

To: RMS Pilot Participants
Subject: RMS eProposal Pilot Update: eProposal is Going Live!
Date: September 16, 2013

Dear RMS Pilot Participants:

We are pleased to announce that we are live with eProposal!

This email provides information on:

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Logging on

Remember to go to MyAccess to log on. Select *eProposal- iRIS*. Don't forget to include eProposal in your MyAccess favorites.

Quick Guides and Other Materials Available

All of the eProposal training related documentation is copyright protected and is located at:

<\\campus\research\rms\eProposal Training>

In addition to the on-line manual* and on-line course overview, you will now find these documents:

Help Item	Target Group	Description
eProposal Quick Guide: Changing User Proposal Access	RMS	Access for everyone except RMS, GBC and IDC defaults to <i>view access</i> . ARSCs and RSCs can change an individual's access to <i>write access</i> for a given proposal.
eProposal Quick Guide: Notifications	Anyone	This helpful list shows the notifications that RSCs/ARSCs, PIs, Chairs, AORs will receive.
eProposal Quick Guide: Updating User Profiles	RMS	A short job aid that provides the steps to update PIs' profiles.
eProposal Quick Guide: Transferring PE Placeholder Proposals	RMS	Prior to using eProposal, RSCs sometimes initiate a proposal in Proposal Express as a reminder of an upcoming effort. This quick guide shows you how to update the records so we don't duplicate count them.
eProposal Quick Guide: Uploading Post Submission Documentation	RMS	RMS will frequently need to upload post submission documentation. This tells you how.
eProposal Quick Guide: Remote Access Using VPN	Anyone	Quick guide for anyone who needs to work off site and therefore enter eProposal through VPN.
Department Approver <i>Narrated</i>	PI and	A 5 minute overview prepared for the PI and

Overview (Department Approver Overview.exe)	Chair	Chair. Please play it when you have a moment so you can see what we're telling them.
Department Approver Slides (Department Approver Overview Final.pdf)	PI and Chair	A printable version of the Department Approver narrated presentation for the PI and Chair .
eProposal Quick Guide for PIs: Approving Proposals	PI	Two page job aid that shows PIs how to log on and approve
eProposal Quick Guide for Chairs/Delegates: Approving Proposals	Chair	Two page job aid that shows Chairs/Delegates how to log on and approve
eProposal Quick Guide: Self-Registration	Anyone	RSCs will give people access to a particular proposal through section 2 on the form. This job aid is in the remote situation where a PI or proposal collaborator was not given access and they need to self-register. We suggest you don't distribute this; just know it is available.

**Please note:* There is an updated version of the eProposal Training Manual in the folder, dated 091613V2.

How to get Help

Here is a reminder on how to get help during the pilot period:

- **Support to RMS and Industry Contracts/GBC for AOR functions**
 - Questions and issues will be raised via email to eproposal.support@ucsf.edu. Please first look at the manual and quick guides, or talk to a colleague, to see if you can get your answer.
 - Support team will be monitoring email and the goal is to respond within one hour.
 - Email will be monitored and triaged from 8:00am – 5:00pm Monday to Friday
- **Support to PIs and Chairs**
 - Reminder that the RSC will be the first point of contact for PI or Chair questions. If the RSC cannot assist, he/she will forward the issue via email to support team to work directly with PI/Chair
- Go [here](#) on the OSR website for a one-pager on end user support.

PI Communications

Around noon on Monday September 16th, we'll send you the email for your PIs. It will include links to where they can get the information we reference in that email. All you will need to do is forward the email! Thank you again for helping us communicate with them.

Updating the PI's Profile

As we mentioned on Friday, one of your initial tasks will be to update your pilot PI's profile to include the information needed for the grants.gov flow through. That Quick Guide is ready. See above list of materials and link to access them.

Thanks and welcome to the new software!

Your eProposal Team