

TO: RMS Pilot Participants
SUBJECT: eProposal Pilot Update October 29, 2013
DATE: October 29, 2013

Dear RMS Pilot Participant:

Greetings from your eProposal team. This email provides updates and reminders on:

[New Quick Guides](#)
[eProposal Tips/Tricks](#)
[Reminder on Browsers for Best eProposal Performance](#)

New Quick Guides

- Marking a Proposal Withdrawn in eProposal - How to change the status of a proposal to Withdrawn in eProposal.
- Marking a Proposal Submitted to Sponsor - How to change the status of a project to Submitted to Sponsor in eProposal.
- Converting to a New Form Version - How to update projects in Draft status when questions on the eProposal data entry screens have been modified.

These new quick guides are available on the iRIS Help site at <https://iris-help.ucsf.edu/quick-guides>

eProposal Tips/Tricks

- If you are experiencing issues in eProposal, please check the web browser you are using! Firefox does not work well with eProposal – Check the [listing](#) of browsers for best eProposal performance.
- eProposal was updated at the weekend to include a new question “Are federal or state (700-U) conflict of interest forms required for this proposal?” and provide an area to update the COI worksheet on the Compliance and Questions screen. Going forward, please upload COI forms on this screen.
- Samantha Yee's name will appear on the SF424 forms as the default AOR to complete the Grants.gov forms temporarily (before institutional review). When the AOR who will review the proposal has been assigned in the OR Assistant, the details for that AOR will auto-fill and replace Samantha Yee's name when they approve the proposal.
- If you submit system to system from eProposal to Grants.gov, make sure you monitor the status of your submission by clicking **Check Processing Status** on the **Submit to Sponsor** tab in eProposal. You should continue to monitor the status of the submission by clicking the **Check Processing Status** button until “Agency Tracking Number Assigned” status is displayed and the

Agency Tracking Number has been received. **You must also review the application image in eRA Commons.**

- Once you have submitted your proposals to the sponsor via the **Submit to Sponsor** tab, remember to access the **Outcome** tab and change the Project Status to “Submitted to Sponsor”. This provides an easy visual reference for all users so that it is clear the proposal was submitted. Follow these steps (see the quick guide for screenshots):
 - Click on the **Outcome** tab (at the bottom of the menu to the left of the screen)
 - Verify “Submission Outcome” has been automatically set to Submitted to Sponsor
 - Select from the “Project Status” dropdown list the appropriate submitted to sponsor status
 - Click **Save the Submission Outcome**
 - Reminder - You should not check the outcome complete box on the Outcome tab at this time.
- If you have submitted a proposal with a modular budget, please e-mail eproposal.support@ucsf.edu with the P#. During the pilot (until the issue with the modular budget figures on the PI/Chair Summary screen is resolved) the eProposal Team needs this information in order to manually update the budget figures in Proposal Express so that these reflect the Modular Budget figures.

Reminder on Browsers for Best eProposal Performance

- PCs: these are the best browsers to use based on our testing:
 - IE 8
 - IE 9
- Macs: these are the best browsers to use based on our testing:
 - Safari 6

Internet Explorer 10 (IE 10) is not compatible with iRIS - UCSF ITS recommends that users DO NOT upgrade to IE 10, as it is incompatible with iRIS and many other campus web-based systems. Contact your Desktop Support analyst if you need to be downgraded to IE 9.

Remember you can raise questions or issues via email: eproposal.support@ucsf.edu

Your eProposal Team