

Princeton ERA: Tips & Tricks

Last Updated November 2, 2020.



Searching in Princeton ERA

There are many different areas in Princeton ERA where you can search for a value such as searching for a proposal, an agreement, a sponsor, or a PI. Princeton ERA searches within the system for items that “begin with: the value you type.

- To widen your search, you can use the % to search for anything that contains the value you enter.
 - Search “%California” when looking for a sponsor to return all sponsors that have California in their name
 - Search “%101” when looking for a proposal to return all proposals that end with “101”. This could be used if you are looking for FP00000101 but do not want to type the full ID.
- To ignore certain results in your search, start the search with !=
 - Search “!=FP” on your Dashboard – My Inbox filter to ignore any FPs in your Inbox. This would allow you to only view the agreements in your Inbox.

Sending Emails from Princeton ERA

Emails can be sent for Princeton ERA by using the Send Email activity on a proposal or the Contact Owner activity on an agreement. Send Email can be used to generate an email from erasupport@princeton.edu to any Princeton person. Contact Owner can be used to specifically contact the agreement owner, which is your ORPA GCA or ORPA subaward team member. Sending emails within the system is beneficial because it logs the email on the History tab of the record, which means the information can be easily tracked and referenced later.

When sending emails within the system, ensure you include the proper recipients and a Subject Line that makes it apparent this is not a system generated email. Additionally, since the email sent will come from erasupport@princeton.edu, it’s important to sign your name so they know who the message is from.

Adding ancillary reviews will also generate email notifications for the reviewers. For detailed instructions on adding an ancillary review, see the [“Ancillary Review – Add/Manage” Quick Guide](#). It’s important with ancillary reviews to log any comments on the Manage Ancillary Review and Add Ancillary Review pages so that your comments appear on the History tab and within the email notification. Remember to sign your name in the comments to your reviewer knows who the review is requested by.

Receiving Email from Princeton ERA

Emails from Princeton ERA will come from erasupport@princeton.edu. Some emails are system generated, such as when a proposal changes certain states or an agreement is reaching its Expiration Date. Other emails may be created by user actions such as using Send Email or Manage Ancillary Reviews.

If you need to respond to an email that you received from Princeton ERA, do not respond directly to the email from erasupport@princeton.edu. This will create an ERA Support Help Desk ticket. Instead, use the Send Email (Proposals) or Contact Owner (Agreements) activities within the system to respond. This will log the communication on the History tab of the record for future reference.

Copy Proposal or Agreement

Funding proposals and agreements can both be “copied.” Copying the record allows you to start a new proposal or agreement record that will retain most of the information you entered on a prior record. This is helpful when creating a proposal or agreement similar to one you’ve already created.

To copy a funding proposal, use the “Copy” activity that appears on the left side of the screen. To copy an agreement, use the “Copy Agreement” activity that appears on the left side of the screen.

Princeton ERA Admin Contact

Each funding proposal and agreement should have an “Admin Contact” listed. On an agreement, the Admin Contact will default on the Agreement Upload page to the person creating the agreement. This can be updated if needed. On a funding proposal, the Admin Contact must be entered on the SmartForm Personnel Page in the Administrative Personnel Section.

The Admin Contact is the grants manager or department administrator responsible for working on this proposal or agreement. Entering this person as the Admin Contact within the system is important because the Admin Contact will receive all notifications regarding the progress of the proposal or agreement, including any clarifications or requests for additional information.

Please be aware that if the Admin Contact is left blank on a proposal, the notifications will be sent to the PI which can be confusing when action is really required from the grants manager.

Help Text

Help Text is provided throughout the Princeton ERA SmartForm pages. To view the help text, click the blue bubble with a white question mark and a new window containing the Help Text will appear. This text provides additional information or resources on how to answer the SmartForm questions.

If you are unclear on how to answer a question, please reach out to your ORPA GCA for additional guidance.