Princeton ERA:
Introduction to Princeton ERA
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1 Introduction to Princeton ERA

This is an introduction to Princeton's proposal and agreement system. It covers basic information about how Princeton ERA works and interacts with other systems on campus.

1.1 What is Princeton ERA?

Princeton ERA is the solution Princeton uses for sponsored research proposals, sponsored program agreements, and RCR training. The system will be used by department administrators, grants managers, principal investigators, and ORPA to track, workflow, approve, and submit proposals and agreements.

Princeton ERA is our customized version of two modules called Huron Grants and Huron Agreements. Our system is a SaaS (Software as a Service) solution; This means there will be continual updates and improvements to the software. You will be alerted of any major changes. This also means that we have only made limited customizations to the Huron product and cannot customize more. But as Huron community members, we will be actively engaged in requesting enhancements and future updates to the product.

It is important to note that the Awards module has not been implemented for Princeton ERA. Awards will still be setup and maintained in PeopleSoft Financials. Similarly, subaward requests and negotiations are tracked in Princeton ERA, but the PO and invoice approvals will remain in PeopleSoft.

Princeton ERA is replacing Coeus as of August 31, 2020. Coeus proposals will be available in a read only format, however all future pre-award activity will be conducted in Princeton ERA beginning on this date. No Coeus proposals have been converted. Active fully executed agreements have been migrated to Princeton ERA and will appear in the Agreements module with the pre-fix "MIG."

1.2 Princeton ERA and Other Campus Systems

1.2.1 Princeton ERA and the Hub

"The Hub" which contains PeopleSoft HCM data is the source of people and departments for Princeton ERA. Individuals or departments that exist in PeopleSoft HCM are created and/or updated in Princeton ERA via a nightly feed. Examples of updates include name changes, department transfers, or active/terminated statuses.

1.2.2 Princeton ERA and PeopleSoft Financials

Proposals are created and routed in Princeton ERA. When a proposal is funded by the sponsor, it will be interfaced to PS Financials so that it can be setup as a PS Award. The ORPA award specialists will setup the award and send the Notice of Award. Once the award has been setup in PeopleSoft, it will send a message back to Princeton ERA that marks the proposal as "Awarded" and adds the PS Award ID to the proposal workspace.

New sponsors are created in Princeton ERA and they interface to PeopleSoft. If a new sponsor is needed for creating a proposal, an ERA team member will create the sponsor in Princeton ERA so it can be used on the proposal. The sponsor will interface to PeopleSoft overnight and appear in PS sponsors the next day.

1.2.3 Princeton ERA, eRIA, and Additional Compliance Info

Princeton ERA will interact with several compliance related systems and feeds.

eRIA

eRIA is a suite of electronic management systems supporting Research Integrity and Assurance (RIA). New sponsors are created in Princeton ERA and they interface to eRIA, similar to how they interface to PeopleSoft. The sponsor will interface to eRIA overnight and appear the next day.

In the future, eRIA data for IRB protocols, IACUC protocols, and IBC registrations will be integrated with Princeton ERA. When creating a proposal, users will be able to select the protocols or registrations applicable to their protocols instead of entering them manually. Stay tuned for details about when this future functionality will be launched.

COI

Conflict of Interest disclosure and training information is available in Princeton ERA. Training information is received from CITI and disclosure information is received from Princeton's electronic conflict of interest system. Department Administrators and ORPA staff can view disclosures and training information for senior/key personnel on their funding proposal.

RCR

Responsible Conduct of Research training information is stored in Princeton ERA. Training information is received nightly via CITI and the Registrar and stored on the trainee's person record. Most users view RCR data via Info Warehouse reports and will not view the RCR information directly in ERA. Please review the RCR reporting manual for additional information.

1.2.4 Princeton ERA and the Info Warehouse

Reporting is done out of the Information Warehouse (IW). IBM Cognos is the software the IW uses for reporting. Data from Princeton ERA will be sent to the IW for funding proposals, agreements, and RCR training.

For more information on ERA Reporting, refer to the reporting training manuals.
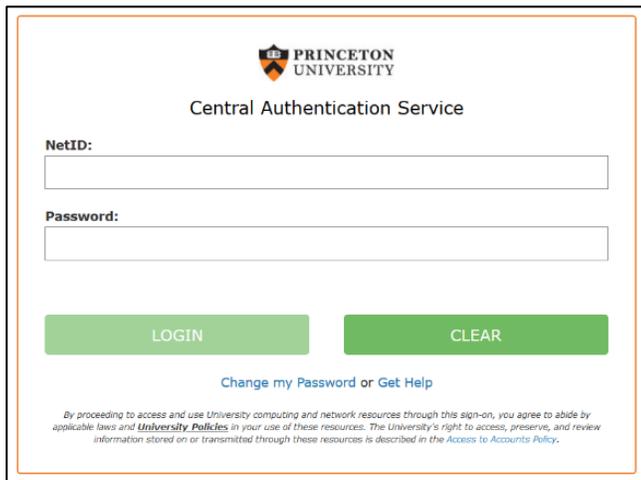
2 Princeton ERA Access and Support

This section explains how to log into Princeton ERA, who can log into Princeton ERA, and how to get support with accessing or using the system.

2.1 Logging into Princeton ERA

Log-in to Princeton ERA using the link on the ORPA Princeton ERA webpage.

Use your Princeton NetID and password to log-in.

You are now logged into Princeton ERA. You will initially be logged into the Dashboard. You can navigate between your dashboard, Grants, and Agreements.

2.2 Princeton ERA Security and Access

2.2.1 Princeton ERA Security

All members of the Princeton research community have access to the Princeton ERA system. Your role and department affiliation determine the actions you can take and records you can access.

Department Administrators

Department administrators can create and submit funding proposals or agreements in Princeton ERA.

On funding proposals, department admins can view and take action on the proposal when they are the admin contact or are listed as an editor. All department administrators will automatically default as editors for funding proposals where their department is listed as the responsible department. Department admins can view and take actions on agreements when they are the admin contact or listed as an agreement collaborator. The specific actions and updates that can be made will be dependent on the state of the agreement or funding proposal.

Department Approvers

Department approvers can approve funding proposals that are submitted for department review. They can access view only versions of the funding proposal and budget for their review. Department approvers will typically have access to all funding proposals within their department because they will default as an editor for all funding proposals where their department is listed as the responsible department.

ORPA

ORPA staff will have access to all proposals and agreements within Princeton ERA. ORPA GCAs will be able to workflow, approve, and submit funding proposals and agreements. ORPA Award Specialists will be able to view all funding proposals and agreements; they can update awarded funding proposals status and interface them to PeopleSoft for award setup.

Central Administrators

Central administrators within the research community may be granted access to view all funding proposals and agreements.

2.2.2 Request Access to Princeton ERA

To request access to Princeton ERA, the user's department, business, finance, or grant manager should fill out the Princeton ERA Access request on the ORPA Forms page and email it to erasupport@princeton.edu

2.3 Support

If you have questions regarding the Princeton ERA system or need assistance, please email erasupport@princeton.edu.

If you have questions regarding the content of your proposal or agreement, please reach out directly to your department's ORPA GCA for assistance.

To find or review Princeton ERA trainings, please visit www.princeton.edu/training.

3 Overview of the System

This overview contains infomration about funding proposals and agreements, important system terms, and an introduction to basic navigation within the system.

3.1 Funding Proposal and Agreement IDs

Funding Proposals: Proposals in Princeton ERA are called funding proposals and are created within the grants module. Each funding proposal has its own record. Funding proposals may be called "FP" for short and are identified by their FP ID which is a 10-digit alphanumeric value starting with FP (e.g. FP00000001). All funding proposals are automatically numbered sequentially.

FP00000001

- **Budgets:** Funding proposals may have one or multiple budgets. They may also have associated cost sharing budget or subaward budgets. The budgets will be linked to the funding proposal. Budgets will be identified by a 10-digit alphanumeric value starting with BU.

    BU00000661

- **SF424:** Proposals that will be submitted system-to-system will have an associated SF424 record. The SF424 will be linked to the funding proposal. It can be identified by the SF424 ID which is a 15-digit alphanumeric value starting with SF-424.

SF-42400000057

Agreements: Agreements such as research agreements, subawards, or data sharing plans are created within the agreements module. Each agreement has its own record. Similar to FPs, agreements can be identified by a 10-digit alphanumeric value. The prefix of the agreement will be based on its type. All agreements are automatically numbered sequentially within their agreement type.

RA00000012

3.2 System Terms and Definitions

Terms	Definition
Dashboard	The Dashboard is the landing page when you log into Princeton ERA. It is a starting point for creating proposals and agreements or finding items. The dashboard lists your items which needs specific action or have been recently reviewed. You can select the create button to begin a new submission.
Workspace	Each funding proposal and agreement has its own workspace. The workspace is a view that contains summary, links, status images, and tabs of relevant information regarding that proposal or agreement. "Workspace" is the term for this page and has nothing to do with Grants.gov Workspace.
SmartForm	Users complete a SmartForm for each proposal, agreement, or budget. SmartForms are online forms that contain a series of questions to collect demographic and budgetary information for the submission.

They are called "Smart" forms because they hide/show different questions based on how certain questions are answered. This is also called "branching." |
Workflow	Funding proposals and agreements will move through workflow until they are awarded, terminated, or activated. Workflow refers to the process of moving a submission through the system.
Activities	Users execute activities for a funding proposal or agreement on the workspace. Activities are actions that can be taken by the user for that submission. Some actions include moving the submission through workflow, other actions may include checking compliance info or sending notifications.
Notification	Notifications are email messages that will be sent from Princeton ERA to Outlook email.

3.3 Basic Navigation

This section will provide you an introduction to basic navigation of the system. Manuals on creating a funding proposal and agreement provide in depth step-by-step instructions.

When you log into Princeton ERA, you will be presented with your **Dashboard.**

The Dashboard will show you a list of all funding proposals or agreements that you can take action on (My Inbox) and just those requiring review action (My Reviews)

From the Dashboard, you can select create to start a new proposal or agreement.

Select the Grants tab. Under Funding Proposal, you will see all of the funding proposals that you have access to.

This view lists all of the proposals you have access too, not just those requiring action.

You can view the different tabs which sort the proposals by their state, or you can use the search filters to locate a proposal. You can also create a new funding proposal on this page.

Select the Agreements tab. Just like with Grants, this tab can be used to view all of the agreements that you have access to listed.

You can view the different tabs which sort the agreements by state or search using filters. You can also create a new agreement on this page.

If we select an agreement or funding proposal from either of these lists, we will be brought to its workspace. In the example below, we select a funding proposal.

On the workspace, we can see a summary of information about the funding proposal. We see that it is in Draft state and we can see exactly where it is in the workflow process.

We click Edit Funding Proposal to view the funding proposal SmartForm.

Depending on the state of the proposal or the user logged in, this button could also display as "View Funding Proposal" and would display a view only version of the SmartForms.

The SmartForm displays information about the submission.

We exit the SmartForms to return to the workspace. On the left side of the workspace, we can view the **activities** that are available for this funding proposal.

To execute or review an activity, we click the activity and complete the relevant steps in the pop-up window.

Submit For Department Review

Ancillary Review

Review Type	Person	Organization	Required	Completed	Accepted
Assurances	Ceclia Pratt (testpi3)		yes	yes	yes

Endorsements

I will abide by applicable sponsor and Institution regulations in the conduct of the program, including provision of timely reporting per terms of the award. For multi-year awards with automatic renewals (no interim progress reporting required), this form will serve the term of the award.

PRINCIPAL INVESTIGATOR/PROGRAM DIRECTOR ASSURANCE: I certify that the statements herein are true, complete and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of this application.

<u>One</u> of the following options must be selected:

1. As PI/PD for this submission, I approve the above endorsements: ☐

2. As a member of this proposal team, I will obtain the PI/PD's signature for the endorsements: ☑

OK Cancel

For step by step instructions on creating a funding proposal, agreement, or subaward request, please refer to the associated manual.