# Reviewer Course Topics and Materials

## Course 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.

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Last updated: 03/20/09

http://eresearch.umich.edu
Topic: eResearch Proposal Management Overview

Goal/Outcome:
To gain an understanding of Proposal Management and how eResearch supports the process.

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.

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eRPM system workflow starts at proposal creation and continues through active project.
Topic: Home Workspace: Find Proposals and Projects

Goal/outcome:
To know how to use the Home Workspace to find and track proposals and projects.

Objectives:
After completing this module, you will be able to:
- Login to eResearch.
- Use your Reviewer Home Workspace tabs to track proposal states.
- Find proposals and projects by using All PAFs and the filter by method.

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Login to eResearch (step by step procedure) | 6
Reviewer Home Workspace (field description) | 8
Find PAFs (step by step procedure) | 10
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/](http://eresearch.umich.edu/).

**Important Information**
- If you need a uniqname and a UMICH Kerberos password, go to: [http://www.itd.umich.edu/help/faq/uniqnames/](http://www.itd.umich.edu/help/faq/uniqnames/)
- 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**

2. Click Login under Proposal Management.

Last updated: 03/4/09
3. Enter your **Login ID** (uniqname 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**.

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.

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**.

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

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 role appears 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

**Upcoming** – 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.

**Approved** – 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:
- PAFs with Changes Since Approval
- Approved PAFs

**Submitted** – Displays all PAFs/proposals submitted to a sponsor.

**Active/Closed/Turned Down/Withdrawn** – Displays all projects that are active, closed, have been turned down or withdrawn. The PAFs that appear are divided into the following categories:
- Active
- Award Received
- Closed
- Cancelled
- Not Funded

**Manage Departments** – Lists all departments assigned to you as a Reviewer. Click on the Manage Department to display Reviewers, Reviewers Who can Sign, PAF Email Recipients, and PAN/PAC email recipients for the department.

**Projects/PAFs/Proposals** 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.

**State** – Location where the proposal is in the process, e.g., Unit Review, DRDA Review.

**Filter by** – Allows you to search for proposals by ID (number), name, state, PI, or department. You select a Filter by criteria, enter a keyword in the field, and click Go.

**All PAFs** – Displays all of your PAFs/proposals in any state.

**My Home** – Allows you to return to the first page of your Home Workspace from any page in the system.

**Logoff** – Allows you to exit eResearch.

**Support Links** – Provides links to support resources and materials

Last updated: 03/11/09
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.
1. Click **All PAFs** from your Home Workspace.

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: Routing Logic and Reviews

Goals:
To use the PAF workspace in order to find PAFs that need review 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.

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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 uniqname 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.

**Recipient:**
This message was sent to the following:
- Reese Reviewer
- Arnold Approver

**Questions:**

1. Refer to [online help](http://www.eresearch.umich.edu/) 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.
Topic: PAF Workspace and Reviewing a PAF

Goals:

- To 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

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http://eresearch.umich.edu
The Proposal Approval Form (PAF) Workspace is available for a PAF after it is created in eResearch Proposal Management. Use it to:

- **View information** regarding
  - 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.
- **Complete activities** related to the PAF/proposal (e.g., Edit PAF Worksheet, Sign PAF, Route for Approval, etc.).

### Important Information

What can be viewed in the PAF Workspace depends on the PAF’s location in the routing and approval process (State). This document shows examples of Proposal Preparation, Unit Review & Active.

### PAF Workspace – Proposal Preparation State (before routed to units for approval)

- **Current State**
  - Displays the location of the proposal in the routing and approval process. States to pay attention to include:
    - **Proposal Preparation**: PAF/proposal is in this state when being completed by PI & Project team.
    - **Unit Review**: Proposal has been routed to units for review.
    - **DRDA Review**: Proposal being reviewed by DRDA.
    - **Submitted to Sponsor**: Proposal submitted to sponsor by PI/Project Team or DRDA.
    - **Active**: Project active and you can view award information.

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

- **Edit PAF Worksheet**
  - Allows you to make changes to the PAF.
PAF Workspace – Proposal Preparation State (before routed to units for approval)

D SF-424 Summary – Displays a printer friendly version of all information currently entered on Grants.gov forms. After the Grants.gov forms are complete, successfully validated, and a PDF version generated, you can review all information entered on Grants.gov forms and attached documents. Documents are not interleafed in proper order, but will be submitted in correct order.

E Grants.Gov Forms – If you have been given rights to view Grants.gov forms, you will see this link. In order to edit Grants.gov forms, you must be given rights to view & edit Grants.gov forms.

F Activities – Displays activities that can be completed. Activities available are based on:
- State of the PAF/proposal (E.g., once route PAF for approval, the PI/Project team is given the option to make changes to the PAF)
- Your role (E.g., only the UM Principal Investigator has the option to the Sign the PAF.)

G Tabs organize the PAF Workspace into the following sections:
- **Main** – Displays contact information for PIs, Sponsor PI, the Primary Research Administrator, and the Direct Sponsor. See below for more information about the fields on this tab.
- **Contacts** – Displays contact information for Project Personnel, DRDA Project Representative and Administrative Staff.
- **Activity History** – Displays a complete list of the Activities executed on the PAF once the PAF has been routed for approval.
- **Attachments** – Displays the documents that are attached to the PAF/proposal/project.
- **Posted Comments** – 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 have Reviewer access to proposal/project.

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PAF Workspace – Proposal Preparation State (before routed to units for approval)

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

**I** DRDA # – Displays the 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).

**J** Personnel - Displays the contact information for all UM and Sponsor PIs.

**K** Deadlines – Displays the deadlines that were entered on the PAF.

**L** Sponsors – Displays the direct & prime sponsor information.

**M** Project Administrative Home – Displays the Department that is the Project Administrative Home. Clicking on the department name displays contact information.

**N** DRDA Project Representative – Displays the Project Representative.

**O** Recent Activity – 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.

**P** My Home – Allows you to return to your Home Workspace.

**Q** Logoff – Allows you to exit eResearch Proposal Management.
PAF Workspace – Unit Review State (after routed to units for approval)

After a PAF is routed for approval, the workspace content is expanded to include additional information. This additional information is highlighted below.

**P** View PAF Worksheet – the PAF is in a non-editable state (e.g., Unit Review) & worksheet is read-only.

**Q** Manage Data – Certain data can be managed without putting the PAF into an editable state.

**R** Additional tabs:

- **Change Tracking** – Displays a log of all change activities, the name of the person who made the change, and date of the change activity.

- **Unit Comments** – Displays comments that are attached to the PAF. The comments are listed by department name and are available only to reviewing departments.

**S** Routing and Approval Status - Displays all Units that are required to review. Contact information for the Unit can be viewed by clicking the name of the Unit in the list.

**T** DRDA Approval Status - 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.
Project Workspace – Active State

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

<table>
<thead>
<tr>
<th></th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>DRDA number.</td>
</tr>
<tr>
<td>B</td>
<td>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</td>
</tr>
<tr>
<td>C</td>
<td>UM Principal Investigator - who received the award and date when processed.</td>
</tr>
<tr>
<td>D</td>
<td>Administrative Home - for the project.</td>
</tr>
<tr>
<td>E</td>
<td>Post Award - contact for the award.</td>
</tr>
<tr>
<td>F</td>
<td>DRDA Project Representative - contact for the award.</td>
</tr>
</tbody>
</table>
### Project Workspace – Active State (Continued)

<table>
<thead>
<tr>
<th>PAF Worksheet</th>
<th>View PAF Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>G</strong> Project/Grant Coordinator</td>
<td></td>
</tr>
<tr>
<td><strong>H</strong> Project Type, Project Class, Project Period, Estimated Award, Proposal Has UM Cost Sharing</td>
<td></td>
</tr>
<tr>
<td><strong>I</strong> Project Sponsors</td>
<td></td>
</tr>
<tr>
<td><strong>J</strong> Sponsor Acknowledgement Number</td>
<td></td>
</tr>
<tr>
<td><strong>K</strong> Award Notices – Click link to view PAN or PAC</td>
<td>Notice ID</td>
</tr>
<tr>
<td></td>
<td>- Format: Project grant number (PGN) - 0 e.g., F123456-0</td>
</tr>
<tr>
<td></td>
<td>- Any PAN sent between January 5 – February 24, 2009 has the following format: PGN-1.</td>
</tr>
<tr>
<td></td>
<td>- Based on user feedback the Notice ID for PANs was changed to PGN-0 in order to accommodate the standard PAC numbering sequence.</td>
</tr>
<tr>
<td></td>
<td>- PACs will increment the Notice ID. First PAC is: PGN-1 e.g., F123456-1 Second PAC is: PGN-2 e.g., F123456-2</td>
</tr>
<tr>
<td><strong>L</strong> Project/Grants</td>
<td></td>
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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.
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**.
Topic: PAF Worksheet Changes during Unit Review

Goals/Outcomes
To 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
- View and interpret Change Logs
- Request that the Project Team Make Changes

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In the state of Unit Review, a Reviewer 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 any Reviewers 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**

1. Click the **Reviewer Make Changes** activity from the PAF Workspace.
Make Changes Window

2. Select the departments that your changes will impact.
3. Optional, enter Comments.
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

5. Click the Edit PAF Worksheet link from the PAF Workspace to make changes.
MAKE CHANGES AND SUBMIT CHANGES, cont.

PAF Workspace Main tab

6. Click **Submit Changes** activity from the PAF Workspace.
Submit Changes Window

Color Elasticity: Blue's Flexibility Qualities? (09-PAF00109)

Enter comments in the text box (optional).
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:

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Associated Sections in This PAF</th>
</tr>
</thead>
<tbody>
<tr>
<td>02200</td>
<td>Dir Coll of Eng-Mechanical Eng</td>
<td>Space</td>
</tr>
</tbody>
</table>

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.

7. Select the department(s) on behalf of which you are requesting changes.
8. Select a Change Type.
9. Optional, enter Comments.

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.
1. Click the **Reviewer Request Changes** activity from the PAF Workspace.
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 certain personnel listed on the PAF. 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](http://www.eresearch.umich.edu/) 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.

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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**.
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: Fuchsia 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.
Topic: Working with Documents

Goals/Outcome
To practice working with documents attached to a PAF.

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

- Find and view documents and document history
- Add (attach) documents to a PAF
- Edit and delete documents attached to a PAF

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Working With Documents (step by step procedure) | 34
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**.
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**.

6. 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.

   **Notes:**
   - Each version of the document is listed on its own line.
   - 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.

Last updated: 3/12/09

http://eresearch.umich.edu
Topic: Assigning Ad Hoc Reviewers and Submitting Unit Approval

Goals/Outcomes:
To gain an understanding of the impact of assigning an ad hoc reviewer, know where to post comments, and how unit approval is submitted.

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

- Assign an ad hoc reviewer
- Post comments
- Submit approval

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Assign an Ad Hoc Reviewer

Based on the information provided in the PAF, the system determines to 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.

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

1. Click the Assign Ad Hoc Reviewer activity from the PAF Workspace.
2. Click **Add**.

### Select One or More Persons window

3. Select the **Filter by** criteria.
   
   **Note:** **User ID** is the uniqname, **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

**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:**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indul</td>
<td></td>
<td>Kim</td>
<td>inkim</td>
</tr>
</tbody>
</table>

**Comments:**

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

<table>
<thead>
<tr>
<th>From:</th>
<th><a href="mailto:eresearch@umich.edu">eresearch@umich.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>To:</td>
<td><a href="mailto:eresearchpm-test@umich.edu">eresearchpm-test@umich.edu</a></td>
</tr>
<tr>
<td>Cc:</td>
<td></td>
</tr>
<tr>
<td>Subject:</td>
<td>You have been assigned as an Ad Hoc Reviewer on a PAF</td>
</tr>
</tbody>
</table>

**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](http://eresearch.umich.edu)
- PAF Title: (Marlen) Turkish coffee and the effect on bunion reduction in males
- PI: Pat Investigator
- **Other Key Personnel:** Conrad Investigator

**Project Administrative Home:** 227000 Nuclear Enq & 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](http://eresearch.umich.edu)
   You may be prompted to login using your uniqname and Kerberos password.
2. Click View 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.
When a PAF moves from Proposal Preparation into the state of Unit Review, each Reviewer can access that PAF from their Home Workspace.

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 with a link to the PAF if you have elected to receive notifications. Contact your Unit Liaison regarding your email notification status.

**Reviewer Home Workspace Inbox tab**

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.
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.
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**.

Click OK to close summary without taking action.
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 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.
Post a Comment for the Entire Project Window

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. 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.
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/](http://www.eresearch.umich.edu/)
Topic: DRDA Reviews, Changes and Submission to Sponsor

Goal/outcome:
To gain insight into DRDA processes through submission to sponsor and identify the impact of changes after you have submitted approval.

Objectives:
After completing this module, you will be able to:
- Recognize the high level flow of the PAF through DRDA to Submission to Sponsor.
- Acknowledge a change
- Suspend approval

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</tbody>
</table>
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

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

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

1. Click **Acknowledge**. Notice that the PAF is listed under both organizational headers prior to acknowledging changes.

**Acknowledge window**

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. Click **OK** to indicate acknowledgement of changes. You are acknowledging your awareness of the changes.
ACKNOWLEDGE CHANGES, CONT.

Home Workspace Approved tab

The PAF is now listed once in your Home Workspace under Approved PAFs.
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

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.
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.
1. Click **Suspend Approval** from the PAF Workspace.
Suspend Approval window

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:

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Associated Sections in This PAF</th>
</tr>
</thead>
<tbody>
<tr>
<td>020200</td>
<td>Dbn Coll of Eng-Mechanical Eng</td>
<td>Space</td>
</tr>
<tr>
<td>0915400</td>
<td>Dbn Research &amp; Spons Programs</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

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

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: eResearch Proposal Management Support and Additional Training**

**Goal/outcome:**
The purpose of the module is to make the participants aware of all the resources available to help them be successful.

**Objectives:**
After completing this module, you will be able to:
- Find additional training
- Find additional help and support