

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.

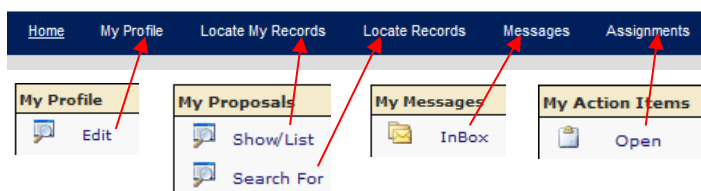
Modules available for searching across:

Animal Protocol Human Protocol Module Access & Routing Sponsored Project

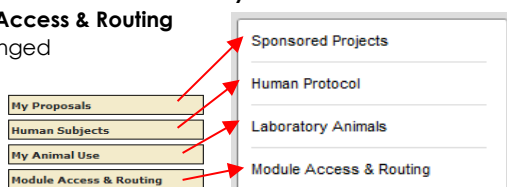
Available fields to search by Selected fields Search

<input checked="" type="checkbox"/> Record Number	<input type="checkbox"/> Creation Date	Record Number
<input type="checkbox"/> Title	<input type="checkbox"/> PI/Primary Department	<input type="text"/>
<input type="checkbox"/> Primary Associated Department	<input type="checkbox"/> Record Personnel	Principal Investigator (PI)
<input checked="" type="checkbox"/> Principal Investigator (PI)	<input type="checkbox"/> Current Prime Fund #	<input type="text"/>
<input type="checkbox"/> Status	<input type="checkbox"/> Deadline	Primary Sponsor
<input checked="" type="checkbox"/> Primary Sponsor	<input type="checkbox"/> Grants.gov ID Number	<input type="text"/>
<input type="checkbox"/> Primary Sponsor Type	<input type="checkbox"/> Open By Fund	
<input type="checkbox"/> Associated Departments		

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

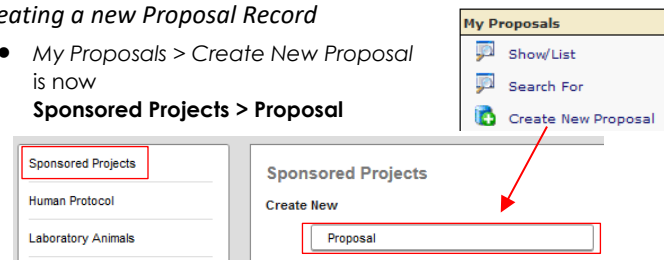


- My Proposals* is now **Sponsored Projects**
- Human Subjects* is now **Human Protocol**
- My Animal Use* is now **Laboratory Animals**
- Module Access & Routing** is unchanged



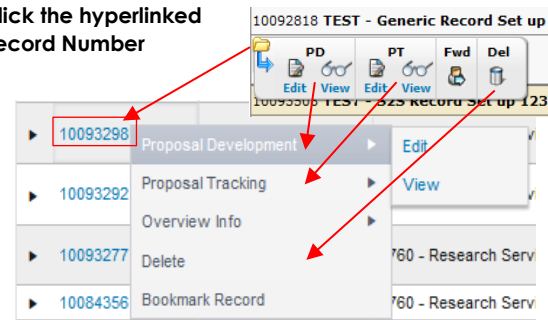
Creating a new Proposal Record

- 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.

The screenshot shows the PennERA portal interface. At the top, there is a navigation bar with links like Home, My Profile, Locate My Records, etc. The main content area is divided into several sections:

- Sponsored Projects:** A list of project categories including Human Protocol, Laboratory Animals, Module Access & Routing, and SPIN.
- Saved Browse Template:** A table with columns for Saved Browse Searches and Module.

Saved Browse Searches	Module	
Access and Routing Form Search	Module Access & Routing	Del
Open By Fund	Sponsored Project	Del
Proposal Search	Sponsored Project	Del
- Proposals Due - 3 Items:** A table with columns for Record Number, PI, Department, and Deadline.

Record Number	PI	Department	Deadline
▶ 10093312	Ford, Evelyn J	8760 - Research Services	07-Jan-2024 (61 Days)
▶ 10093301	Ford, Evelyn J	8760 - Research Services	07-Jan-2024 (61 Days)
▶ 10093304	Ford, Evelyn J	8760 - Research Services	07-Jan-2024 (61 Days)
- Quick Links:** A list of external links including Grants.gov, National Institutes of Health (NIH), National Science Foundation (NSF), Congressionally Directed Medical Research Programs (DOD/CDMRP), PennERA Proposal Development User's Guide, Office of Research Services, Institutional Review Board (IRB), and Institutional Animal Care and Use Committee/Office of Animal Welfare (IACUC/OAW).
- Bookmarks - 2 Items:** A list of bookmarked items.

Module Access & Routing	
▶ 1224	1224 - New Access Request Created by ASHLEY S DEL BIANCO on 8/2/2022 12:44:36 PM, 8/2/2022 12:44:37 PM
▶ 10084356	TEST
- Up-and-Coming Reviews - 59 Items:** A table with columns for Record Number, Module, Department, and Deadline.

Record Number	Module	Department	Deadline
▶ 10068649	Proposal Tracking	1304 - Electrical and Systems Engineering	05-Jul-2018 (1951 Days Ago)
▶ 10068653	Proposal Tracking	1304 - Electrical and Systems Engineering	05-Jul-2018 (1951 Days Ago)
▶ 10070843	Proposal Tracking	2600 - University Museum	01-Dec-2018 (1602 Days Ago)
▶ 10071689	Proposal Tracking	9607 - Institutional Real Estate	31-Jan-2019 (1741 Days Ago)
▶ 10071445	Proposal Tracking	4133 - ME-Division of Health Policy	05-Feb-2019 (1736 Days Ago)

For assistance, please contact PennERAhelp@lists.upenn.edu.