Initial View

My Open Action Items
- Proposals awaiting review (information copy) or approval.

Locate existing records
- PIs can click on Show/List link.
- Click Search For to enter search terms.
- All results are based on user’s security (assigned orgs).
- After entering keywords, click ‘Locate’ the search screen.

Basic searches

- List all proposals to which user (non-PI) has access:
  Keywords: Don’t enter any keywords.
- Find a specific proposal:
  Proposal number: 10020000 or 3599999
- Can’t remember the entire number?
  Proposal number: 1003 or 599

Results: All proposals beginning with “1003” or Fund numbers beginning with “599”.
- All proposals for a specific PI:
  PI: WILSON
  Results: All proposals with PI last name = “Wilson”.
  It is not necessary to locate the PI’s name in a picklist, though that option is available.

Advanced searches – Click on ‘Show Additional Search Options’ at the bottom of the basic search screen.
Results – Any column heading may be selected to sort the results in ascending or descending order.

View/edit an existing record
- Locate the record using the search techniques.
- Mouseover the folder icon, click the appropriate access icon.

Updated Referenced Website
http://www.upenn.edu/researchservices/PennERA.html

Login
https://www.pennera.upenn.edu

Basic S2S Record Creation
- Most steps are identical to the current version of PennERA.

Locating a Funding Opportunity (FOA)
- When search screen appears, the best option is to enter the FOA number.

Basic Generic Record Creation
- The Generic Sponsor Form Quick Ref guide contains instructions for proposal creation and record completion.
http://www.upenn.edu/researchservices/pdfs/QuickRef%20Generic%202010-12%20update.pdf

Proposal Tracking
- Most functions remain the same, but navigation has changed.

Need help? PennERAhelp@lists.upenn.edu