreement. Must have an existing umbrella agreement to choose this option.
- **(Competitive) Continuation/Renewal** An application for sponsor consideration to continue a currently active or previously funded project (by that same sponsor). Example: Sponsor awarded funding for a five-year project. PI wishes to apply for funding to continue funding for an additional five years. This second application would be considered a Continuation or Renewal
- **Resubmission** An application that is being revised and submitted again for review by the same sponsor, typically altered in response to reviewer critiques of a previous submission of the application. Implies the sponsor made a final decision not to fund the previous version.
- **Supplement** An application for additional funding to supplement a currently funded project (same sponsor). The request may cover additional work or simply increased costs of the existing project.

4. Click **OK**.

**Note:** When a PAF is cloned, the following information is **NOT** carried copied:

- PI signatures on PAF/Conflict of Interest Statement
- Attached documents
- Answers to some of the PAF Worksheet questions.

**Tip:** Use the Hide/Show Errors function within the PAF Worksheet to display the required fields that do not copy when a PAF is cloned.

PAF Workspace Recent Activity Section

The screenshot shows the 'eResearchM Proposal Management Sandbox' interface. The main content area displays details for a PAF titled 'Implementing Electronic Proposal Management Systems: Teaching New Tricks to Old Dogs'. A callout box labeled '8' points to the 'My Home' link in the top right corner. Below the PAF details, the 'Recent Activity' section is visible, showing a list of activities. A callout box labeled '5' points to the 'Clone PAF' link in the left sidebar. Another callout box labeled '6' points to the 'Author' column in the activity list, and a third callout box labeled '7' points to the 'Activity Date' column. The activity listed is 'Project Team Cloned PAF' by 'Pat Admin' on '4/29/2009 11:19 AM EDT'.

5. Notice that in the Recent Activity **Project Team Cloned PAF**.
6. Who cloned the PAF is displayed as **Author**.
7. When the PAF was cloned is displayed as **Activity Date**.
8. Click **My Home** to return to your Home Workspace.

Home Workspace

The screenshot shows the 'eResearchM Proposal Management Sandbox' interface. The main content area displays a list of 'PAFs with Required Action'. A callout box labeled '9' points to the 'PAFs with Required Action' section header. Below this, a table lists the PAFs. A callout box labeled '10' points to the 'State' column in the table. The table has columns for ID, Name, Date Modified, State, PI, Dept, and Sponsor. The PAF listed is 'Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2' with a state of 'Proposal Preparation'.

9. Your cloned PAF appears in the **PAFs with Required Action** section of your Inbox.
10. Notice that the state of your cloned PAF is **Proposal Preparation**.

## Project Team Cancel PAF

A PAF can be cancelled during the following states:

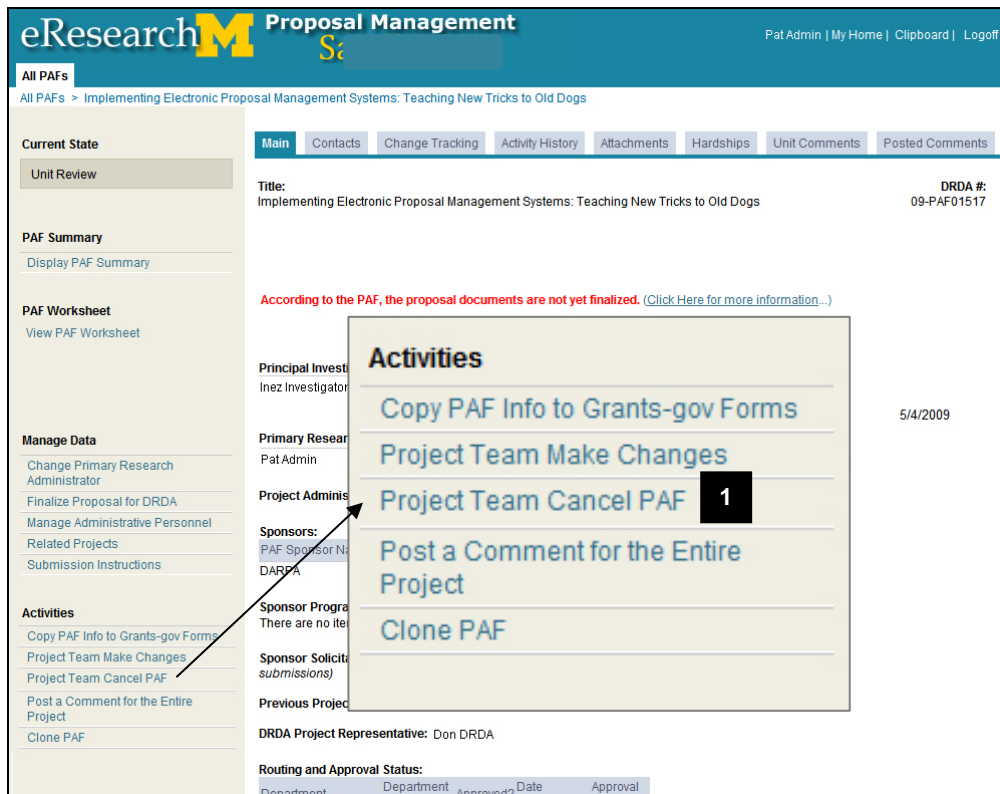
- Proposal Preparation
- Unit Review
- Unit Review – Project Team Making Changes
- Reviewer Making Changes

**Who Can Cancel A PAF:** The UM PI and the Primary Research Administrator can cancel a PAF.

### Important Information

- If you do not have the activity **Project Team Cancel PAF**:
  - Verify that you are the **UM PI** or the **Primary Research Administrator** (only these roles can cancel a PAF)
  - Verify that you are in a state that allows you to cancel the PAF (Proposal Preparation, Unit Review, Unit Review – Project Team Making Changes, Reviewer Making Changes).
  - If you need the PAF canceled while in another state than listed above use the activity **Request DRDA Action** to contact the DRDA for assistance to cancel the PAF.
- DRDA can restore a cancelled PAF upon request from the UM Principal Investigator (PI) or the Primary Research Administrator.

### PAF Workspace



1. Click **Project Team Cancel PAF** from the PAF Workspace.

**Project Team Cancel PAF window**

Project Team Cancel PAF

**Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2 (09-PAF01753)**

Enter comments in the text box (optional).  
Click OK to complete the PAF cancellation process.  
Click CANCEL to cancel this activity and close this window.

Comments:

- Optional, enter **Comments**.  
You may wish to enter information regarding the reason for the cancellation or who requested the cancellation. These comments appear in the Recent Activity section of the PAF Workspace.
- Click **OK**.

**PAF Workspace**

The screenshot shows the PAF Workspace for 'Implementing Electronic Proposal Management Systems: Teaching New Tricks to Old Dogs'. The 'Current State' is 'Cancelled' (marked with a 4). The 'Recent Activity' table shows the cancellation event:

Activity	Author	Activity Date
Project Team Canceled PAF	Pat Admin	4/30/2009 2:00 PM EDT

- Notice that the current state of the PAF is Cancelled and that the Activity, the Author, and the date the PAF was cancelled is logged in Recent Activity.

**Home Workspace**

The screenshot shows the Home Workspace with the 'Cancelled' tab selected (marked with a 5). The PAFs list includes:

ID	Name	Date Modified	State	PI	Dept	Sp
09-PAF01753	Implementing Electronic Proposal Management Systems: Dogs and Tricks Part 2	4/30/2009 2:00 PM	Cancelled	Pinv	Mechanical Engineering	DAF

- Once a PAF has been cancelled, it is listed under the **Cancelled** tab on the Home Workspace.

## Topic 14: States from DRDA Reviews to Active

Goal/outcome:

- Review workflow states from DRDA Reviews through Active.

Objectives:

By the end of this module, you will be able to:

- Recognize the DRDA workflow states.
- Identify the need to use the activity **Request DRDA Action** when changes are needed during DRDA states.
- Recognize award notifications sent from eRPM.
- Locate award documents in eRPM.

Materials	Page
Workflow <a href="http://www.umich.edu/~eresinfo/erpm/workflow/drda_review.html">http://www.umich.edu/~eresinfo/erpm/workflow/drda_review.html</a>	173
PAF Changes (step by step procedure)	113
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Project Award Notice (field description)	175
Project Award Change (field description)	182

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

# eResearch<sup>M</sup> Proposal Management

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Overview Proposal Preparation Unit Review DRDA Review Submission to Sponsor Award Active

## eRPM System Workflow without Changes

Proposal Approval Forms (PAFs) are entered in the eResearch Proposal Management system. The location of where the proposal is in the process is noted with its "State", e.g., Proposal Preparation, Unit Review, DRDA Review.

- **States** are shown on the workflow picture in the **yellow boxes** that segment the arrow.
- **State transitions** are shown on the workflow picture as **black lines** that separate the states.

**High-Level Proposal States**  
*Excludes Proposal Changes*

1 PI/Research Administrator  
2 Units  
3 DRDA  
4 Sponsor  
5 Award  
6 Active Project

Unit Review State  
DRDA Review\*  
Submission to Sponsor\*  
Awarded\*  
Active State

**State**  
Location of where the proposal is in the process.

\* Composed of more detailed states.

*Place your mouse on the picture above to view state transitions.  
Click [here](#) to view a larger version.*

- PIs, Reviewers, and Administrators complete "Activities" during various states.
- Before a proposal can move from one state to another certain activities must be completed for a "State Transition" to occur.

### Other Sites/Links

- eRPM Help Index
- eRPM Job Aids**
  - PI Sign PAF/COI
  - Create/complete PAF
  - Review/Approve PAF
- eRPM Workflow & PAF States
- UM Research Administration
- MAIS
- DRDA Sponsored Projects Services
- Research Administrators Toolkit
- Grants.gov



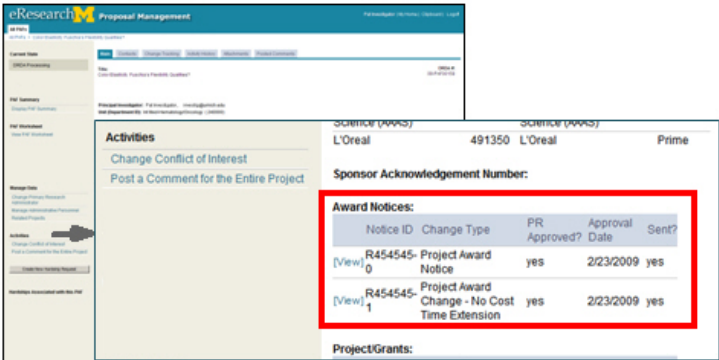
<http://www.umich.edu/~eresinfo/erpm/docs/PANsPACs.html>

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Proposal Management

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[FAQs](#)
[Sandbox](#)
[Unit Liaisons](#)
[Contact Us](#)

### Award Notifications Sent from eRPM - Since 1/5/09

- 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.
    - Initially identified by [Research Unit Liaisons](#).
    - Maintained in eRPM by [Reviewers](#) or [Research Unit Liaisons](#).
- 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



- **PI & Project Team** - Can also view awarded projects on the "Active" tab. [\[View Sample\]](#)
- **Reviewer** - Can also view awarded projects on the "Active/Closed/Turned Down/Withdrawn" tab. [\[View Sample\]](#)

### Need more information?

View samples that have detailed descriptions

- [Sample PAN](#)
- [Sample PAC](#)

### Improvements Made - In Feb & Mar 09

- **E-mail Subject line** includes: Notice ID (PGN-#), DRDA number, UM Principal Investigator last name
- **PAN** text moved to improve printability
- **PAN/PAC numbering** changes
  - Note: Any PAN sent between 1/5 - 2/24/09
    - PAN numbered with a suffix of "1" (e.g., F123456-1)
    - Caused first PAC to be numbered "2" (e.g., F123456-2)
  - Effective 2/25/09
    - **PAN numbering** begins with to PGN-0
      - E.g., F123456-0
    - **PACs** will increment the Notice ID by 1
      - First PAC is: PGN-1 (e.g, F123456-1), second PAC is: PGN-2 (e.g., F123456-2), etc.
- **PAN/PAC e-mail recipients** listed at bottom of PAN/PAC e-mail

### eRPM address changed - As of 3/26/2009

If you have PAN/PAC message sent prior to 3/26/09, when you click on the link to eRPM you will receive a security certificate error. If you accept the error, you will be able to proceed and view the award document.

**Other Sites/Links**

[eRPM Help Index](#)

**eRPM Job Aids**

- [PI Sign PAF/COI](#)
- [Create/complete PAF](#)
- [Review/Approve PAF](#)

[eRPM Workflow & PAF States](#)

[UM Research Administration](#)

[MAIS](#)

[DRDA Sponsored Projects Services](#)

[Research Administrators Toolkit](#)

[Grants.gov](#)

## Project Award Notice - Description

Starting January 5, 2009:

- 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
  - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.
- **Important!** If you have junk or spam email filters, please add [eresearch@umich.edu](mailto:eresearch@umich.edu) to your address book/contacts or safe/trusted senders list.
- The content of the award notification has not changed although the appearance is slightly different.
- The award notification is now in the text of an e-mail notification instead of an attached document.
  - **Tips:** Messages sent from the eResearch system are sent as html messages. If you use a plain text email system, e.g., Groupwise, enable html messages so that the link to the award document is active.
  - **Warning!** If you use a plain text e-mail system, e.g., Groupwise, when you forward an email sent from the eResearch system, the link is broken.
- Links into the eRPM system will be included in the e-mail to provide access to the actual grant and contract documents.
- When you start to use the eResearch Proposal Management (eRPM) system, you will be able to view award notifications right in eRPM.
- The PAN is broken into three sections below to demonstrate the changes. To view an example of the full PAN, go to the end of this document.

### Project Award Notice – Section 1

**From:** eresearch@umich.edu **A**

**Sent:** Wednesday, February 18, 2009 2:11 PM

**To:** investigator\_pat@umich.edu, administrativecontacts@umich.edu, panpancontacts@umich.edu

**Subject:** PAN for F123456-0 (09-PAF12345) Investigator **B**

DO NOT REPLY TO THIS MESSAGE. NO RESEARCH ACTION REQUIRED

---

**UM Principal Investigator:** Pat Investigator **B1** **Date:** 2/18/09 **B2**

---

**Unit (Department ID):** Otorhinolaryngology Department (249000) **B3**

---

**From DRDA Project Representative:** DRDA Project Representative, 734-555-5555, drda\_pr@umich.edu **B4**

---

**DRDA Number:** 09-PAF12345

---

**Notice ID:** F123456-0

---

**Project Title:** Sample Project Title

**A.** Notice that the sender is **eresearch.umich.edu**.

**Note:** If you use spam filters, please make a rule or exception so that you can receive emails from **eresearch.umich.edu**.

**B.** E-mail **Subject** includes:

1. **PAN**
2. **Notice ID**  
PGN-0  
e.g., F123456-0
3. **(DRDA Number)**  
e.g., (09-PAF12345)
4. **UM Principal Investigator Last Name**  
e.g., Investigator

**Project Award Notice – Section 1 (continued)**

	<p><b>From:</b> eresearch@umich.edu  <b>Sent:</b> Wednesday, February 18, 2009 2:11 PM  <b>To:</b> investigator_pat@umich.edu, administrativecontacts@umich.edu, panpancontacts@umich.edu  <b>Subject:</b> PAN for F123456-0 (09-PAF12345) Investigator</p> <p style="text-align: center;"><b>Project Award Notice</b> DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED</p>
<b>C</b>	<p><b>UM Principal Investigator:</b> Pat Investigator <span style="float: right;"><b>Date:</b> 2/18/09</span></p>
<b>D</b>	<p><b>Unit (Department ID):</b> Otorhinolaryngology Department (249000)</p>
<b>E</b>	<p><b>From DRDA Project Representative:</b> DRDA Project Representative, 734-555-5555, drda_pr@umich.edu</p>
<b>F</b>	<p><b>DRDA Number:</b> 09-PAF12345</p>
	<p><b>Notice ID:</b> F123456-0 ← <b>G</b></p>
<b>H</b>	<p><b>Project Title:</b> Sample Project Title</p>

- C.** UM Principal Investigator who received the award and date when processed.
- D.** Administrative Home for the project.
- E.** DRDA Project Representative contact for the award.
- F.** 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

**G. Notice ID**

- 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
- Notice ID appears here and in the e-mail subject.

**H. Project Title**

**Project Award Notice – Section 2**

<b>I</b>	<b>Sponsors:</b>				
	PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type	
	NSF	909300	National Science Foundation	Direct	
	<b>Direct Sponsor Award Reference Number:</b>				
<b>Prime Sponsor Award Reference Number:</b>					
<b>CFDA Number:</b> There are no items to display					
<b>J</b>	<b>PGN No:</b>	PGN	Short Cd	CS Short Cd	Parent?
<b>K</b>		F123456			yes
<b>L</b>	<b>Class No:</b> On-Campus Research (22000)				
<b>M</b>	<b>Project Period Estimated Award:</b>	\$6,552,000.00	<b>Project Period:</b>	2/23/2009 to 2/22/2010	
	<b>Award Documents:</b>	Name	Version		
		Award Document.doc	0.01		

- I. Sponsor information
- J. Project Grant information
- K. Class code
- L. Project period estimated award
- M. Award document link

**Award Document Notes:**

- You will be prompted to login with your Kerberos ID to download a full copy of the award document.
- You will also be able to view award documents in the eRPM system (when you start using the system).
- **Warning!** If you are a plain text email system user, even if you turn on view html messages, if you forward this message you will break this link. To view award, you can login to eRPM and find the award in the system.
- **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view the award in eResearch.
- **Important!** If you are a plain text email system user (e.g., Groupwise), you must enable view html messages for this link to work.
- **Warning!** You cannot copy the Award document link and paste it into a web browser. It will not work.

**Project Award Notice – Section 3**

<b>N</b>	<b>Budget Commitment:</b>	\$5,024.00	<b>O</b>	<b>Budget Period:</b>	2/23/2009 to 2/22/2010	
<b>P</b>	<b>Indirect Cost Rate:</b>	26%	<b>Q</b>	<b>No Charges are allowed prior to:</b>	2/23/2009	
<b>R</b>	Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555, amandaadmin@umich.edu					
***The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.						
This grant is subject to the General Terms and Conditions of the Federal Demonstration Partnership (FDP), for more information visit <a href="http://www.research.umich.edu/policies/federal/fdp.html">http://www.research.umich.edu/policies/federal/fdp.html</a>						
This grant is subject to the Research Terms and Conditions (RTC). For more information, please visit <a href="http://www.research.umich.edu/policies/federal/fdp.html">http://www.research.umich.edu/policies/federal/fdp.html</a> .						
<b>S</b>	<b>Budget Period UM Cost Share:</b>					
	Line Item	Dept ID	Department	Source	Direct Costs	Indirect Costs
There are no items to display						
	<b>Total Direct Cost Share - UM:</b>		<b>Total Indirect Cost Share - UM:</b>		<b>Total UM Cost Share:</b>	
	\$0.00		\$0.00		\$0.00	

- N. Budget Commitment
- O. Budget Period
- P. Indirect Cost Rate
- Q. No charges are allowed prior to
- R. Financial Operations Project/Grant Coordinator
- S. Budget Period UM Cost Share

**Project Award Notice – Section 4**

**T**

**The University Of Michigan**  
**Division of Research Development and Administration**  
**1056 Wolverine Tower**

An award has been received and processed for the proposal identified above. 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.

- Share the PAN and copy of the grant or contract with others who need it.
- Review the PAN for the terms of the grant/contract.
- Review the grant or contract for terms and conditions, deliverables, special reports.
- Set up internal record-keeping systems.
- Prepare 7471s to budget sub-project/grants, if relevant.
- Review faculty, staff and student appointments to prepare for appointment changes. Don't forget cost sharing appointments. Remember that material changes in effort impact certification; updated reports may be required.
- Prepare paperwork for item types, barcodes, and additional shortcodes if necessary.
- Prepare paperwork to request sub-contracts, if relevant. If sub-contracts were written into your proposal, the PAN should include a memo describing the process you need to follow to request a sub-contract.
- If the budget has been modified or a modular budget was submitted, a 7471 can be submitted to Sponsored Financial Operations before the project/grant is activated so that the budget is set up appropriately. (If your budget includes A-21 monitored expenses, the 7471 and justification should be directed to DRDA.)
- Follow the directions on the front of the PAN to change the statement recipient if necessary.
- Work with the Purchasing Department to request quotes for major equipment purchases.
- Request cost sharing transfers, if relevant.

If you have any questions about the above activities, please contact your Sponsored Programs Account Coordinator.

T. Award has been received statement.

**Project Workspace**

**U**

**V**

Notice ID	Change Type	PR Approved?	Approval Date	Sent?
[View] R454545-0	Project Award Notice	yes	2/23/2009	yes
[View] R454545-1	Project Award Change - No Cost Time Extension	yes	2/23/2009	yes

U. Once you start to use eResearch Proposal Management, you can access your project workspaces via your Home Workspace.

V. You will be able to view all award notices on the project workspace.





**From:** eresearch@umich.edu  
**Sent:** Wednesday, February 18, 2009 2:11 PM  
**To:** [investigator\\_pat@umich.edu](mailto:investigator_pat@umich.edu), [administrativecontacts@umich.edu](mailto:administrativecontacts@umich.edu), [panpancontacts@umich.edu](mailto:panpancontacts@umich.edu)  
**Subject:** PAN for F123456-0 (09-PAF12345) Investigator

**Project Award Notice**

DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED

**UM Principal Investigator:** Pat Investigator **Date:** 2/18/09

**Unit (Department ID):** Otorhinolaryngology Department (249000)

**From DRDA Project Representative:** DRDA Project Representative, 734-555-5555, [drda\\_pr@umich.edu](mailto:drda_pr@umich.edu)

**DRDA Number:** 09-PAF12345

**Notice ID:** F123456-0

**Project Title:** Sample Project Title

**Sponsors:**

PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type
NSF	909300	National Science Foundation	Direct

**Direct Sponsor Award Reference Number:**

**Prime Sponsor Award Reference Number:**

**CFDA Number:**  
There are no items to display

**PGN No:**

PGN	Short Cd	CS Short Cd	Parent?
F123456			yes

**Class No:** On-Campus Research (22000)

**Project Period Estimated Award:** \$6,552,000.00 **Project Period:** 2/23/2009 to 2/22/2010

**Award Documents:**

Name	Version
------	---------



[Award Document.doc](#)

0.01

<b>Budget Commitment:</b>	\$5,024.00	<b>Budget Period:</b>	2/23/2009 to 2/22/2010
<b>Indirect Cost Rate:</b>	26%	<b>No Charges are allowed prior to:</b>	2/23/2009

Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555, [amandaadmin@umich.edu](mailto:amandaadmin@umich.edu)

\*\*\*The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.

This grant is subject to the General Terms and Conditions of the Federal Demonstration Partnership (FDP), for more information visit <http://www.research.umich.edu/policies/federal/fdp.html>

This grant is subject to the Research Terms and Conditions (RTC). For more information, please visit <http://www.research.umich.edu/policies/federal/fdp.html>.

**Budget Period UM Cost Share:**

Line Item	Dept ID	Department	Source	Direct Costs	Indirect Costs
-----------	---------	------------	--------	--------------	----------------

There are no items to display

<b>Total Direct Cost Share - UM:</b>	<b>Total Indirect Cost Share - UM:</b>	<b>Total UM Cost Share:</b>
\$0.00	\$0.00	\$0.00

**The University Of Michigan  
Division of Research Development and Administration  
1056 Wolverine Tower**

An award has been received and processed for the proposal identified above. 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.

- Share the PAN and copy of the grant or contract with others who need it.
- Review the PAN for the terms of the grant/contract.
- Review the grant or contract for terms and conditions, deliverables, special reports.
- Set up internal record-keeping systems.
- Prepare 7471s to budget sub-project/grants, if relevant.
- Review faculty, staff and student appointments to prepare for appointment changes. Don't forget cost sharing appointments. Remember that material changes in effort impact effort certification; updated reports may be required.
- Prepare paperwork for item types, barcodes, and additional shortcodes if necessary.
- Prepare paperwork to request sub-contracts, if relevant. If sub-contracts were written into your proposal, the PAN should include a memo describing the process you need to follow to request a sub-contract.
- If the budget has been modified or a modular budget was submitted, a 7471 can be submitted to Sponsored Financial Operations before the project/grant is activated so that the budget is set up appropriately. (If your budget includes A-21 monitored expenses, the 7471 and justification should be directed to DRDA.)
- Follow the directions on the front of the PAN to change the statement recipient if necessary.
- Work with the Purchasing Department to request quotes for major equipment purchases.
- Request cost sharing transfers, if relevant.

If you have any questions about the above activities, please contact your Sponsored Programs Account Coordinator.

**Project Award Change - Description**

Starting January 5, 2009:

- 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
  - Any person (or group e-mail address) listed as the PAN/PAC Notifiers for a unit (department) that was required to review the PAF.
- **Important!** If you have junk or spam email filters, please add [eresearch@umich.edu](mailto:eresearch@umich.edu) to your address book/contacts or safe/trusted senders list.
- The content of the award notification has not changed although the appearance is slightly different.
- The award notification is now in the text of an e-mail notification instead of an attached document.
  - **Tips:** Messages sent from the eResearch system are sent as html messages. If you use a plain text email system, e.g., Groupwise, enable html messages so that the link to the award document is active.
  - **Warning!** If you use a plain text e-mail system, e.g., Groupwise, when you forward an email sent from the eResearch system, the link is broken.
- Links into the eRPM system will be included in the e-mail to provide access to the actual grant and contract documents.
- When you start to use the eResearch Proposal Management (eRPM) system, you will be able to view award notifications right in eRPM.
- A sample PAC is broken into three sections below to demonstrate the changes. To view an example of the full PAC, go to the end of this document.

**Project Award Change – Section 1**

<b>From:</b>	eresearch@umich.edu		
<b>Sent:</b>	Wednesday, February 20, 2009 2:11 PM		
<b>To:</b>	investigator_pat@umich.edu, administrativecontacts@umich.edu, panpancontacts@umich.edu		
<b>Subject:</b>	PAC for F123456-2 (09-PAF12345) Investigator		
	<b>B1</b>	<b>B2</b>	<b>B3</b> <b>B4</b>
	Pat Investigator		
<b>UM Principal Investigator:</b>	Pat Investigator	<b>Date:</b>	2/20/09
<b>Unit (Department ID):</b>	Otorhinolaryngology Department (249000)		
<b>From DRDA Project Representative:</b>	DRDA Project Representative, 734-555-5555, drda_pr@umich.edu		
<b>DRDA Number:</b>	09-PAF12345		
<b>Notice ID:</b>	F123456-2		
<b>Project Title:</b>	Sample Project Title		

**A.** Notice that the sender is **eresearch.umich.edu**.

**Note:** If you use spam filters, please make a rule or exception so that you can receive emails from **eresearch.umich.edu**.

**B.** Email **Subject** includes:

1. **PAC**
2. **Notice ID**  
PGN-1 (any number higher than 0 is a PAC number)  
e.g., F123456-2
3. **(DRDA Number)**  
e.g., (09-PAF12345)
4. **UM Principal Investigator Last Name**  
e.g., Investigator

**Project Award Change – Section 1 (continued)**

<b>From:</b>	eresearch@umich.edu	
<b>Sent:</b>	Wednesday, February 20, 2009 2:11 PM	
<b>To:</b>	investigator_pat@umich.edu, administrativecontacts@umich.edu, panpancontacts@umich.edu	
<b>Subject:</b>	PAC for F123456-2 (09-PAF12345) Investigator	
<b>Project Award Change - Administrative</b>		
DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED		
<b>C</b> <b>UM Principal Investigator:</b>	Pat Investigator	<b>Date:</b> 2/20/09
<b>D</b> <b>Unit (Department ID):</b>	Otorhinolaryngology Department (249000)	
<b>E</b> <b>From DRDA Project Representative:</b>	DRDA Project Representative, 734-555-5555, drda_pr@umich.edu	
<b>F</b> <b>DRDA Number:</b>	09-PAF12345	
<b>G</b> <b>Notice ID:</b>	F123456-2	
<b>H</b> <b>Project Title:</b>	Sample Project Title	

- C.** UM Principal Investigator who received the award and date when processed.
- D.** Administrative Home for the project.
- E.** DRDA Project Representative contact for the award.
- F.** 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

**G. Notice ID**

- Format:  
Project grant number (PGN) – 2 (any number higher than 0 is a PAC number)  
e.g., F123456-2
- 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
- Notice ID appears here and in the e-mail subject.

**H. Project Title**

**Project Award Change – Section 2**

<b>I</b>	<b>Sponsors:</b>			
	PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type
	NSF	909300	National Science Foundation	Direct
	<b>Direct Sponsor Award Reference Number:</b>			
<b>Prime Sponsor Award Reference Number:</b>				
<b>CFDA Number:</b> There are no items to display				
<b>J</b>	<b>PGN No:</b>			
	PGN	Short Cd	CS Short Cd	Parent?
<b>K</b>	F123456			
	yes			
<b>L</b>	<b>Class No:</b> On-Campus Research (22000)			
	<b>Project Period Estimated Award:</b> \$552,000.00		<b>Project Period:</b> 3/09/2009 to 2/22/2010	
<b>M</b>	<b>Award Documents:</b>			
	Name			Version
				Award_Document.doc
				0.01

- I. Sponsor information
- J. Project Grant information
- K. Class code
- L. Project period estimated award
- M. Award document link

**Award Document Notes:**

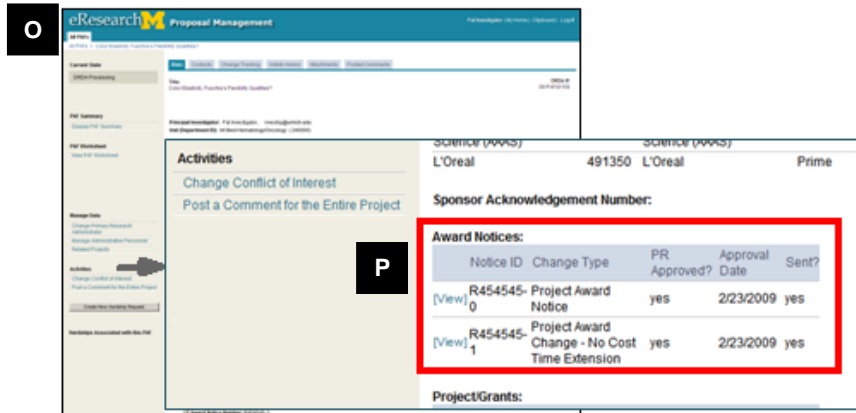
- You will be prompted to login with your Kerberos ID to download a full copy of the award document.
- You will also be able to view award documents in the eRPM system (when you start using the system).
- **Warning!** If you are a plain text email system user, even if you turn on view html messages, if you forward this message you will break this link. To view award, you can login to eRPM and find the award in the system.
- **Warning!** Forwarding a message to someone does NOT give them access to view it in eResearch. He/she must be listed on the project or be a Reviewer to have access to view the award in eResearch.
- **Important!** If you are a plain text email system user (e.g., Groupwise), you must enable view html messages for this link to work.
- **Warning!** You cannot copy the Award document link and paste it into a web browser. It will not work.

**Project Award Change – Section 3**

<b>N</b>	Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555, amandaadmin@umich.edu
	***The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.
<p><b>The University Of Michigan</b>  <b>Division of Research Development and Administration</b>  <b>1056 Wolverine Tower</b></p>	

- N. Financial Operations Project/Grant Coordinator

Project Workspace



- O. Once you start to use eResearch Proposal Management, you can access your project workspaces via your Home Workspace.
- P. You will be able to view all award notices on the project workspace.





**From:** eresearch@umich.edu  
**Sent:** Wednesday, February 20, 2009 2:11 PM  
**To:** [investigator\\_pat@umich.edu](mailto:investigator_pat@umich.edu), [administrativecontacts@umich.edu](mailto:administrativecontacts@umich.edu), [panpancontacts@umich.edu](mailto:panpancontacts@umich.edu)  
**Subject:** PAC for F123456-2 (09-PAF12345) Investigator

**Project Award Change - Administrative**

DO NOT REPLY TO THIS MESSAGE. NO eRESEARCH ACTION REQUIRED

**UM Principal Investigator:** Pat Investigator **Date:** 2/20/09

**Unit (Department ID):** Otorhinolaryngology Department (249000)

**From DRDA Project Representative:** DRDA Project Representative, 734-555-5555, [drda\\_pr@umich.edu](mailto:drda_pr@umich.edu)

**DRDA Number:** 09-PAF12345

**Notice ID:** F123456-2

**Project Title:** Sample Project Title

**Sponsors:**

PAF Sponsor Name	Sponsor ID	Official Sponsor Name	Sponsor Type
NSF	909300	National Science Foundation	Direct

**Direct Sponsor Award Reference Number:**

**Prime Sponsor Award Reference Number:**

**CFDA Number:**  
There are no items to display

**PGN No:**

PGN	Short Cd	CS Short Cd	Parent?
F123456			yes

**Class No:** On-Campus Research (22000)

**Project Period Estimated Award:** \$552,000.00 **Project Period:** 3/09/2009 to 2/22/2010

**Award Documents:**

Name	Version
------	---------

[Award Document.doc](#)

0.01

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Financial Operations Project/Grant Coordinator: Amanda Administrator, 734-555-5555,  
[amandaadmin@umich.edu](mailto:amandaadmin@umich.edu)

---

\*\*\*The Primary Post-Award Contact is the only person who will receive any M-Pathways generated documents. If you wish to change the recipient of these documents, please contact the Financial Operations Project/Grant Coordinator.

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**The University Of Michigan  
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1056 Wolverine Tower**



## Topic 15: Reviewer Section - Topics and Materials

### Reviewer Section Objectives:

By the end of this course, you will be able to use eResearch to review proposals and projects, make necessary changes, and submit approval where you have the appropriate permissions.

Section Topic	Materials	Page
<b>15. Introduction to Reviewer Course</b>		189
<b>16. Routing Logic and Reviews</b>		190
	Ready for Review (sample email)	191
	Manage Departments (step by step procedure)	192
<b>17. PAF Workspace and Reviewing a PAF</b>		199
	Reviewer PAF Workspace (field description) <i>in PI &amp; Project Team Section of Guide</i>	13
	View and Print a PAF Summary (step by step procedure) <i>in PI &amp; Project Team Section of Guide</i>	101
	Post a Comment to the Entire Project (step by step procedure) <i>in PI &amp; Project Team Section of Guide</i>	97
	Posted Comment for the Entire Project (sample email) <i>in PI &amp; Project Team Section of Guide</i>	99
<b>18. PAF Worksheet Changes During Unit Review</b>		200
	Reviewer Make or Request PAF Worksheet Changes (step by step procedure)	201
	Changes Made Email (sample email)	207
	View Change Details (step by step procedure) <i>in PI &amp; Project Team Section of Guide</i>	123
<b>19. Submitting Unit Approval &amp; Assigning Ad Hoc Reviewers</b>		208
	Unit Review and Approve	209
	Assign an Ad Hoc Reviewer (step by step procedure)	212
<b>20. Changes after Approval</b>		216
	Acknowledge Changes (step by step procedure)	217
	Suspend Approval (step by step procedure)	221
<b>21. eResearch Proposal Management Support and Additional Training</b>		225
	Email Notifications (reference document)	226
	Hardship – PI & Project Team (step by step procedure)	231
	Hardship – Reviewer (step by step procedure)	237

## Topic 16: Routing Logic and Reviews

For this section of the course, you need to switch hats to your Reviewer role. We start by examining the same routing table we saw as a PI & Project Team member when we routed for approval. Now we need to look at this from the perspective of a Reviewer in a department.

Individuals are set-up as Reviewers or Reviewers Who Can Sign (Approvers) for specific Department IDs. This section starts by examining the Reviewer Home Workspace & Manage Department Information (how departments are set-up in eResearch).

Goals:

Use the Home Workspace in order to find PAFs that need review, view PAF Workspace, and understand how the routing order is determined.

Objectives:

After completing this module, you will be able to:

- Use the PAF Workspace routing table to view routing and review order, and approval status.
- Locate the PAFs that require your review.
- Manage Department Information

<b>Materials</b>	<b>Page</b>
Ready for Review (sample email)	191
Manage Departments (step by step procedure)	192

## PAF Ready for Unit Review Email

The following is an example of an email notification generated by eRPM to alert a PAF Email Notification contact person that a PAF is ready for their unit to review and approve.

### Email Sample

**eResearch Action Required. Please do not reply to this message.**

The PAF referenced below requires your department's review and approval.

**PAF Information:**

**DRDA Number:** [09-PAF00085](#)

**PAF Title:** Hummingbird Metabolism as a Theoretical Model for Landfill Reduction

**PI:** Stephen Forrest

**Project Administrative Home:** School of Social Work

Primary Research Administrator: Jason Johnson

**Routed for Unit Review & Approval:** 11/14/2008 11:35 AM

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth

**Sponsor Deadline:** 11/20/2008

**Action Required:**

1. Click here to access the PAF: [09-PAF00085](#)

You may be prompted to login using your username and Kerberos password.

2. Click View PAF Summary to review PAF contents and supporting documents.

3. After review of PAF and proposal, click Unit Approve or Reviewer Request Changes.

**Recipients:**

This message was sent to the following:

Reese Reviewer

Arnold Approver

**Questions:**

1. Refer to [online help](#) for information on activities in eResearch.

2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM

Monday through Friday.

<http://www.eresearch.umich.edu/>



## Manage Department Information Review Access, Email Notifications, and Contacts for Proposal Questions

- Unit Liaisons (ULs) & Reviewers can manage department information for their assigned departments. They can:
  - Add department information: Page 2
  - Create Proposal Management Accounts: Page 6
  - Delete department information: Page 7

### Important Information



Refer to your Unit policy about who should Manage Department information.

- Some units may want the Research Unit Liaison to manage all of this information
- Some units may pick a point reviewer to manage this information
- Some units may ask individual reviewers to manage information, etc.

Contact your Research Unit Liaison for more information:

[http://www.umich.edu/~eresinfo/erpm/uls/ruls\\_list.html](http://www.umich.edu/~eresinfo/erpm/uls/ruls_list.html)



Information managed by a Reviewer or Research Unit Liaison for his/her assigned departments includes:

- **Reviewer**  
Person in Dept ID who can Review Proposals
- **Reviewer Who Can Sign**  
Person in Dept ID who can Approve (Review & Sign) Proposals  
**Important!** Can only be changed by Unit Liaison.
- **Department Contact**  
For Dept ID, Public Contact to Facilitate Proposal Preparation & Review Questions
- **Department PAF Notifiers**  
For Dept ID, person or email group who receives email notification when item such as a PAF or hardship is sent to their department for review.  
Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).
- **PAN/PAC Notifier**  
For Dept ID, person or email group who receives email notifications of new PAN/PACs after DRDA completes the Release Award Notification activity.  
Does not give user system access (e.g., Reviewer or Reviewer Who Can Sign Access).



If you need a new department added, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>.

Include:

- Name and Dept ID of the new department
- If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy

**ADD DEPARTMENT INFORMATION**

Add Reviewer, Reviewer Who Can Sign (only Unit Liaison Can Manage This), Contact for Proposal Questions, or Email Notifications.

**Unit Liaison - Home Workspace**

1. Go to: <http://eresearch.umich.edu/>, under Proposal Management click **Login**.
2. Login using your username & password.
3. Click on the correct role.  
Unit Liaisons, click **Unit Liaison** role.  
Reviewers, click **Reviewer** role.
4. If you are a Reviewer, click the **Manage Departments** Tab in your Home Workspace.

**Reviewer - Home Workspace**

5. Find the department that needs information managed. All the departments that you are assigned to are displayed.

**Tip:** Use **Filter by** to search for departments by ID (number) or name. Select a **Filter by** criteria, enter a keyword in the field, and click **Go**.

**Note:** If you cannot find a needed department, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html> .  
Include: Name and Dept ID of the department

Unit Liaison Home Workspace

The screenshot shows the eResearch Proposal Management interface. At the top, there is a navigation bar with the eResearch logo and 'Proposal Management' text. On the right of the navigation bar, there are links for 'My Home', 'Clipboard', and 'Logoff'. Below the navigation bar, there is a sidebar on the left with 'Roles' and 'Unit Liaison' listed. The main content area is titled 'Inbox' and contains two sections: 'Department Information in need of Review' and 'Manage Department Information'. The 'Department Information in need of Review' section contains a table with the following data:

Name	ID	Modified Date	Edit
LSA Study of Complex Systems	550400	March 27, 2008 12:37:19 PM EDT	<a href="#">Manage Department</a>

The 'Manage Department Information' section contains a filter bar with a dropdown menu set to 'Name', a search input field, and buttons for 'Go', 'Clear', and 'Advanced'. Below the filter bar is another table with the following data:

Name	ID	Edit
LSA Study of Complex Systems	550400	<a href="#">Manage Department</a>

A small black box with the number '6' is overlaid on the bottom right corner of the screenshot.

6. From your Home Workspace, click **Manage Department**

**Note:** Unit Liaisons have two sections **Department Information in need of Review** and **Management Department Information**. They can click Management Department from either section.

**Note:** Departments are in the **Department in need of Review** section if they have been newly added. They are put in this section to flag them for you so that you realize that they need review and department information added.

Manage Department Information

Manage Unit

**College of Lit, Science & Arts (170000)**

**7**

Dean Approval **IS** required.

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

Approval hierarchy: College of Lit, Science & Arts (170000)

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(s):

Unit Liaison	Department	Is Backup Unit Liaison
<b>8</b> Peggy Westrick	LSA Dean: Dean's Office	

Add Remove

Contact for Proposal Questions:

Person	Employer	Title
<b>9</b> <input type="checkbox"/> Contact Person	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> Contact Person	LSA Dean: Dean's Office	Executive Secretary

Reviewers Who Can Sign:

Person	Employer	Title
<input type="checkbox"/> Review	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> Review	LSA Dean: Dean's Office	Research Process Senior Manager

Add Remove

Reviewers:

Person	Employer	Title

PAF Email Notification:

Add

Person	Employer	Title
<input type="checkbox"/> Email Contact		

Add Remove

PAN/PAC Email Notification:

Person	Employer	Title
<input type="checkbox"/> Email Contact 1	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> Email Contact 2	LSA Dean: Dean's Office	Executive Secretary

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.

Note: If the user is not in the system, you may [Create A New User Account...](#)

OK Cancel

7. Verify the information about the department.

If changes are needed, contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>. Include:

- Name and Dept ID of the new department
- If there are higher level departments that department rolls-up to (reports to) in the routing hierarchy.

8. The Unit Liaisons for the department are listed.

To make changes contact the eResearch Proposal Management team via the Contact Us page: <http://www.umich.edu/~eresinfo/erpm/contact.html>.

9. To add a new **Contact for Proposal Questions, Reviewer, Reviewers Who Can Sign** (only ULs can edit this) **PAF Email Notification**, or **PAN/PAC Email Notification**, click **Add**.

Select One or More Persons



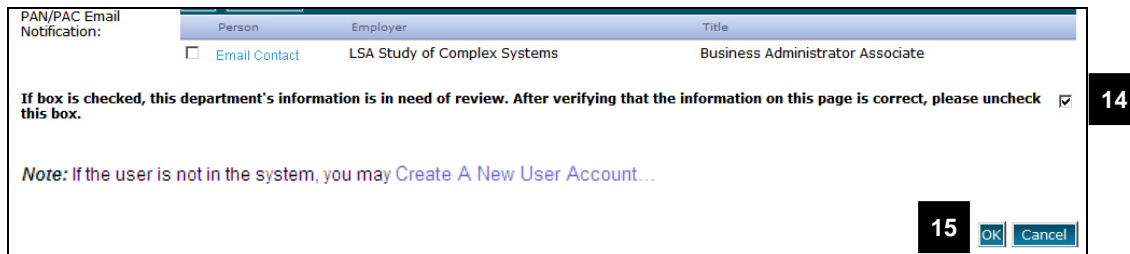
10. Select a **Filter by** criteria (e.g., Last) and enter a keyword (e.g., last name) in the field.

**Note:** Click Advanced to use multiple Filter by criteria.

11. Click **Go**.

12. Select the person to add.

13. Click **OK** to add the person and return to the Management Department Information page.



14. If you needed to verify information for this department and have completed your review, unselect this box so that it does not continue to appear in your **Department Information in need of Review** section of your Inbox.

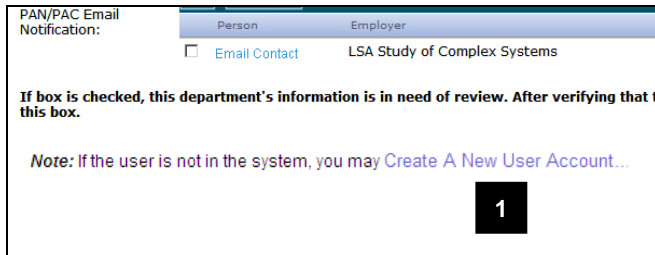
15. Click **OK** to save your work and return to your Home Workspace.

## CREATE PROPOSAL MANAGEMENT ACCOUNT

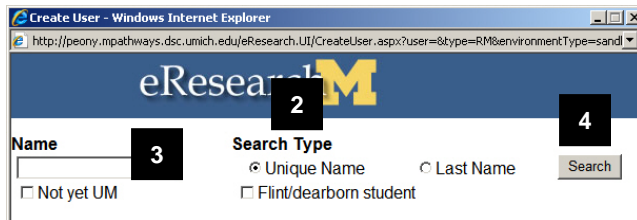
Many Proposal Management accounts have been pre-created. Accounts are automatically created the first time a person with a unique name & password logs into eResearch Proposal Management.

If you cannot find a person in the Proposal Management system when adding new information for your department, you may create a new user account.

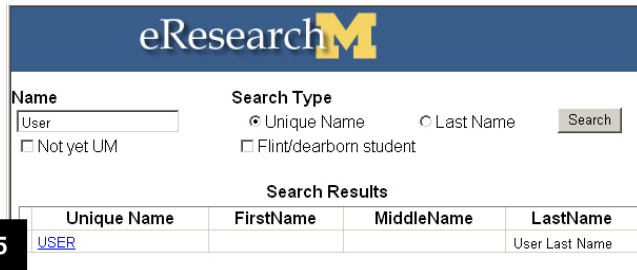
### Unit Liaison Manage Department Information



1. Click the **Create A New User Account...** link on the bottom of the **Manage Department Information** page.

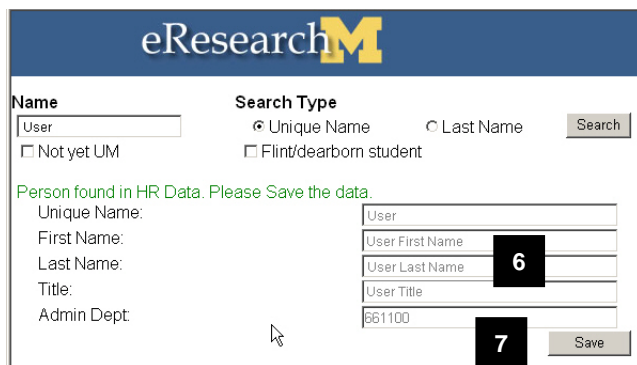


2. Select the search type.
3. Enter the last name or unique name.
4. Click **Search** to search for the person against the M-Pathways Human Resources data.

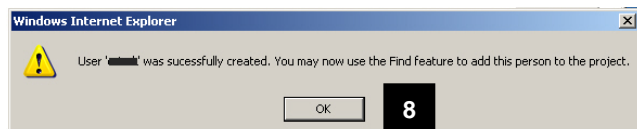


Unique Name	FirstName	MiddleName	LastName
<a href="#">USER</a>			User Last Name

5. Click the person's **Unique Name** to select person who needs an eResearch account created.



6. Verify that you have found the correct person.
7. Click **Save** to create an eResearch Proposal Management account for the person.



8. Click **OK** when the User Account Success creation message appears. You will now be able to find the person when managing department information.



**DELETE DEPARTMENT INFORMATION**

If a person should no longer be a Reviewer, Reviewer Who Can Sign, Contact for Proposal Questions, or Email Notification you can delete (remove) the person from your department information.

**Unit Liaison Manage Department Information**

Manage Unit

**College of Lit, Science & Arts (170000)**

Dean Approval **IS** required.

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

Approval hierarchy: College of Lit, Science & Arts (170000 )

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(s):

Unit Liaison	Department	Is Backup Unit Liaison
Peggy Westrick	LSA Dean: Dean's Office	
<input type="button" value="Add"/> <input type="button" value="Remove"/> <b>2</b>		

Contact for Proposal Questions:

Person	Employer	Title
<input type="checkbox"/> <a href="#">Contact Person</a>	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> <a href="#">Contact Person</a>	LSA Dean: Dean's Office	Executive Secretary

**1**

Reviewers Who Can Sign:

Person	Employer	Title
<input type="checkbox"/> <a href="#">Review</a>	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> <a href="#">Review</a>	LSA Dean: Dean's Office	Research Process Senior Manager

Reviewers:

Person	Employer	Title
--------	----------	-------

PAF Email Notification:

Person	Employer	Title
<input type="button" value="Add"/>		
<input type="checkbox"/> <a href="#">Email Contact</a>		
<input type="button" value="Add"/> <input type="button" value="Remove"/>		

PAN/PAC Email Notification:

Person	Employer	Title
<input type="checkbox"/> <a href="#">Email Contact 1</a>	LSA Dean: Dean's Office	Admin Coord/Project Coord
<input type="checkbox"/> <a href="#">Email Contact 2</a>	LSA Dean: Dean's Office	Executive Secretary

If this box is checked, this department's information is in need of review. After verifying that the information on this page is correct, please uncheck this box.

Note: If the user is not in the system, you may [Create A New User Account...](#)

**3**

1. To delete a person, select the person
2. Click **Remove**.
3. Click **OK** to save the changes made.

**Topic 17: PAF Workspace and Reviewing a PAF**

Goals:

Develop a familiarity with what information is contained in the PAF Workspace and how to retrieve information for the review.

Objectives:

After completing this module, you will be able to:

- Retrieve PAF information by using the PAF workspace.
- Open the PAF Summary and attached documents.
- Print the PAF Summary and attached documents.
- Add Unit Comments viewable to just a specific department.
- Understand that comments posted using the Post a Comment activity are viewable to the entire project.

<b>Materials</b>	<b>Page</b>
PAF Workspace (field description)	13
View and Print a PAF Summary (step by step procedure)	101
Post a Comment to the Entire Project (step by step procedure)	97
Posted Comment for the Entire Project (sample email)	99

## Topic 18: PAF Worksheet Changes During Unit Review

### Goals/Outcomes

Practice making changes and requesting changes, and to interpret change log details for further information.

### Objectives:

After completing this module, you will be able to:

- Make and Submit PAF Changes.
- Understand that as a Reviewer you can also view and interpret Change Logs.
- Request that the Project Team Make Changes.

<b>Materials</b>	<b>Page</b>
Reviewer Make or Request PAF Worksheet Changes (step by step procedure)	201
Changes Made Email (sample email)	207
View Change Details (step by step procedure)	123

## PAF Changes

In the state of Unit Review, a Reviewer or a Reviewer Who Can Sign (Approver) can make and submit their own changes or request that the project team make and submit the changes.

When a Reviewer submits a change, a notification is sent the Principal Investigator (PI), Primary Research Administrator, and the email notification contact for departments who have already approved the PAF.

When a Reviewer requests a change, a notification is sent the PI and Primary Research Administrator.

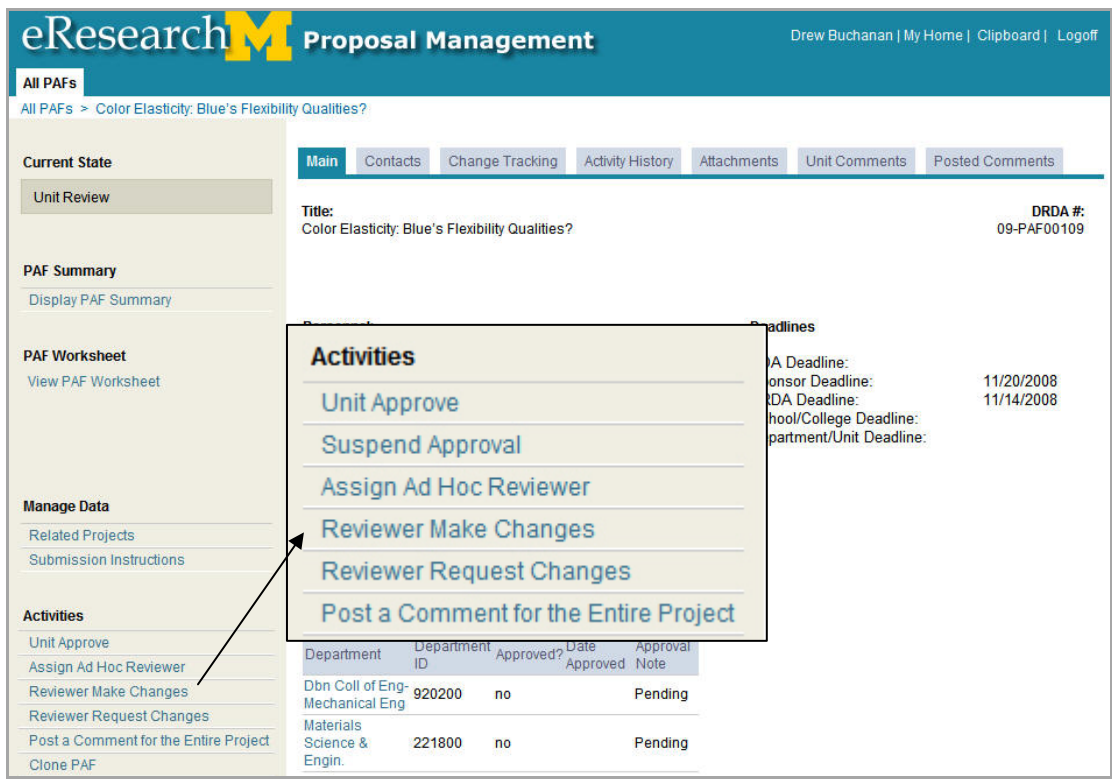
**Important!** When a reviewer requests a change from a PI/Project Team, that department cannot approve the proposal until the PI/Project Team submits the change.

**Note:** If you cannot locate the PAF:

- Make sure that you viewing the correct workspace by looking for the bolded role title under **My Roles**.
- Click the **Upcoming** tab. Any PAFs that will require your review but have not yet moved to your Inbox are located under this tab.
- Click on **All PAFs** and find the PAF. Refer to the *Find PAFs Step by Step Procedure* for more information on how to use the Filter by function.

### REVIEWER MAKE CHANGES AND SUBMIT CHANGES

#### PAF Workspace Main tab



The screenshot shows the 'All PAFs' page for 'Color Elasticity: Blue's Flexibility Qualities?'. The 'Activities' list includes:

- Unit Approve
- Suspend Approval
- Assign Ad Hoc Reviewer
- Reviewer Make Changes** (highlighted with an arrow)
- Reviewer Request Changes
- Post a Comment for the Entire Project

Department	Department ID	Approved?	Date Approved	Approval Note
Dbn Coll of Eng-Mechanical Eng	920200	no		Pending
Materials Science & Engin.	221800	no		Pending

1

1. Click the **Reviewer Make Changes** activity from the PAF Workspace.

### Make Changes Window

Reviewer Make Changes

**Color Elasticity: Blue's Flexibility Qualities? (09-PAF00109)**

Listed below are the pending departments for which you are a reviewer. Select the departments your changes will impact. Enter comments in the text box (optional). Click OK to put this PAF into an editable state. Click CANCEL to cancel this activity and close this window.

ID	Name	Associated Sections in This PAF
<input checked="" type="checkbox"/> 920200	Dbn Coll of Eng-Mechanical Eng	Space

Comments:

OK Cancel

2. Select the departments that your changes will impact.
3. Strongly recommended, enter **Comments** about the changes you a planning to make.
4. Click **OK** to return to the PAF Workspace.

**Note:** The PAF is moved to the state of Reviewer Making Changes.

### PAF Worksheet Main tab



The screenshot shows the 'PAF Worksheet Main tab' interface. On the left, there is a sidebar with a 'PAF Worksheet' link highlighted by a black box with the number 5. The main content area shows the title 'Color Elasticity: Blue's Flexibility Qualities?' and various tabs like 'Main', 'Contacts', 'Change Tracking', etc. Below the tabs, there is a 'Personnel' section listing Stephen Forrest as the UM Principal Investigator and Kelly Dr as the Primary Research Administrator. A 'Deadlines' section lists FOA, Sponsor, DRDA, and School/College deadlines.

5. Click the **Edit PAF Worksheet** link from the PAF Workspace to make changes.

**Note:** Make sure you click Save on each page you change in the PAF Worksheet.

**REVIEWER MAKE CHANGES AND SUBMIT CHANGES, cont.**

**PAF Workspace Main tab**

6. Click **Submit Changes** activity from the PAF Workspace.

**Note:** Changes will not be written to the PAF & viewed by everyone else with access to the PAF (e.g., project team, other Reviewers & DRDA) until they are submitted.



**Submit Changes Window**

**Color Elasticity: Blue's Flexibility Qualities? (09-PAF00109)**

Enter comments in the text box (required).  
Click OK to submit your changes to the PAF.  
Click CANCEL to cancel this activity and close this window.

---

Please select the department(s) for which you are submitting these changes.

Below is the list of departments for which reviewers are making changes. Please place a check next to the departments to which you are submitting changes.

ID	Name	Associated Sections in This PAF
<input checked="" type="checkbox"/> 920200	Dbn Coll of Eng-Mechanical Eng	Space

\*Change Type:

- Budget or Budget Justification
- Cost Sharing
- Key Personnel
- Space/Resources
- Typos
- Research
- Other
- No Changes Made

\*Comments:

The room number of the PI lab space changed.

**9**

7. Select the department(s) on behalf of which you made changes.

8. Select a Change Type.

9. Enter **Comments** describing the changes made.

**Note:** The comments that you enter on this activity are included in the email notification sent PI, Primary Research Administrator, and any Reviewers who have already approved the PAF.

10. Click **OK**.

**Note:** The PAF is returned to the state of Unit Review.

REVIEWER REQUEST CHANGES

PAF Workspace Main tab

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes the user name 'Drew Buchanan' and links for 'My Home', 'Clipboard', and 'Logoff'. The main content area is titled 'All PAFs' and shows the current PAF: 'Color Elasticity: Blue's Flexibility Qualities?'. The 'Current State' section shows 'Unit Review'. The 'PAF Summary' section has a 'Display PAF Summary' link. The 'PAF Worksheet' section has a 'View PAF Worksheet' link. The 'Manage Data' section includes 'Related Projects' and 'Submission Instructions'. The 'Activities' section lists several actions: 'Unit Approve', 'Assign Ad Hoc Reviewer', 'Reviewer Make Changes', 'Reviewer Request Changes', 'Post a Comment for the Entire Project', and 'Clone PAF'. An arrow points to the 'Reviewer Request Changes' activity. The 'Personnel' section shows 'Stephen' as 'UM Principal' with contact information. The 'Deadlines' section shows several dates: '11/20/2008', '11/14/2008', and '11/14/2008'. A table at the bottom shows project details for 'Dbrn Coll of Eng-Mechanical Eng' and 'Materials Science & Engin.' with columns for ID, status, and 'Pending'.

1

1. Click the **Reviewer Request Changes** activity from the PAF Workspace.

**Request Changes**

Reviewer Request Changes

**Color Elasticity: Blue's Flexibility Qualities? (09-PAF00109)**

Describe and/or upload the changes you want the Project Team to make to the PAF. Click OK to save your request and notify the Project Team. Select CANCEL to cancel this activity. Neither this activity or a response from the Project Team constitutes an approval. Approvals are only issued via the Unit Approve activity.

Select the departments on whose behalf you are request changes from the project team.

ID	Name	Associated Sections in This PAF
<input checked="" type="checkbox"/> 920200	Dbn Coll of Eng-Mechanical Eng	Space

\* Comments: Please adjust the budget rate by 1.5% and upload revised budget documents.]

Documents:

name	description
There are no items to display	

**5**

2. Select the departments on behalf of which you are requesting changes from the project team.

3. Enter **Comments** explaining the change requested.

**Note:** The comments that you enter on this activity are included in the email notification sent to the PI and Primary Research Administrator.

4. Optional, **Add** Documents.

5. Click **OK**.

**Note:** This activity moves the PAF into the state of Unit Review-Project Team Making Changes. The PAF is now only editable by personnel listed on the PAF with edit rights. Once the changes have been submitted, the requesting department is able to continue the review and approval process.

## Changes Made Email

The following is an example of an email notification generated by eRPM to alert PAF Email Notification contact persons in the Units who have already submitted approval that changes were made to a PAF.

### Email Sample

**This is for information only. No action required.**

The Project Team has made changes to the PAF referenced below.  
You will be notified if further action is required.

**Comments:**

I've attached the cost share approval

**PAF Information:**

**DRDA Number:** [09-PAF00084](#)

**PAF Title:** Iforsyth\_Mice Metabolism as a Theoretical Model for Landfill Reduction

**PI:** Stephen Forrest

**Project Administrative Home:** 216100 COE EECS - ECE Division

**Primary Research Administrator:** Jason Johnson

**Routed for Unit Review & Approval:** 11/14/2008

**Direct Sponsor:** Research Institute of Innovative Technology for the Earth

**Sponsor Deadline:** 11/20/2008

**Click here to access the PAF:** [09-PAF00084](#)

**Recipients**

This message was sent to the following:

Arnold Approver

**Questions:**

1. Refer to [online help](#) for information on activities in eResearch.
2. If you have technical problems with eResearch, contact the MAIS Help Desk by calling (734) 936-7000, option 6, between 8 AM and 5 PM Monday through Friday.

<http://www.eresearch.umich.edu/>

**Topic 19: Submitting Unit Approval & Assigning Ad Hoc Reviewers**

Goals/Outcomes:

Gain an understanding of the impact of assigning an ad hoc reviewer and how unit approval is submitted.

Objectives:

After completing this module, you will be able to:

- Identify that only a Reviewer Who Can Sign can approve.
- Submit Approval.
- Assign an Ad Hoc Reviewer.
  - Understand that an Ad Hoc reviewer does not have formal approver rights for a department, but can post a Review Comment or Project Team comment.

<b>Materials</b>	<b>Page</b>
Unit Review and Approve (step by step procedure)	209
Assign an Ad Hoc Reviewer (step by step procedure)	212

## Unit Review and Approve

When a PAF moves from Proposal Preparation into the state of Unit Review, each Reviewer can access that PAF from their Home Workspace.

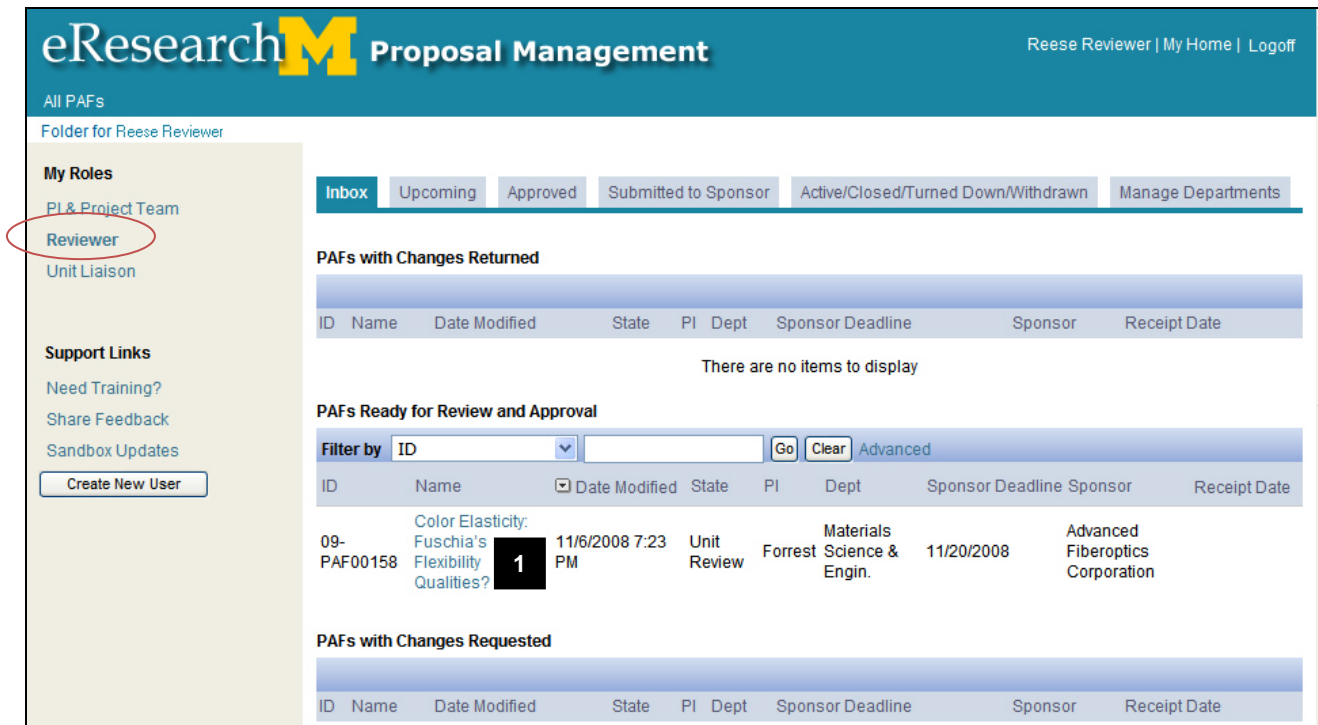
You will receive an email with a link to the PAF if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the *Login to eResearch Proposal Management Step by Step Procedure*.

**Who Can Approve the PAF:** In order to approve a PAF for a department, you must have **Reviewer Who Can Sign** access. If you have **Reviewer** access you can see that PAF that needs to be reviewed, but you cannot approve.

For more information about how your Department is set-up, see the **Manage Departments** tab or contact your Research Unit Liaison.

### Reviewer Home Workspace Inbox tab



The screenshot shows the eResearchM Proposal Management interface. In the left sidebar, under 'My Roles', the 'Reviewer' role is selected and circled in red. The main workspace has the 'Inbox' tab selected. Below the tabs, there are sections for 'PAFs with Changes Returned' (empty), 'PAFs Ready for Review and Approval' (containing one item), and 'PAFs with Changes Requested' (empty). The 'PAFs Ready for Review and Approval' section includes a table with the following data:

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor	Receipt Date
09-PAF00158	Color Elasticity: Fuschia's Flexibility Qualities?	11/6/2008 7:23 PM	Unit Review	Forrest	Materials Science & Engin.	11/20/2008	Advanced Fiberoptics Corporation	

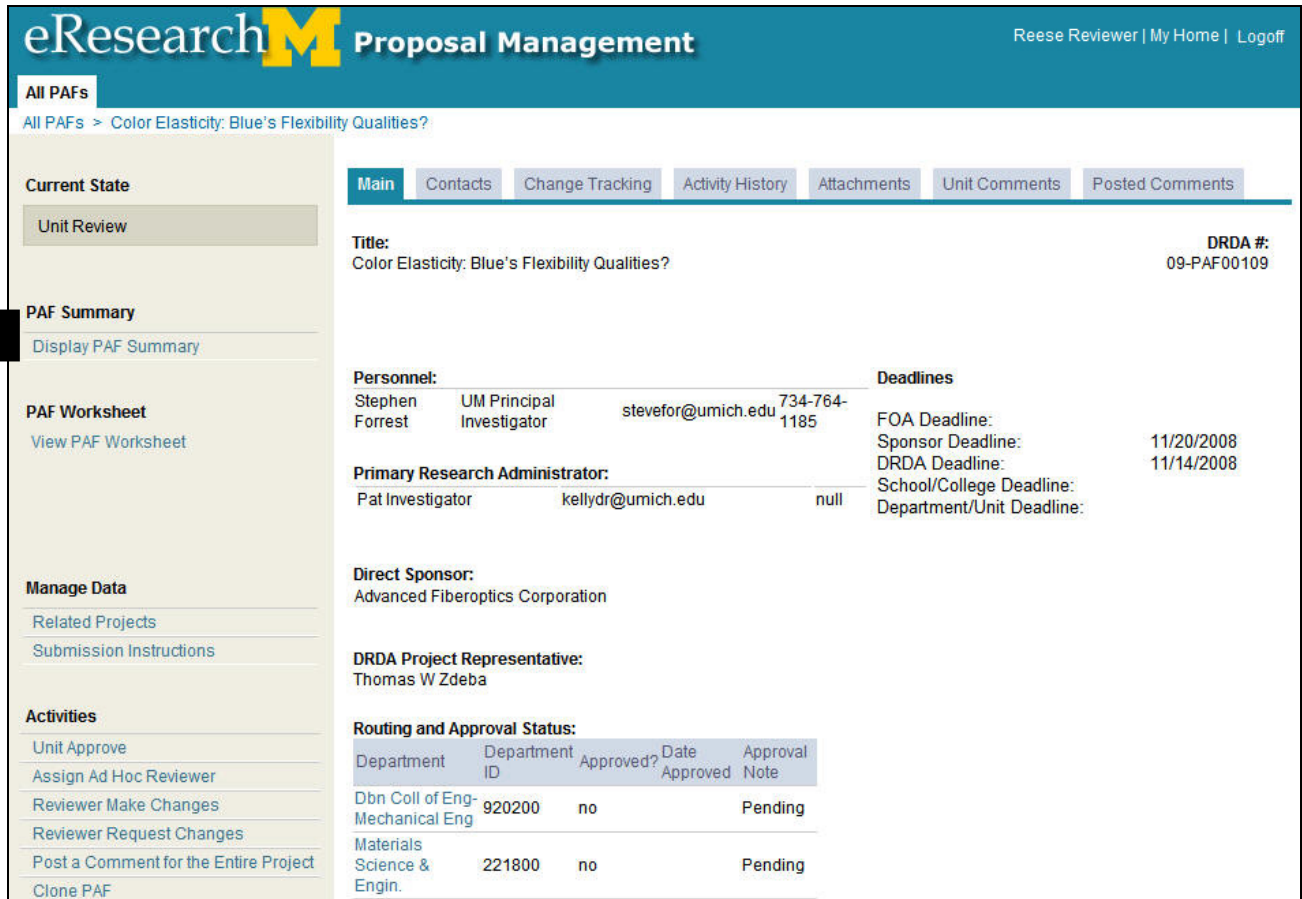
1. Click on the PAF Name to open the PAF Workspace.

**Note:** If you cannot locate the PAF:

- Make sure that you viewing the correct workspace by looking for the bolded role title under **My Roles**.
- Click the **Upcoming** tab. Any PAFs that will require your review but have not yet moved to your Inbox are located under this tab.
- Click on **All PAFs** and find the PAF. Refer to the *Find PAFs Step by Step Procedure* for more information on how to use the Filter by function.



PAF Workspace



**2** [Display PAF Summary](#)

**Current State**  
Unit Review

**PAF Summary**  
Display PAF Summary

**PAF Worksheet**  
View PAF Worksheet

**Manage Data**  
Related Projects  
Submission Instructions

**Activities**  
Unit Approve  
Assign Ad Hoc Reviewer  
Reviewer Make Changes  
Reviewer Request Changes  
Post a Comment for the Entire Project  
Clone PAF

**Title:**  
Color Elasticity: Blue's Flexibility Qualities? **DRDA #:**  
09-PAF00109

**Personnel:**  
Stephen UM Principal Investigator stevefor@umich.edu 734-764-1185

**Primary Research Administrator:**  
Pat Investigator kellydr@umich.edu null

**Direct Sponsor:**  
Advanced Fiberoptics Corporation

**DRDA Project Representative:**  
Thomas W Zdeba

**Deadlines**  
FOA Deadline:  
Sponsor Deadline: 11/20/2008  
DRDA Deadline: 11/14/2008  
School/College Deadline:  
Department/Unit Deadline:

**Routing and Approval Status:**

Department	Department ID	Approved?	Date Approved	Approval Note
Dbn Coll of Eng-Mechanical Eng	920200	no		Pending
Materials Science & Engin.	221800	no		Pending

2. Click **Display PAF Summary**.

**Note:** You can submit your unit approval or request that the project team make changes either:

- Directly on the PAF Summary.
- By returning here to the PAF Workspace using the **Unit Approve** or the **Reviewer Request Changes** activities.

PAF Summary end of page



If the Unit Approve button is not displayed, the following reasons may be the cause:

- The PAF is in the state of Unit Review-Project Team Making Changes. When the project team submits their changes, the state is returned to Unit Review and the Unit Approve button will be available.
- You may not have the appropriate permissions as a signer. Contact your Unit Liaison regarding your account.

If you have completed your review and are ready to submit your approval,

3. Click **Unit Approve**.

3a. Select the department(s) for which you are granting approval

3b. Optional, enter **Comments**.

3c. Click **OK**.

If you identify changes that you would like the project team to make,

4. Click **Request Changes**.

4a. Select the departments on behalf of which you are requesting changes from the project team.

4b. Optional, enter **Comments**.

**Note:** Comments entered on this activity are included in the email notification sent to the PI and Primary Research Administrator.

4c. Optional, **Add Documents**. Refer to the *Attach Documents Step by Step Procedure* for more information on working with documents.

4d. Click **OK**.

## Assign an Ad Hoc Reviewer

Based on the information provided in the PAF, the system determines which units the PAF and proposal package should be routed. The Unit Reviewers can send a PAF to a person who has not been previously designated as a Reviewer. Anyone who has an account in the system can be added as an Ad Hoc Reviewer.

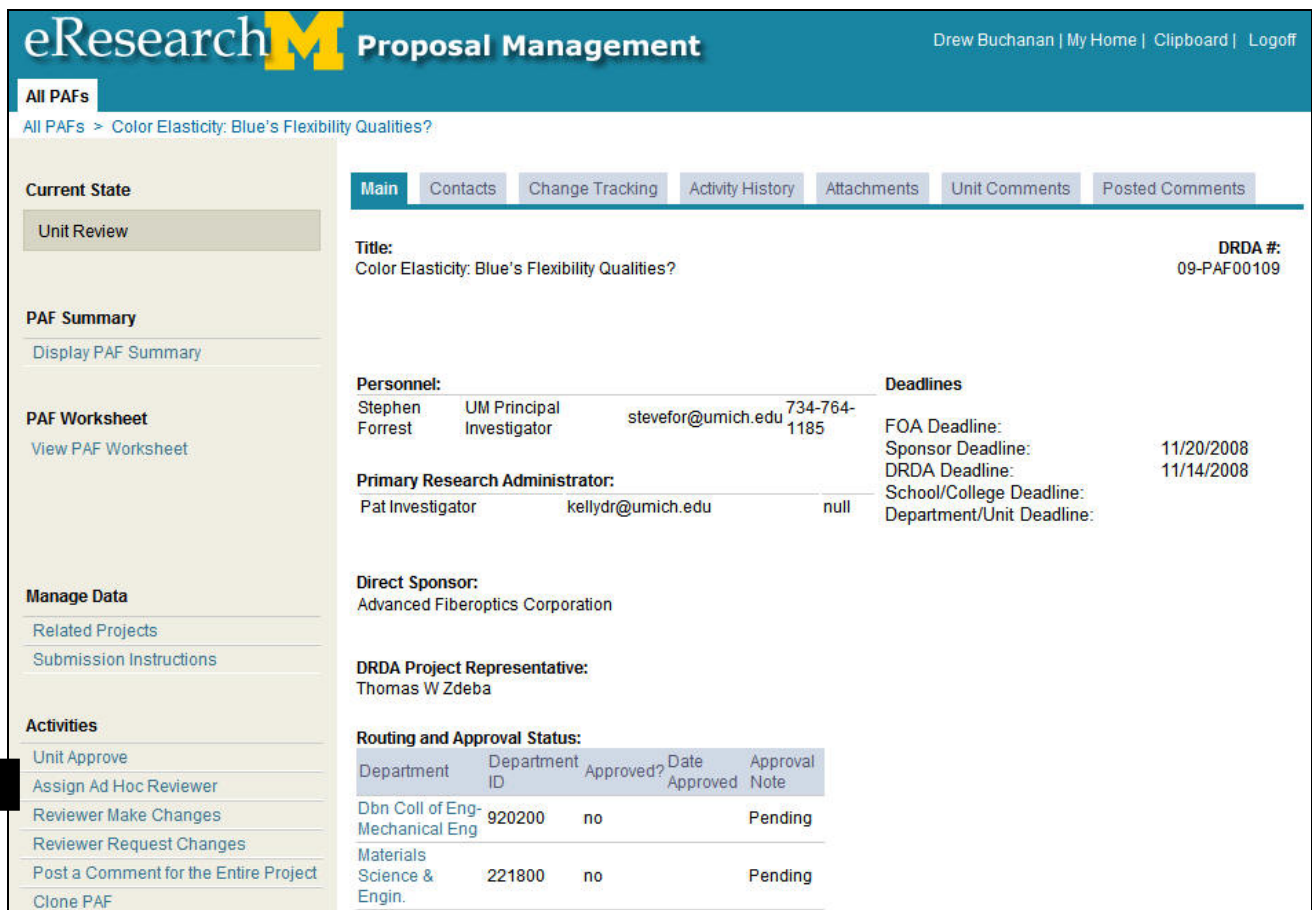
**Who Can Assign Ad Hoc Reviewers:** For a department, anyone with **Reviewer** or **Reviewer Who Can Sign** access can assign ad hoc reviewers.

Contact your Research Unit Liaison if you need **Reviewer** or **Reviewer Who Can Sign** access.

### Important Information

- Ad Hoc Reviewers are given access to view and enter their review comments on the PAF. They are to use the Post Reviewer Comment activity.
- Ad Hoc Reviewers are not able to “approve” the PAF. This remains the responsibility of the Reviewers listed on the PAF.

### PAF Workspace Main tab



**Routing and Approval Status:**

Department	Department ID	Approved?	Date Approved	Approval Note
Dbn Coll of Eng-Mechanical Eng	920200	no		Pending
Materials Science & Engin.	221800	no		Pending

1. Click the **Assign Ad Hoc Reviewer** activity from the PAF Workspace.

**Assign Ad Hoc Reviewer window**

Assign Ad Hoc Reviewer

**Color Elasticity: Blue's Flexibility Qualities?(09-PAF00109)**

Click the Add button to invite one or more individuals to complete an ad hoc review of this proposal. Each individual will receive an email that includes a link to the study and the comments that you enter below. To remove an individual from the list, select the checkbox in front of their name and click Remove. Click OK to complete this activity. Click CANCEL to cancel this activity and close this window.

\* Ad Hoc Reviewers: **2**

First Name	Middle Name	Last Name	Username
There are no items to display			

Comments:

2. Click **Add**.

**Select One or More Persons window**

Select One or More Per **3** **4** **5**

Filter by Last     **6**

Total Selected: 1  1-25 of 44

<input type="checkbox"/>	Last	First	Organization	Organization ID
<input type="checkbox"/>	Hakim	Mark	Internal Medicine Department	237000
<input type="checkbox"/>	Hakimi	Monica	Law School	410000
<input type="checkbox"/>	Kim	Jinsang	Materials Science & Engin.	221800
<input type="checkbox"/>	Kim	Shelley	Pediatric & Comm Diseases Dept	252000
<input type="checkbox"/>	Kim	Taehyung	Dbn Col of Eng-Electric & Comp	920400
<input type="checkbox"/>	Kim	Scott	Psychiatry Department	260000
<input type="checkbox"/>	Kim	Jong-Jin	Coll of Arch & Urban Planning	372100
<input type="checkbox"/>	Kim	Julee	LSA Mathematics	183000
<input type="checkbox"/>	Kim	Wonsuk	Dbn Coll of Eng-Mechanical Eng	920200
<input type="checkbox"/>	Kim	Clara	Internal Medicine Department	237000
<input checked="" type="checkbox"/>	Kim	Inchul	Dbn Coll of Eng-Mechanical Eng	920200
<input type="checkbox"/>	Kim	Boklye	Radiology Department	301000
<input type="checkbox"/>	Kim	Grace	Dbn CASL-Social Sciences	921400
<input type="checkbox"/>	Kim	Jennifer	Otorhinolaryngology Department	249000

Total Selected: 1  1-25 of 44

**7**   **8**

3. Select the **Filter by** criteria.

**Note:** **User ID** is the uniqaune, **Project ID** is the DRDA (PAF) number.

4. Enter a keyword.

**Tip:** Use percent sign (%) as a wildcard character in filtering to specify parts of words. For example, searching for %kim% returns Hakim, Kim and Kimball.

5. Click **Go** to display the search results.

6. Click **Advanced** to allow 2 more **Filter by** criteria.

7. Select the Ad Hoc Reviewer you want to assign.

8. Click **OK**.

### Assign Ad Hoc Reviewer

Assign Ad Hoc Reviewer

**Color Elasticity: Blue's Flexibility Qualities?(09-PAF00109)**

Click the Add button to invite one or more individuals to complete an ad hoc review of this proposal. Each individual will receive an email that includes a link to the study and the comments that you enter below. To remove an individual from the list, select the checkbox in front of their name and click Remove. Click OK to complete this activity. Click CANCEL to cancel this activity and close this window.

**9**

\* Ad Hoc Reviewers:

First Name	Middle Name	Last Name	Username
<input type="checkbox"/> Inchul		Kim	inkim

Comments:

**10**

**11**

9. To **Add** additional ad hoc reviewers, repeat steps 3 through 7.

10. Add **Comments**.



These comments will be included in the email that is sent from eResearch to each Ad Hoc Reviewer.

11. Click **OK**.



Email sent to Ad Hoc Reviewer

From: [ereseach@umich.edu](mailto:ereseach@umich.edu)  
To: [ereseachpm-test@umich.edu](mailto:ereseachpm-test@umich.edu)  
Cc:  
Subject: You have been assigned as an Ad Hoc Reviewer on a PAF

**eResearch Action Required. Please do not reply to this message.**

You have been assigned as an Ad Hoc Reviewer on the PAF referenced below.

**Comments:**  
Please review the lab space that is allocated to the PI.  
It is in your department and I would like you to check on the availability

**PAF Information:**  
**DRDA Number:** [09-PAF00769](#)  
**PAF Title:** (Marten) Turkish coffee and the effect on bunion reduction in males  
**PI:** Pat Investigator  
**Other Key Personnel:**

Conrad Investigator

**Project Administrative Home:** 227000 Nuclear Eng & Radiological Sci  
**Primary Research Administrator:** R. Research Administrator

**Routed for Unit Review and Approval:** 2/3/2009  
**Direct Sponsor:** Department of Energy  
**Sponsor Deadline:** 5/1/2009

**Action Required:**  
1. Click here to access the PAF: [09-PAF00769](#)  
You may be prompted to login using your unqiename and Kerberos password.  
2. Click Vew PAF Summary to review PAF contents and supporting documents.  
3. After review of PAF and proposal, click Post Reviewer Comment.

Notice that comments are included at the beginning of the email. Your comments provide necessary information as to what you need the reviewer to do.

When the ad hoc reviewer clicks on the link to the PAF, the PAF Workspace opens with a limited number of activities that are available to ad hoc reviewers.



## Topic 20: Changes After Approval

Goal/outcome:

Identify the impact of changes after you have submitted approval, and take action where needed.

Objectives:

After completing this module, you will be able to:

- Acknowledge a Change.
- Suspend Approval.

<b>Materials</b>	<b>Page</b>
Acknowledge Changes (step by step procedure)	217
Suspend Approval (step by step procedure)	221

## Acknowledge Changes

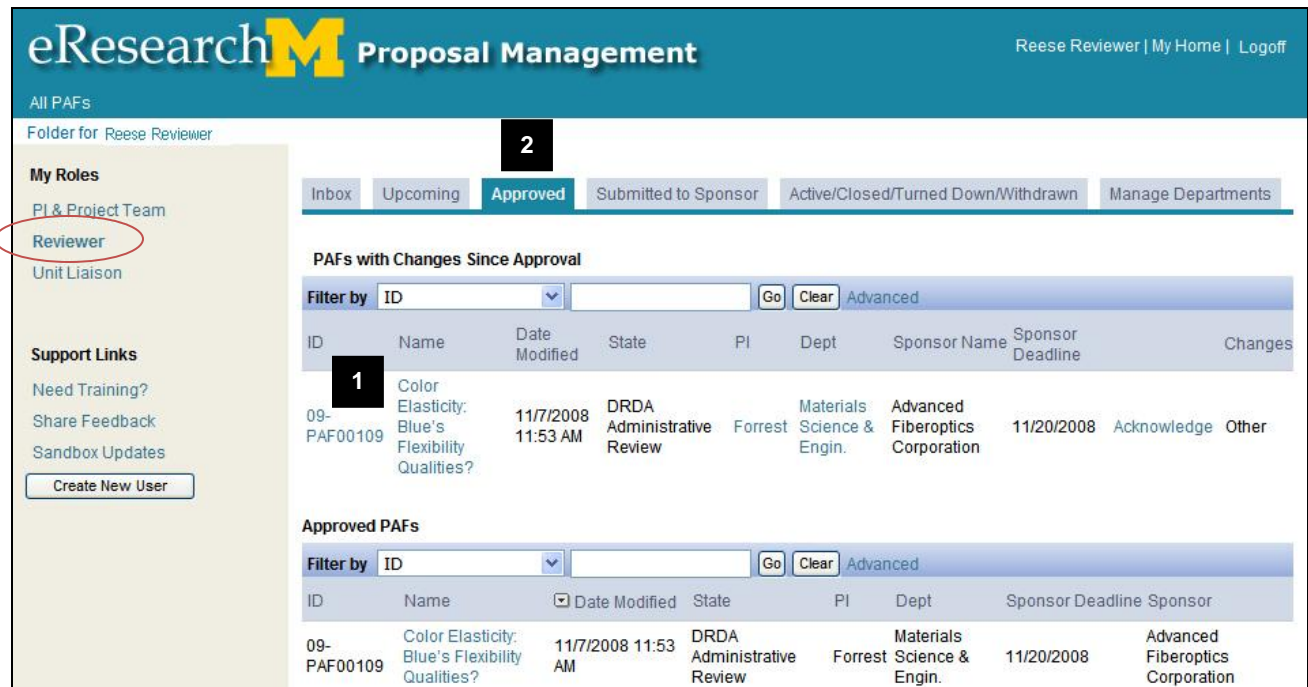
Acknowledge is used to confirm that you are aware of the PAF changes have been made after your approval, and that you do not wish to suspend your prior approval.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the *Login to eResearch Proposal Management Step by Step Procedure*.

You will receive an email notification regarding the change *only* if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

### REVIEW CHANGES (PAF Changes Since Approval)

#### Reviewer Home Workspace Approved tab



The screenshot shows the eResearchM Proposal Management interface. On the left, under 'My Roles', the 'Reviewer' role is circled in red. The main content area shows the 'Approved' tab selected. A table titled 'PAFs with Changes Since Approval' contains the following data:

ID	Name	Date Modified	State	PI	Dept	Sponsor Name	Sponsor Deadline	Changes
09-PAF00109	Color Elasticity: Blue's Flexibility Qualities?	11/7/2008 11:53 AM	DRDA Administrative Review	Forrest	Materials Science & Engin.	Advanced Fiberoptics Corporation	11/20/2008	Acknowledge Other

Below this table is another section for 'Approved PAFs' with a similar table structure.

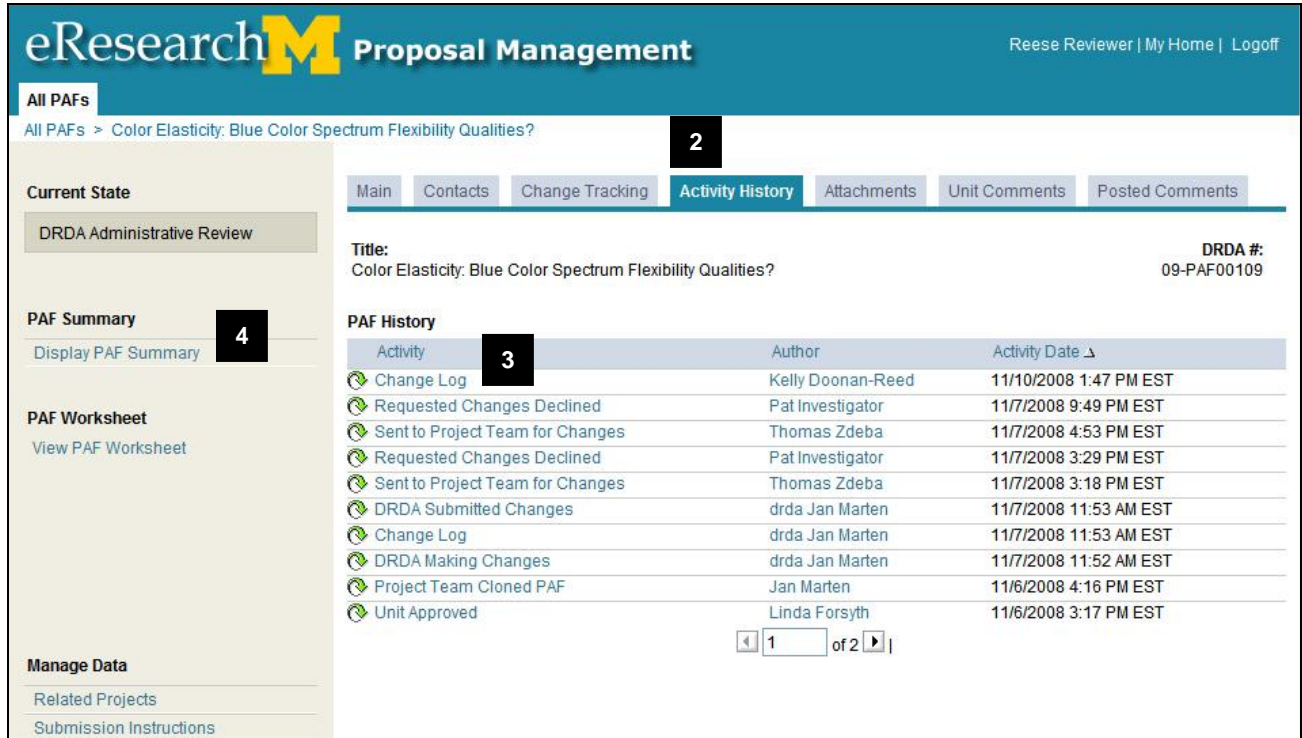
1. Click on the PAF Name to open the PAF Workspace.
2. Click the **Approved** tab.

**Note:** If you cannot locate the PAF:

- Make sure that you are viewing the correct workspace by looking for the bolded role title under My Roles.
- Make sure that you are on the Approved tab. The Home Workspace defaults to the Inbox tab when opened.

**REVIEW CHANGES (PAF Changes Since Approval), CONT.**

**PAF Workspace Activity History tab**



The screenshot shows the eResearchM Proposal Management interface. The main header includes the logo and the text "Proposal Management". The user is logged in as "Reese Reviewer" with options for "My Home" and "Logoff".

The breadcrumb trail is: All PAFs > Color Elasticity: Blue Color Spectrum Flexibility Qualities? (labeled with a '2').

The "Current State" section shows "DRDA Administrative Review".

The "PAF Summary" section has a "Display PAF Summary" link (labeled with a '4').

The "PAF Worksheet" section has a "View PAF Worksheet" link.

The "Manage Data" section includes "Related Projects" and "Submission Instructions".

The "Activity History" tab (labeled with a '3') is active, showing a table of activities:

Activity	Author	Activity Date
Change Log	Kelly Doonan-Reed	11/10/2008 1:47 PM EST
Requested Changes Declined	Pat Investigator	11/7/2008 9:49 PM EST
Sent to Project Team for Changes	Thomas Zdeba	11/7/2008 4:53 PM EST
Requested Changes Declined	Pat Investigator	11/7/2008 3:29 PM EST
Sent to Project Team for Changes	Thomas Zdeba	11/7/2008 3:18 PM EST
DRDA Submitted Changes	drda Jan Marten	11/7/2008 11:53 AM EST
Change Log	drda Jan Marten	11/7/2008 11:53 AM EST
DRDA Making Changes	drda Jan Marten	11/7/2008 11:52 AM EST
Project Team Cloned PAF	Jan Marten	11/6/2008 4:16 PM EST
Unit Approved	Linda Forsyth	11/6/2008 3:17 PM EST

The table has a pagination control showing "1 of 2".

3. Click the **Activity History** tab and review the sequence of activities following your unit approval.
4. Click **Change Log** to view the details of the change. *Refer to View Details of Changes Step by Step Procedure.*
5. Optional, click **Display PAF Summary** to see the change in the content of the actual PAF.

**ACKNOWLEDGE CHANGES**

**Home Workspace Approved tab**

The screenshot shows the 'Approved' tab selected in the navigation bar. The main content area displays two tables:

**PAFs with Changes Since Approval**

ID	Name	Date Modified	State	PI	Dept	Sponsor Name	Sponsor Deadline	Changes
09-PAF00109	Color Elasticity: Blue's Flexibility Qualities?	11/7/2008 11:53 AM	DRDA Administrative Review	Forrest	Materials Science & Engin.	Advanced Fiberoptics Corporation	11/20/2008	Acknowledge Other

**Approved PAFs**

ID	Name	Date Modified	State	PI	Dept	Sponsor Deadline	Sponsor
09-PAF00109	Color Elasticity: Blue's Flexibility Qualities?	11/7/2008 11:53 AM	DRDA Administrative Review	Forrest	Materials Science & Engin.	11/20/2008	Advanced Fiberoptics Corporation

1. Click **Acknowledge**. Notice that the PAF is listed under both organizational headers prior to acknowledging changes.

**Acknowledge window**

**Acknowledge**

Click OK to indicate acknowledgement of changes made to this project previously approved by your unit. Clicking OK will remove the project from the list of PAFs with Changes Since Approval. Select CANCEL to cancel this activity and keep the project in the list.

This activity does not indicate approval of changes. If you disagree with the changes, use the Suspend Approval activity in the Project Workspace.

2 OK Cancel

2. Click **OK** to indicate acknowledgement of changes. You are acknowledging your awareness of the changes.

ACKNOWLEDGE CHANGES, CONT.

Home Workspace Approved tab

The screenshot shows the eResearch Proposal Management interface. The top navigation bar includes the eResearch logo and 'Proposal Management' text, with a user profile 'Reese Reviewer | My Home | Logoff' on the right. Below the navigation bar, there are tabs for 'Inbox', 'Upcoming', 'Approved', 'Submitted to Sponsor', 'Active/Closed/Turned Down/Withdrawn', and 'Manage Departments'. The 'Approved' tab is selected. Underneath, there is a section titled 'PAFs with Changes Since Approval' which currently displays 'There are no items to display'. Below this is a section for 'Approved PAFs' with a filter dropdown set to 'ID' and a search input field. A table lists one PAF: ID '09-PAF00109', Name 'Color Elasticity; Blue Color Spectrum Flexibility Qualities?', Date Modified '11/10/2008 4:02 PM', State 'DRDA Administrative Review', Dept 'Forrest Materials Science & Engin.', Sponsor Deadline '11/20/2008', and Sponsor 'Advanced Fiberoptics Corporation'. The name of the PAF is circled in red.

The PAF is now listed once in your Home Workspace under Approved PAFs.

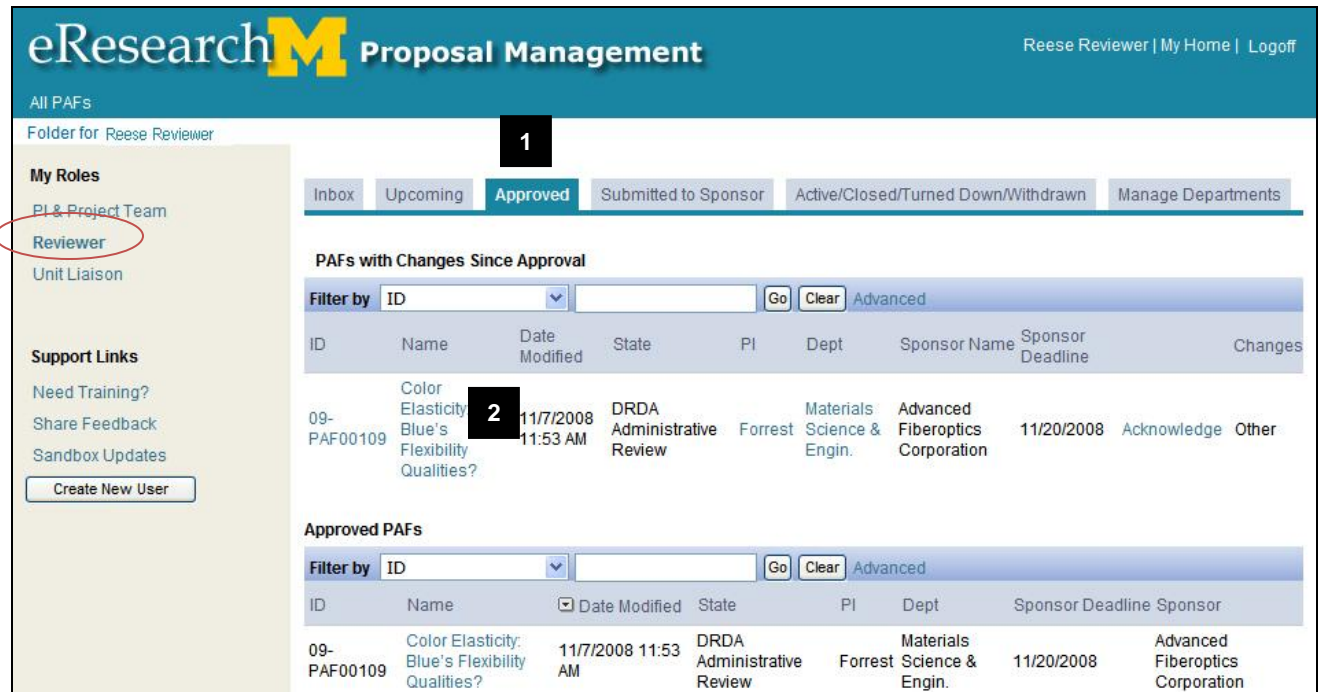
## Suspend Approval

### SUSPEND APPROVAL

If changes are made to a PAF after your unit approval or if other circumstances change prior to submission to sponsor, you have an option of “pulling back” your approval by using the Suspend Approval activity.

This procedure assumes that you are already logged in to eResearch Proposal Management (eRPM). If you are not familiar with the login procedure, refer to the *Login to eResearch Proposal Management Step by Step Procedure*.

#### Reviewer Home Workspace Approved tab



The screenshot shows the eResearchM Proposal Management interface. On the left sidebar, under 'My Roles', the 'Reviewer' role is circled in red. The main content area shows the 'Approved' tab selected, with a table of PAFs. A black box with the number '1' points to the 'Approved' tab, and another black box with the number '2' points to the PAF name 'Color Elasticity: Blue's Flexibility Qualities?' in the table.

ID	Name	Date Modified	State	PI	Dept	Sponsor Name	Sponsor Deadline	Changes
09-PAF00109	Color Elasticity: Blue's Flexibility Qualities?	11/7/2008 11:53 AM	DRDA Administrative Review	Forrest	Materials Science & Engin.	Advanced Fiberoptics Corporation	11/20/2008	Acknowledge Other

1. Click the **Approved** tab in your Home Workspace.
2. Click on the **PAF Name** to open the PAF Workspace.

**Note:** If you cannot locate the PAF:

- Make sure that you are viewing the correct workspace by looking for the bolded role title under My Roles.
- Make sure that you are on the Approved tab. The Home Workspace defaults to the Inbox tab when opened.



**REVIEW CHANGES (PAF Changes Since Approval)**

**PAF Workspace Activity History tab**

The screenshot shows the eResearchM Proposal Management interface. The breadcrumb trail is 'All PAFs > Color Elasticity: Blue Color Spectrum Flexibility Qualities?'. The 'Activity History' tab is selected, indicated by a '3' in a black box. The interface includes a sidebar with 'Current State' (DRDA Administrative Review), 'PAF Summary' (Display PAF Summary, indicated by a '5' in a black box), and 'PAF Worksheet' (View PAF Worksheet). The main content area shows the PAF title, DRDA # (09-PAF00109), and a 'PAF History' table. The table has columns for Activity, Author, and Activity Date. The first row, 'Change Log', is highlighted and has a '4' in a black box. A pagination control shows '1 of 2'.

Activity	Author	Activity Date
Change Log	Kelly Doonan-Reed	11/10/2008 1:47 PM EST
Requested Changes Declined	Pat Investigator	11/7/2008 9:49 PM EST
Sent to Project Team for Changes	Thomas Zdeba	11/7/2008 4:53 PM EST
Requested Changes Declined	Pat Investigator	11/7/2008 3:29 PM EST
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DRDA Making Changes	drda Jan Marten	11/7/2008 11:52 AM EST
Project Team Cloned PAF	Jan Marten	11/6/2008 4:16 PM EST
Unit Approved	Linda Forsyth	11/6/2008 3:17 PM EST

3. Click the **Activity History** tab and review the sequence of activities following your unit approval.
4. Click **Change Log** to view the details of the change. *Refer to View Details of Changes Step by Step Procedure.*
5. Optional, click **Display PAF Summary** to see the change in the context of the actual PAF.

SUSPEND APPROVAL

PAF Workspace Main tab

**Routing and Approval Status:**

Department	Department ID	Approved?	Date Approved	Approval Note
Materials Science &	221800	yes	11/6/2008	

1

1. Click **Suspend Approval** from the PAF Workspace.

**Suspend Approval window**

**Suspend Approval**

**Color Elasticity: Blue Color Spectrum Flexibility Qualities? (09-PAF00109)**

Select the department(s) for which you are suspending approval.  
Enter comments in the text box (optional).  
Click OK to suspend your approval of this PAF.  
Click CANCEL to cancel this activity and close this window.

Please select the department(s) for which you are suspending approval:

ID	Name	Associated Sections in This PAF
<input type="checkbox"/> 920200	Dbn Coll of Eng-Mechanical Eng	Space
<input type="checkbox"/> 916400	Dbn Research & Spons Programs	

Comments:

4

2. Select the department(s) for which you are suspending approval.
3. Optional, enter **Comments**.

**Note:** Messages/notes/comments posted are permanent and visible to anyone with access to the PAF.

4. Click **OK**.

**PAF Workspace Routing and Approval Status table**

Routing and Approval Status:				
Department	Department ID	Approved?	Date Approved	Approval Note
Dbn Coll of Eng-Mechanical Eng	920200	no		Pending
Materials Science & Engin.	221800	yes	11/6/2008 2:53 PM	
Dbn Col of Eng & Computer Sci.	920000	no		Pending
Dbn Research & Spons Programs	916400	yes	11/6/2008 3:02 PM	
CoE Research	210300	yes	11/6/2008 3:17 PM	

The table for Routing and Approval Status is updated to reflect that approval for the selected department(s) has been changed.

The **Unit Approve** activity is again available to you from the PAF Workspace. Refer to the *Unit Review and Approve Step by Step Procedure* for more information.

**Topic 21: eResearch Proposal Management Support and Additional Training**

Goal/outcome:

The purpose of the module is to make you aware of all the resources available to help you be successful in using eRPM.

Objectives:

After completing this module, you will be able to:

- Find additional help and support.
- Find additional training.

Help & Support:

- When to use eRPM or Unit Business Policy/Requirements, contact Your **Research Unit Liaison**  
<http://www.mais.umich.edu/groups/liaisonlist.html>
- Submission or sponsor specific questions  
**DRDA Project Representatives**  
<http://www.drda.umich.edu/contacts/drda/staff.html>  
Phone: (734) 764-5500  
Fax: (734) 763-4053, 764-8510
- Technical support (e.g., navigation, connectivity, and system errors)  
**ITS (MAIS) Help Desk**  
Phone: 734-936-7000, option 6  
E-mail: [maishelpdesk@umich.edu](mailto:maishelpdesk@umich.edu)

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## System-generated Email Notifications

The eResearch Proposal Management system generates email notifications on certain state transitions and upon the completion of certain events/activities. All email notifications include information about the project and a link to the PAF workspace.

This document provides tips about eRPM email notifications, outlines events that trigger email notification, and provides a short description of the email and its recipients.

### Email Configuration

- Add [eresearch@umich.edu](mailto: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.
- If you use Groupwise e-mail, follow the steps below. If you use another e-mail client, contact your system administrator for assistance.
  - To view the current email as HTML, click the message icon at the top of the email.
  - To change all incoming e-mail to HTML:
    1. Go to the Groupwise Main Mailbox.
    2. Select the "Tools" menu.
    3. Select "Options".
    4. Double click "Environment".
    5. Under the "Views" tab:
      - Check "Use default views for reading."
      - For "Default Read View & Font", select HTML.
    6. Click OK.



**WARNING!** Forwarding an e-mail using a plain text email system breaks links to eResearch system. Instead: go to eRPM and find proposal/project/award.

### Tips

- You cannot copy a document link and paste it into a web browser. It will not work.
- Forwarding an e-mail 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.

### Who Receives E-mail Notifications?

Based on the situation/event/system activity emails are sent to:

- **UM Principal Investigator & Primary Research Administrator**  
E.g., proposal routed for approval, reviewer requests changes, etc.
  - You cannot turn off the option to send e-mails to a Principal Investigator or Primary Research Administrator.
- **PAF Email Notifier** for each Department  
E.g., this group will get emails when it is their department's turn to review a PAF (instead of sending e-mails to all Reviewers).
  - Reviewers & Unit Liaisons for departments can change/control who is part of this email group for each Dept ID. This does not give Review access for the department. Reviewer or Reviewer Who Can Sign must be set-up separately. Contact your [Unit Liaison](#) for more information.

PAF Event/Activity	"Email Subject Line" and Description
When the PAF is <u>Routed for Approval</u> by the UM Principal Investigator or Primary Research Administrator...	<p>"PAF Ready for Unit Review" is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review.</p> <p>"PAF Routed for Unit Review" is sent to the Primary Research Administrator and UM Principal Investigator to confirm that the PAF has been routed to the first department(s) for review.</p>
When <u>Unit Approval</u> is submitted by a department reviewer who can sign...	<p>"Ready for Unit Review and Approval" is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review.</p>
When the <u>Project Team Submits Changes</u> ...	<p>"Changes Made to PAF by Project Team" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been changed. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</p>
When a <u>Reviewer Submits Changes</u> ...	<p>"Change Made to PAF by Unit Reviewer" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been changed. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.</p>
When a <u>Reviewer Requests Changes</u> from the Project Team...	<p>"A Reviewer has Requested Changes to a PAF" is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that there is a request for changes from one of the Reviewers during Unit Review.</p>
When the <u>Project Team Declines Requested Changes</u> ...	<p>"Project Team Decline Requested Changes Activity" is sent to the Reviewer, DRDA staff or Project Representative who requested change to notify that the request has been declined.</p>
When <u>DRDA Submits Changes</u> to a PAF...	<p>"DRDA Submit Changes Activity" is sent to the Primary Research Administrator, Contact UM Principal Investigator, and the PAF Email Notification contacts for Dept IDs that have already submitted approval</p>
When the PAF is <u>Sent to Project Team for Changes</u> by DRDA...	<p>"DRDA Has Requested Changes to a PAF" is sent to the Primary Research Administrator and Contact UM Principal Investigator of the change request.</p>
When DRDA <u>Revokes a Change Request</u> ...	<p>"DRDA Cancels Change Request" is sent to the Primary Research Administrator and Contact UM Principal Investigator.</p>
When <u>Requested Action is Declined</u> by DRDA...	<p>"DRDA Has Declined Requested Action" is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that the requested action, typically to put the PAF into an editable state, has been declined.</p>



PAF Event/Activity	"Email Subject Line" and Description
When <u>Project Team Cancels PAF...</u>	"PAF Cancelled by Project Team" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been canceled. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.
When the Project Team requests that <u>DRDA Cancel PAF...</u>	"DRDA Cancel PAF Activity" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF has been canceled. The notification is also sent to the Primary Research Administrator and Contact UM Principal Investigator.
When an <u>Ad Hoc Reviewer</u> is assigned by a department reviewer...	"You have been assigned as an Ad Hoc Reviewer on a PAF" is sent to the assigned individual to notify that they have been added to a PAF as an Ad Hoc Reviewer with view rights and ability to comment.
When the <u>Post a Comment for the Entire Project</u> activity is used...	"Post a Comment to the Entire Project Activity" sends an email to Individuals selected by the person who posted the comment.
When an ad hoc reviewer uses <u>Post Reviewer Comment...</u>	"Post Reviewer Comment Activity" sends an email to Individuals selected by the ad hoc reviewer who posted the comment.
When there is a <u>Change of Conflict of Interest</u> by a UM Principle Investigator...	"Conflict of Interest Information Changed" is sent to the DRDA Project Representative and the PAF Email Notification contacts for Dept IDs that have already submitted approval
When a <u>PAF is Routed to DRDA...</u>	"PAF Routed to DRDA" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval, the Primary Research Administrator and Contact UM Principal Investigator to notify that a PAF has been approved by all reviewing departments and has moved to DRDA.
When a <u>Request for Re-Review</u> is sent by DRDA...	"Request Re-Review Activity" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval to notify that the PAF needs to be re-reviewed. The notification is also sent to the Contact UM Principal Investigator.
When a <u>PAF is in Post-Submission Unit Review</u>	"A Project has moved to state Post-Submission Unit Review" is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a PAF is ready for their unit review.
When DRDA <u>Sends to Project Team for Submission to Sponsor...</u>	"Proposal Ready for Project Team Submission to Sponsor" is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that DRDA has completed their reviews.
When a <u>Project is Submitted to Sponsor...</u>	"A Project has been Submitted to its Sponsor" is sent to the PAF Email Notification contacts for Dept IDs that have already submitted approval, the Primary Research Administrator and Contact UM Principal Investigator.

PAF Event/Activity	"Email Subject Line" and Description
When a project has been in the state of DRDA Approved for longer than 9 days...	"10 Day Submission Reminder" "20 Day Submission Reminder" "30 Day Submission Reminder" are reminders sent to the Primary Research Administrator and Contact UM Principal Investigator that DRDA is waiting for confirmation of submission to the sponsor.
When DRDA <u>Sends a Contract to PI for Signature...</u>	"Contract Sent for PI Signature" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When DRDA <u>Releases Award Information...</u>	PAN and PAC notifications are sent to the Contact UM Principal Investigator, Sponsor Principal Investigator, Participating Investigators with Specified Effort, all Administrative Contacts listed on PAF, and the PAN/PAC Notifiers for reviewing departments.
When a project is <u>Closed</u> by DRDA...	"Project Closed" is sent to the Primary Research Administrator and Contact UM Principal Investigator to notify that the project has moved to a state of Closed.
When DRDA <u>Sends a Notice for Paper Submission...</u>	"Proposal Received by DRDA" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When DRDA <u>Sends to Project Team for Finalization</u> of the proposal...	"Project Team Finalize Proposal" is sent to the Primary Research Administrator and Contact UM Principal Investigator.

Hardship Event/Activity	"Email Subject Line" and Description
When a Hardship Request is <u>Routed for Approval</u> by the UM Principal Investigator or Primary Research Administrator...	"Hardship Request Ready for Review" is sent to the PAF Email Notification contact(s) within the Dept ID to notify that a Hardship Request is ready for review.
When <u>Unit Approval</u> has been submitted for a Hardship Request...	"Hardship Request has been Approved" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When <u>Unit Denies</u> a Hardship Request...	"Hardship Request Denied" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When <u>DRDA Denies</u> a Hardship Request...	"Hardship Request Denied by DRDA" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When DRDA <u> Cancels</u> a Hardship Request...	" DRDA has Cancelled a Hardship Request" is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID, Primary Research Administrator and Contact UM Principal Investigator.
When a <u>Reviewer Requests Changes</u> ...	"Changes Requested for Hardship" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When <u>DRDA Requests Changes</u> ...	"DRDA Request Changes to Hardship" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When DRDA <u>Routes the Hardship Request for Re-Approval</u> ...	"Hardship Ready for Re-Approval" is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID.
When the Project Team <u>Submits Changes</u> requested by a reviewer or by DRDA...	"Hardship Changes have been submitted" is sent to the PAF Email Notification contact(s) within the reviewing Dept.ID.
When the Project Team is notified of <u>Hardship Account Activation</u> ...	"A Hardship has been activated" is sent to the Primary Research Administrator and Contact UM Principal Investigator.
When a <u>Hardship Notification is Released</u> ...	"Release Hardship Notification Activity" is sent to the owning department of the parent proposal/PAF.

## Hardship Requests

Hardships need be created, signed by the UM PI & then routed for approval. Hardship review:

- Hardships need to be reviewed by either Administrative Home of a PAF or its parent.
- The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.
- Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.

This procedure details how to:

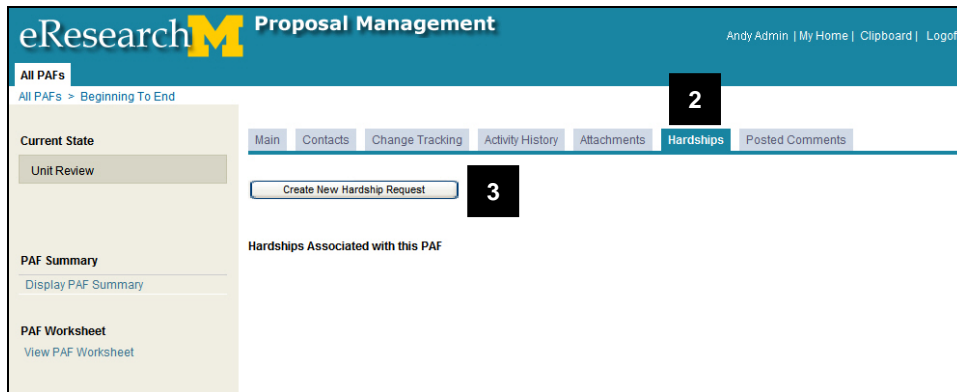
- [Create a New Hardship Request](#) Page 1
- [UM PI Sign Hardship](#) Page 4
- [Route Hardship Request for Review](#) Page 6

### Important Information

- Hardships can only be created from the PAF Workspace. The only way to view information about the Hardship is from the PAF Workspace.
- Hardships can be requested in any state except Cancelled, Withdrawn, and Turned Down.
- Only the UM PI, Primary Research Administrator, and Reviewers from the Administrative Home Department can request a hardship.

## Create a New Hardship Request

### PAF Workspace



1. Using your Home Workspace find the PAF that needs a hardship created.
2. Click the **Hardships** tab on the PAF Workspace.
3. Click **Create New Hardship Request**.

New Hardship Request

The screenshot shows the 'New Hardship Request' form in the eResearch Proposal Management Development system. The form is titled 'Hardship Request' and includes instructions: 'Complete all 4 questions of the Hardship Request. After all required questions are completed, the PI or Primary Administrative Contact will route the Hardship for Unit Review.' It also notes that required questions are marked with an asterisk and that questions must be completed before saving or leaving the page.

The form is divided into four main sections, each with a 'HELP' button:

- 1. Description:** A text area for the description, with a '4' in a black box indicating the first step.
- 2. Justification:** A text area for justification, with a '5' in a black box. Below it is an 'Add' button and a table with columns 'name' and 'description', with a '6' in a black box.
- 3. Period of Hardship:** Fields for 'Proposed Start Date' and 'Proposed End Date', with a '6' in a black box.
- 4. Itemized Budget:** A text area for itemized budget, with a '7' in a black box. Below it is an 'Add' button and a table with columns 'name' and 'description', with an '8' in a black box. Below the table are fields for 'Indirect Cost Rate', 'Total Direct Amount Requested', 'Total Indirect Amount Requested', and 'Total Amount Requested', with a '9' in a black box. A '10' in a black box is also present near the 'Total Direct Amount Requested' field. A '11' in a black box is near the 'Total Amount Requested' field. A '12' in a black box is near the 'Finish' button.

The 'Finish' button is located at the bottom right of the form.

4. Enter **Description**.
5. Enter **Justification**.
6. Optional, **Add** document(s) that support the justification.
7. Enter **Proposed Start** and **End Dates**.
8. Enter **Itemized Budget** (by general category), including indirect costs for the time period.
9. Optional, **Add** document(s) that support the itemized budget.
10. Enter **Indirect Cost Rate**.
11. Enter **Total Direct Amount Requested**.  
Optional, enter **Total Indirect Amount Requested**.
12. **Total Amount Requested** will display when the page is saved.
13. Click **Finish** to close page and return to the Hardship Workspace.  
**Note: Save** saves page but you do not leave the page.

## Hardship Workspace



14. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

**TIP:** To notify the PI that the hardship request is ready for PI signature, you could use the activity **Post a Comment for the Entire Project** from the PAF Workspace. Be sure to select the PI as an email recipient.

## PAF Workspace



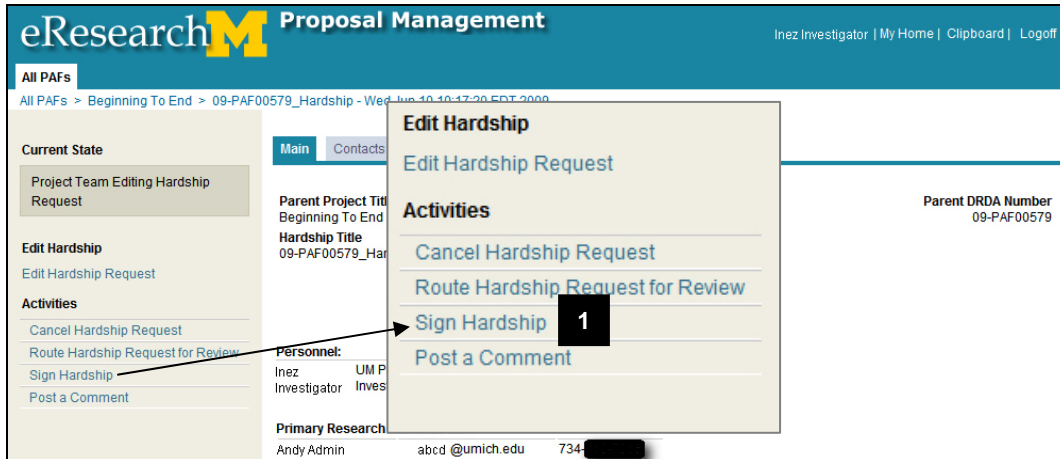
15. Since a hardship has been created for the PAF, a message displays on the PAF Workspace.



**PI Sign Hardship**

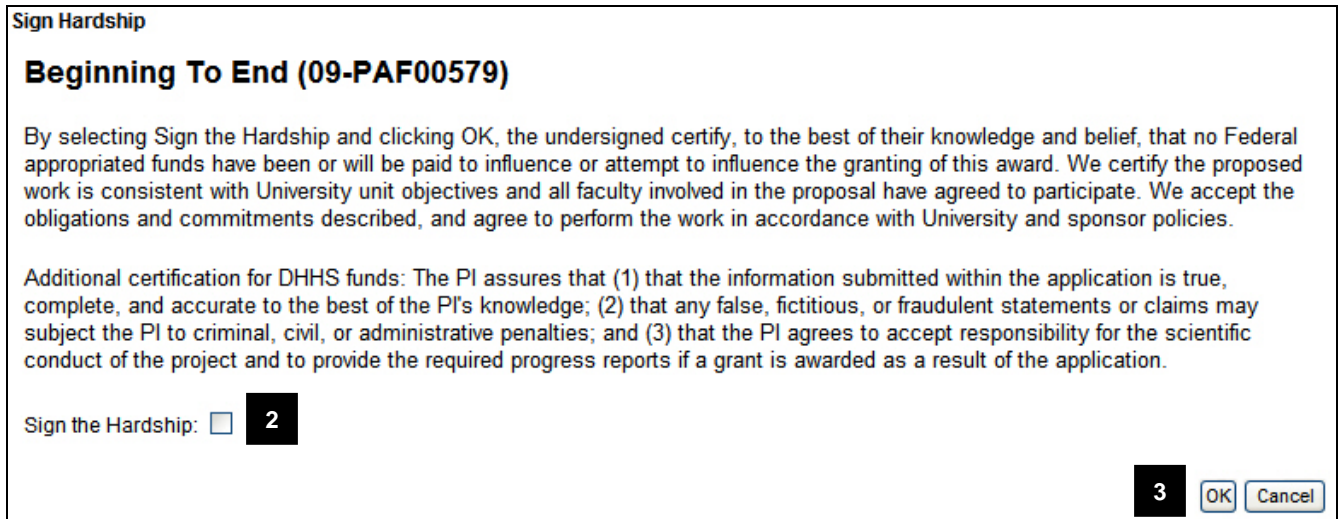
PI signature is required in order to route the hardship request for unit review.

**Hardship Workspace**



1. Click the **Sign Hardship** activity from the Hardship workspace.

**Sign Hardship Activity Window**



2. Select **Sign the Hardship**.
3. Click **OK**.



4. The Sign Hardship activity is recorded in Recent Activity on the PAF Workspace.

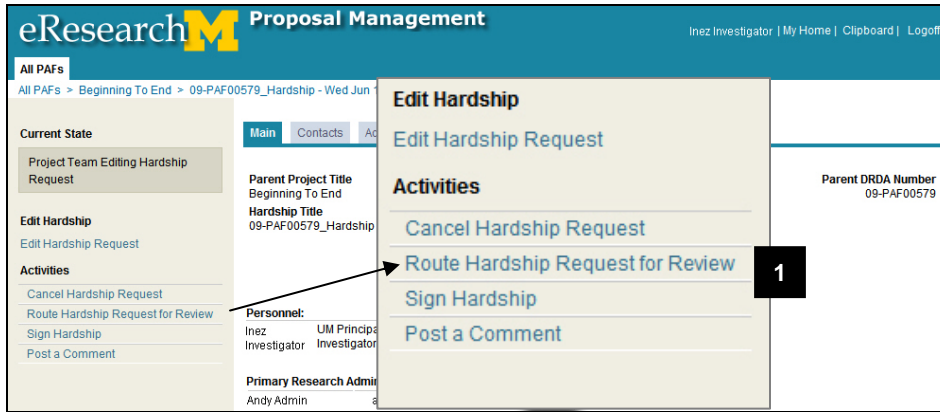
### Hardship Workspace

The screenshot shows the 'Hardship Workspace' for a specific PAF. The header includes the eResearch logo and 'Proposal Management', with user information 'Inez Investigator | My Home | Clipboard | Logoff'. A breadcrumb trail reads 'All PAFs > Beginning To End > 09-PAF00579\_Hardship - Wed Jun 10 10:17:20 EDT 2009'. A 'Current State' indicator shows '5'. The main content area has tabs for 'Main', 'Contacts', 'Activity History', 'Attachments', and 'Posted Comments'. On the left, there are links for 'Project Team Editing Hardship Request', 'Edit Hardship', and 'Activities'. The main content displays 'Parent Project Title: Beginning To End', 'Parent DRDA Number: 09-PAF00579', and 'Hardship Title: 09-PAF00539 Investigator- Hardship 1'. Below this, 'Personnel' are listed: 'Inez Investigator, UM Principal Investigator, inezinw@umich.edu, 734-...' and 'Primary Research Administrator: Andy Admin, abcd@umich.edu, 734-...'.

5. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

Route Hardship Request for Review

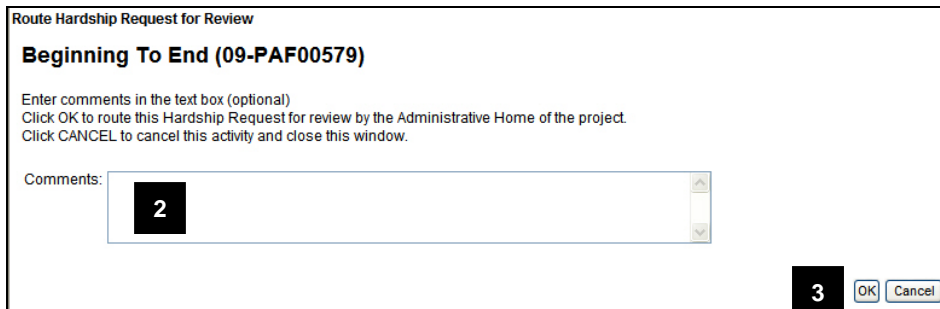
Hardship Workspace



1. Click the **Route Hardship Request for Review** activity from the Hardship workspace.

**Note:** The Hardship Workspace is accessed by clicking on the Hardship tab on the PAF Workspace.

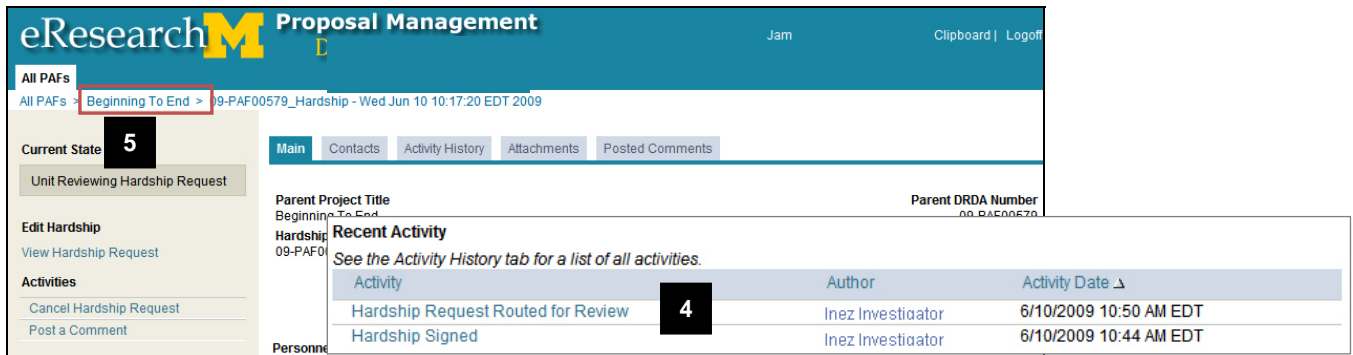
Route Hardship Request for Review Activity Window



2. Optional, enter **Comments**. These comments are permanent and cannot be changed. They will be displayed in Recent Activity on the PAF Workspace.

3. Click **OK** to send the hardship to the

**Note:** An email notification, which includes your comments, is sent to the PAF email notification contact(s) in the requesting department after you click OK to complete this activity.



4. The hardship request moves to the state of **Unit Reviewing Hardship Request** and the **Route Hardship Request for Review** activity is recorded in **Recent Activity** on the PAF Workspace.

5. Click the name of the PAF in the breadcrumb trail navigation to exit the Hardship Workspace and return to the PAF Workspace.

## Unit Review and Approve Hardship Request

- **Hardship Requestors:**  
Hardships can only be requested by the UM PI, Primary Research Administrator, and Reviewers from the Administrative Home Department.
- **Hardship Reviewers:**
  - Hardships need to be reviewed by either Administrative Home of a PAF or its parent.
  - The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.
  - Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.

This procedure details how to:

- [Open a Hardship Workspace](#) Page 1
- [Review and approve a hardship request](#) Page 2
- [Deny or cancel a hardship request](#) Page 5
- [Request changes](#) Page 6
- [Post a comment on a Hardship Workspace](#) Page 7

### Open Hardship Workspace

#### PAF Workspace

The screenshot shows the eResearch Proposal Management interface. At the top, there is a navigation bar with the eResearch **M** logo and 'Proposal Management' text. On the right of the navigation bar, it says 'Andy Admin | My Home | Clipboard | Projects | Logoff'. Below the navigation bar, there is a breadcrumb trail 'All PAFs > Beginning To End' and a 'Layout' button. A main navigation menu contains tabs for 'Main', 'Contacts', 'Change Tracking', 'Activity History', 'Attachments', 'Hardships', 'Posted Comments', and 'DRDA Notes'. The 'Hardships' tab is selected and highlighted with a black box containing the number '1'. Below the navigation menu, there is a 'Create New Hardship Request' button. A section titled 'Hardships Associated with this PAF' contains a table with two columns: 'ID' and 'Name'. The table has one row with the ID 'HAR00000103' and the Name '09-PAF00579 Investigator-Hardship1'. A black box with the number '2' is placed over the 'Name' cell. On the left side of the workspace, there is a sidebar with sections for 'Current State' (Unit Review), 'PAF Summary' (Display PAF Summary), and 'PAF Worksheet' (Edit PAF Worksheet). A red message 'Hardships associated with this PAF' is visible above the table.

1. Click the **Hardships** tab on the PAF Workspace.
2. Click the **Name** of the hardship.

Review and Approve Hardship Request

Hardship Workspace

3. Click View Hardship Request.

Hardship Request View

The Hardship Request is a one page view with links to attachments if any were uploaded.

4. Click **Exit** or **Finish** to close the view and return to the Hardship Workspace.

### Hardship Workspace

5. Click the **Unit Approve Hardship Request** activity from the Hardship Workspace.

### Unit Approve Hardship Request

6. Select **Approve Hardship Request**.

#### Important!

- Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.
- The Dean's office is not required to review the Hardship in eRPM. Business policies for individual units may vary.

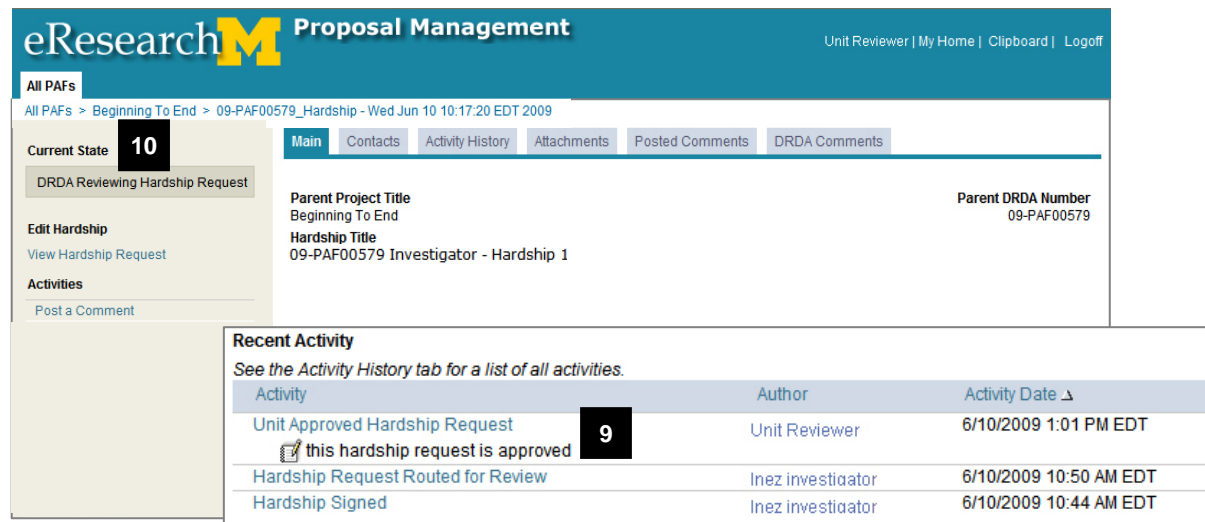
7. Optional, enter **Comments**. These comments will be displayed in Recent Activity on the PAF Workspace.

8. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.



## Hardship Workspace




**Parent Project Title**  
Beginning To End

**Parent DRDA Number**  
09-PAF00579

**Hardship Title**  
09-PAF00579 Investigator - Hardship 1

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

Activity	Author	Activity Date
Unit Approved Hardship Request	Unit Reviewer	6/10/2009 1:01 PM EDT
 this hardship request is approved	Inez investigator	6/10/2009 10:50 AM EDT
Hardship Request Routed for Review	Inez investigator	6/10/2009 10:44 AM EDT

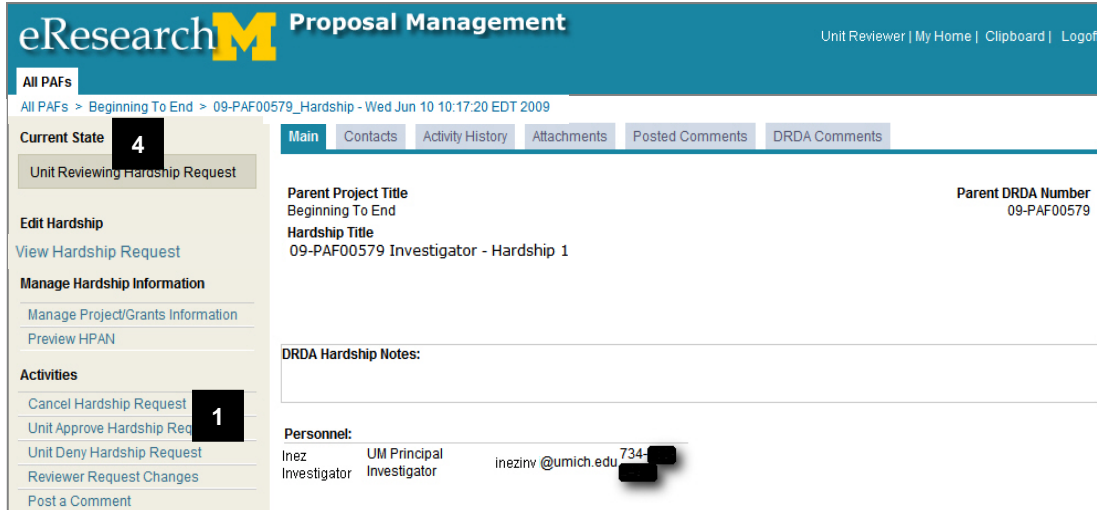
9. The hardship request moves to the state of **DRDA Reviewing Hardship Request** and the **Unit Approved Hardship Request** activity is recorded in **Recent Activity** on the PAF Workspace.

**Note:** Once the hardship request is approved, the activities to deny, cancel and request changes are no longer available.

10. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

**Cancel or Deny Hardship Request**

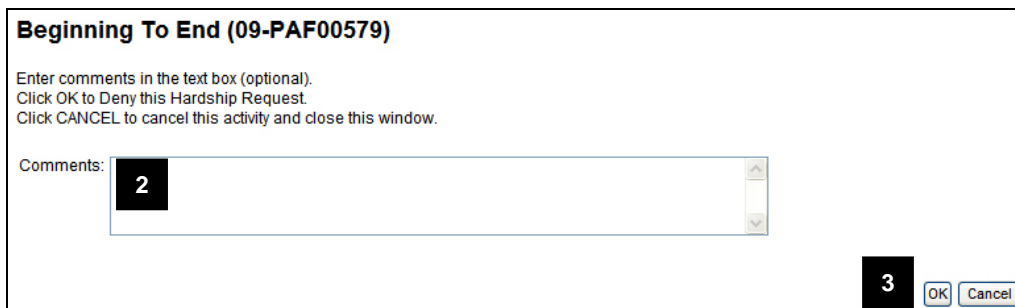
**Hardship Workspace**



After reviewing the Hardship Request,

1. Click either the **Cancel Hardship Request** or **Unit Deny Hardship Request** activity from the Hardship Workspace. The activity window that appears works the same for both activities.

**Unit Deny Hardship Request Activity Window**



2. Enter **Comments** regarding your decision. These comments will be displayed in Recent Activity on the PAF Workspace.
3. Click **OK**.

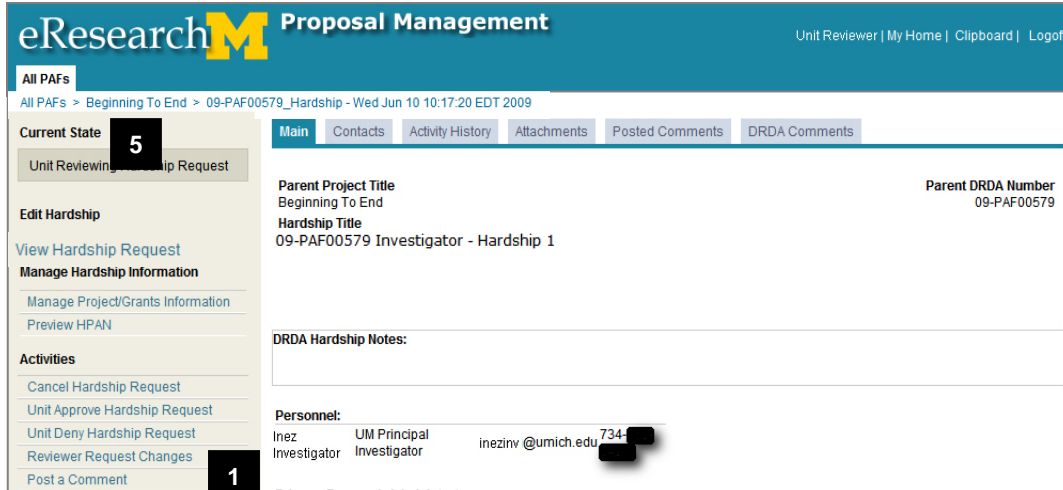
**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state of either Hardship Request Denied or Hardship Request Cancelled and the activity is recorded in Recent Activity on the PAF Workspace.

4. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

**Reviewer Request Changes**

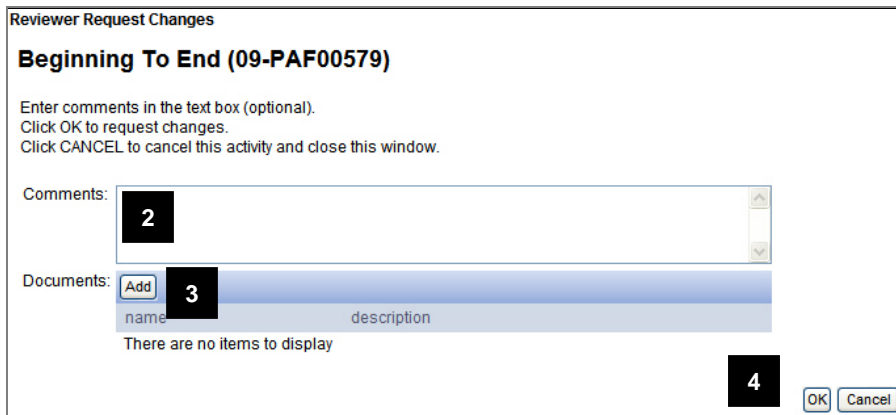
**Hardship Workspace**



After reviewing the Hardship Request,

1. Click the **Reviewer Request Changes** activity from the Hardship Workspace.

**Reviewer Request Changes Activity Window**



2. Enter **Comments** describing the change you are requesting.
3. Optional, **Add** Documents.
4. Click **OK**.

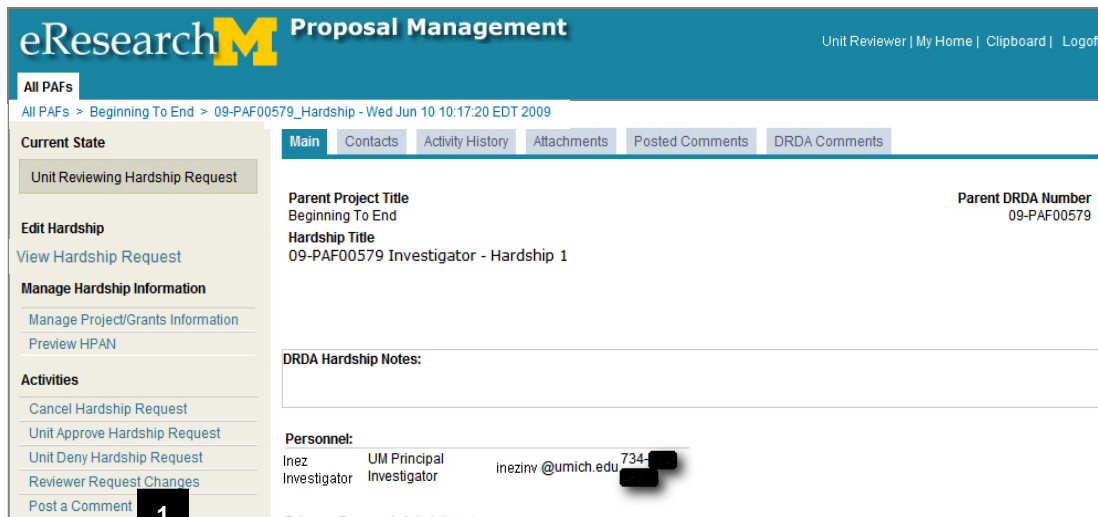
**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state **Unit Reviewer Requests Hardship Changes** and the activity is recorded in **Recent Activity** on the PAF Workspace.

5. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

Post a Comment

Hardship Workspace



1. Click the **Post a Comment** activity from the Hardship Workspace.

Post a Comment Activity Window



- 2. Enter **Comments**. These comments will be displayed in Recent Activity on the PAF Workspace.
- 3. Click **OK**.