# PennERA – New Portal

New Portal Quick Reference Guide

**Interest Areas:** Portal

## New Terminology

What is a **Record**?

- A Record is any individual proposal, protocol, or access & routing request form that has a unique system-assigned number.

What is a **Record Number**?

- The Record Number encompasses all that were previously referred to as the Proposal Number, the Institution Number, or the Protocol Number.

Who is a **Record Owner**?

- The Record Owner can be either the PI of a proposal or the Requestee of an Access & Routing Request Form. The Record Owner is not related to who created the record.

What is the **Sponsored Projects** module?

- The Sponsored Projects module was previously called *My Proposals*. This is the module in PennERA that hosts all records for Proposal Development (PD) and Proposal Tracking (PT).

## New Locations and Functionality

*General*

- *My Profile > Edit* is now **My Profile**.
- *My Proposals > Show/List* is now **Locate My Records**
  - This displays a list of records across all modules where the user is the Record Owner.
- *My Proposals > Search For* is now **Locate Records**
  - This overlays a window with various search criteria. You need to select which module(s) to conduct your search in before the available search fields will show. Example: For proposal records, search within the Sponsored Project module.
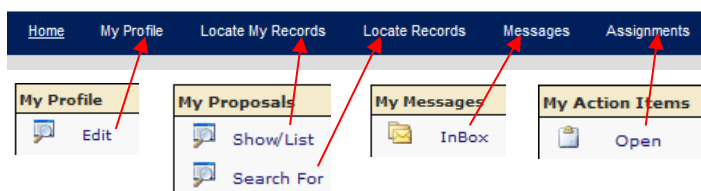


- *My Messages > Inbox* is now **Messages**
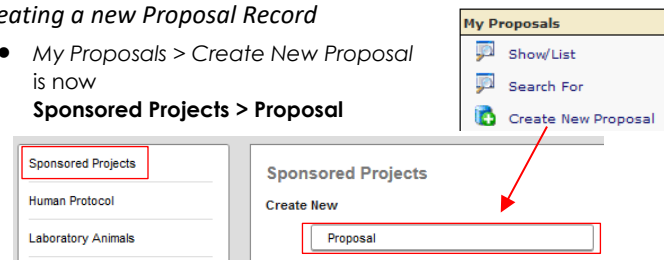- *My Action Items > Open* is now **Assignments**



- *My Proposals* is now **Sponsored Projects**
- *Human Subjects* is now **Human Protocol**
- *My Animal Use* is now **Laboratory Animals**
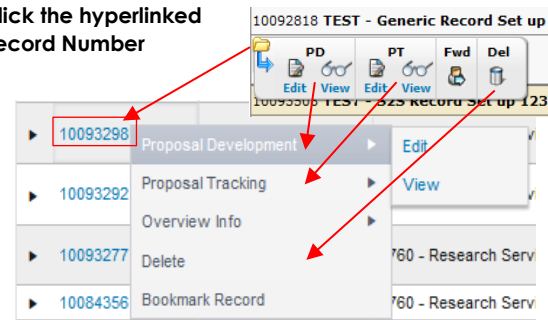- **Module Access & Routing** is unchanged
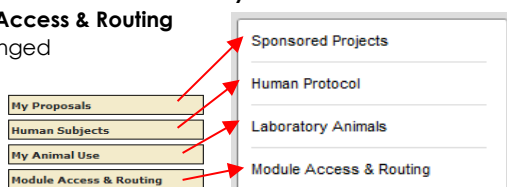


## Creating a new Proposal Record

- *My Proposals > Create New Proposal* is now **Sponsored Projects > Proposal**



## Entering a Record

- The *Open Folder* icon menu is viewable now when you **Click the hyperlinked Record Number**



## What are Widgets?

The Home page of the New Portal has five Widgets for the convenience of the user.

- **Saved Browse Template** – users can save frequently used search criteria; clicking on a saved search will overlay the Locate Records window with the saved criteria already pre-selected
- **Bookmarks** – users can Bookmark frequently used records across any PennERA module to display here
- **Proposals Due** – lists all proposal records with upcoming deadlines that the user has security access to Edit/View
- **Up-and-Coming Reviews** – lists records that are "coming your way"; meaning the records have been routed for internal review but are not yet ready for the user's review/approval step
- **Quick Links** – provides useful resources for research administration both internal and external to Penn

## Locating a Record

Locating a record can be accomplished in multiple ways, listed below.

- **Locate My Records** – list of records across all modules where the user is the PI / Record Owner
- **Locate Records** – overlays a window with various search criteria to select from
- Through some of the **Widgets** – as described above
- **Quick Find** – this search bar is located to the right side in the Portal Header and allows the user to search for records quickly with simple criteria of: PI Last Name, Record Number, Title, Sponsor, or Fund Number

## The New Portal Home Page

Below is an example of what the new portal's home page will look like when you first login. Note that the new widgets are located in the center of the home page.