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

● eRPM will be rolled out in a phased approach over three years starting in 2008.
eRPM Project Phases

● Phase 1 – Routing, approval, and submission of proposals to external sponsors, including Grants.gov
  – Electronic Proposal Approval Form (ePAF)
  – Grants.gov Proposal Preparation
  – Routing, approval, and submission of proposals to external sponsors, including Grants.gov
  – Award notification
  – Data Warehouse

● Phase 2 – Internal system integration
  – Enhance functionality by integrating with existing systems (i.e., M-Pathways, eResearch, PEERRS, and eSirius)

● Phase 3 – Routing, approval, and submission of proposals to internal funding sources

● Phase 4 – Budget development online tools
### eResearch Phase 1 – Timeline – As of 9/28/07

<table>
<thead>
<tr>
<th>2006</th>
<th>2007</th>
<th>2008</th>
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<tr>
<td>Oct</td>
<td>Nov</td>
<td>Dec</td>
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<tr>
<td>Project Start-up</td>
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</table>
- Hire project staff
- Define project plan
- Select and purchase software and hardware
- Install technical infrastructure

| Gather Requirements |
- Proposal Approval Form (PAF) and Data Warehouse reporting
- Sponsor Proposal Forms (Grants.gov and Other)
- Routing & Approval
- DRDA office procedures
- Award Notification & Changes

| Design |
- Create prototype of PAF forms - 100%
- Define Data Model (fields of information stored in database) - 100%
- Define workflow for unit routing & approval, DRDA processing, and submission to sponsor - 70%
- Determine method for defining org. roll-ups for routing & approvals - 100%
- Identify approvers and delegates - 30%
- Determine user roles and security requirements - 35%
- Design user reports - 15%
- Define email notifications - 60%

| Development & Unit Testing |
- Build user interface forms - 90%
- Build workflow states, activities, and state transitions - 35%
- Build system interfaces between eResearch and M-Pathways - 50%

| Usability & System Testing |
* Go/Delay Decision based on results:
- User acceptance testing
- System performance testing

### Key
- Complete
- On track
- Slipping
- Critical
- Not Started

### Limited Availability

### Target Go-Live
• Electronic Proposal Approval Form (ePAF)
  - A prototype of the new ePAF has been created and reviewed by the Design Teams and Departmental Advisory Team.
  - System development is underway.

• Grants.gov Proposal Preparation
  - Purchased Grants.gov Forms Library from Click Commerce.

• Routing and Approval, Proposal Submission, Award Notification
  - Workflow design for unit routing & approval, DRDA processing, and submission to sponsor is underway with design teams and DRDA personnel.

• Data Warehouse
  - The data model has been defined and development of the data warehouse dataset is underway.

• Hardware has been installed and is now being tested.

• Research UL program start-up & tasks being completed/assigned.
To design, develop, and implement eRPM, MAIS & DRDA are working with:

- Design Teams
- Departmental Advisory Team
- Research Unit Liaisons
Weekly design team meetings to vet:

- **PAF/Proposal Tracking/Data Warehouse**
  - Judy Carrillo (Internal Medicine)
  - Linda Forsyth (College of Engineering)
  - Amy Rundquist (Statistics)
  - Kate Strzempek (DRDA)
  - Ann Verhey-Henke (School of Information)

- **Proposal Routing & Approval**
  - Pat Fink (ISR)
  - Heather Offhaus (Medical School)
  - Cathy Seay-Ostrowski (Transportation Research Institute)
  - Peggy Westrick (LSA)

- **Proposal Preparation**
  - Yvonne Barber (Epidemiology)
  - Bob Beattie (DRDA)
  - Kathy Hoskins (Mechanical Engineering)
  - Robin Losee (Medical School)
  - Carolyn Pappas (ISR)
  - Colleen Vogler (Molecular, Cellular, and Developmental Biology)
Gather Departmental Advisory Team feedback regarding:
- PAF/Proposal Tracking
- Proposal Routing & Approval
- Proposal Preparation

Participation from:
- Eve Bernos (Nursing)
- Lori Bowden (Biostatistics)
- Drew Buchanan (UM - Dearborn)
- Kathy Devereux (Psychology)
- Diane Fiolek (Dermatology)
- Doreen Graden (Cariology)
- Michelle Hall (Social Work)
- Beth Lawson (Electrical Engineering and Computer Science)
- Lori Maddix (Public Policy)
- Mary Martinowicz (School of Natural Resource and Environment)
- Pennie Rutan (Pharmacy)
- Sonia Schmerl (Comparative Literature)
- Elizabeth Tropiano (Kinesiology)
- Bonni Viets (Materials Science and Engineering)
- Tina Wells (Physics)
● Research Unit Liaison program for MAIS-supported research systems is currently being developed in conjunction with the development of the eResearch Proposal Management System (eRPM).

● Some of the Research Unit Liaison responsibilities to help with the implementation of eRPM include:
  - Keep their unit informed.
  - Provide feedback, special needs, and concerns from their units to the eRPM project team.
  - Maintain eRPM system routing & approval information for their unit.
  - Form and work with a Transition Team for their schools, colleges, or units.
  - Participate in an eRPM readiness assessment.
  - Identify staff members who will need training.
Identified Research Unit Liaisons

- Art and Design, School of - Mahendra Kumar
- AVP for Facilities and Operations - Kim Kiernan
- Bentley Historical Library – Bill Wallach
- Center for Human Growth and Development (CHGD) - Donna Mulkey (Owen Jansson back-up)
- Center for the Education of Women - Catherine Mueller
- Center for Research on Learning and Teaching (CRLT) – Lori Dickie
- Dearborn Regional Campus - Drew Buchanan, (Patricia Turnbull back-up)
- Dentistry, School of - Pat Schultz
- Digital Media Commons - Theresa Short
- Education, School of - Kathy Metcalf (Alfreda Fleming back-up)
- Engineering, College of - Linda Forsyth
- Executive VP for Medical Affairs - Heather Offhaus
- Flint Regional Campus - Peggy Roddy
- Ford School of Public Policy - Lori Maddix
- Information Technology Central Services - Nancy Martin
- Information, School of - Ann Verhey-Henke (Becky O’Brien back-up)
- Institute for Research on Women & Gender - Patti Smith
- Institute for Social Research - Carolyn Pappas
- International Center - Malinda Matney
- Kinesiology, Division of - Elizabeth Tropiano
- Law School - Christina Luo
- Life Sciences Institute - Kate Blakeman
- Literature, Science and the Arts, College of - Peggy Westrick
- Medical School - Heather Offhaus
- Museum of Art - Terri Gable
- Music, Theatre & Dance, School of - Lisa Gubaci (Ron Torrella back-up)
- National Center for Institutional Diversity - Angela Ebreo
- Natural Resources & Environment, School of (SNRE) - Mary Martinowicz
- Nursing, School of - Eve Bernos (Christine Kahan Black back-up)
- Office of Academic Multicultural Initiatives (OAMI) - John Matlock
- Pharmacy, College of - Pennie Rutan
- President’s Office - Sherri Craft
- Public Health, School of - Mike Kalasinski
- Rackham School of Graduate Studies – Yvonne Bidwell
- Ross School of Business - Sally Sivrais
- Safety, Department of - Kim Kiernan
- Social Work, School of - Michelle Hall (Barbara Cobb, Candace Terhune back-up)
- Taubman College of Architecture & Urban Planning (TCAUP) - Carol Kent (Linda Mills, Sandy Patton back-up)
- U of M Hospital & Health Care Centers (UMHHC) - Heather Offhaus
- UM Transportation Research Institute (UMTRI) - Cathy Seay-Ostrowski
- University Health Services - Malinda Matney
- University Library - Anne Beaubien
- VP for Research, Office of (OVPR) - Patti Smith, IRWG; Cathy Seay-Ostrowski, UMTRI; Donna Mulkey, CHGD
- VP for Student Affairs - Malinda Matney
Info completed on PAF for a Dept ID relating to:
- Personnel
- Cost sharing
- Space
- Other Commitments
- Subproject/grant

Note: Personnel given edit access to an individual PAF can edit PAF when it’s editable. Can always view PAF during routing.
For More eRPM Information…

http://eResearch.umich.edu

Click the link to find out more...

- UL info
- Background
- Plan
- Team
- Previews

Or contact Project Managers:

**Jim Randolph**, DRDA (nihjim@umich.edu)

**Cathy Handyside**, MAIS Research Admin Systems (chandys@umich.edu)