CU BOULDER – eRA InfoEd

eRA Enable Portal – Tips and Tricks

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Preface:
The updated eRA Home Page – the "Enable Portal" – in eRA provides users with a new landing page and ways to work within the eRA system. While activities within an actual protocol in eRA will be much the same as before the update, how you access your studies will be significantly different. This guide describes some of these differences, and ways to maximize your eRA experience.

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Navigating to and accessing your studies

Creating new human research studies, and accessing your existing research studies starts by selecting Human Subjects on the left hand navigation menu:

This will open the Human Subjects page:

- Current records are found using either the Search button or Show My Records button. Information about those functions can be found by clicking the links above.
- New studies may be created by clicking the Create New Protocol button. Follow the eRA Submission Guide - Initial Application to create a new Protocol.

Accessing Studies and the Fly-out Menu:

Whichever route you use to access studies, they are now opened by using a "Fly-out Menu". To access a study:

Step 1: Click on the blue link (generally the Record Number) for the study that you wish to access. This will open a Fly-out Menu:
Step 2: There are several options within this menu select as appropriate:

- **Edit** – When available, hovering over this option will cause a Fly-out to appear, providing submissions which can be accessed to edit or submit to the IRB for review.

- **View** – This option will show a Fly-out that allows a user to access a view-only version of the study record and submissions.

**NOTE:** For both of the above options, clicking on **Master Record** will take the user to the Submissions page for the protocol in eRA.

- **Create New** – this option will allow a user to create an entirely new Submission within the selected Protocol. Caution: DO NOT use this option to Respond to a request for Modifications or an Incomplete submission. Review the appropriate eRA Submission Guide for detailed instructions on these procedures.
- **Info** – Provides general information regarding the study.

- **Bookmark Record** – Links the study to the Bookmark Widget (see below).

**Search**

**Step 1:** Clicking the **Search** button on the Human Subjects page opens the Search Window.

**Step 2:** Select the criteria you wish to search on by clicking the box next to that criteria. A search field will be displayed on the right side of the window.

**Step 3:** Enter the information that you will be searching on, then click the **Search** button.

- Note that for many search criteria, how the search functions can be modified by clicking the equal sign next to the search field, and selecting a different option:

**Step 4:** In the Search Results, the Fly-out Menu can be accessed for the desired study as described above. More information about managing search results is found below.
Show My Records
Clicking the Show My Records button will provide a listing of all records on which you are the Principal Investigator. Note, if you are not the Principal Investigator of a study, then you will need to use the Search function instead. All of the same functions as described above are used to access your study in the Show My Records page.

The Quick Find function
In the top right corner of the main eRA page, you'll find the Quick Find function. If you know the specific Protocol (Record) number, PI Last Name, or key words in the title of the study you are looking for, you may enter it in this field. Clicking the magnifying glass or hitting enter will search for that information to be displayed in a Search Results screen if available. Please note that the Quick Find function searches across multiple eRA modules used by CU Boulder. Because of this search results may take slightly longer to return, and may include records other than only Human Subjects.
Your eRA Home Page
Upon logging in to the eRA system, users will land on the Home Page. This page has been designed to provide several easy to use Widgets. Several of the most common widgets for Human Subjects/IRB users, and how to set them up, are described below.

Activating Widgets
**Step 1:** Click the Portal Configurations button in the lower right corner of the eRA Home Page.

**Step 2:** Select the widgets that you want to see on your home page. Some widgets are mandatory and cannot be removed. Other available widgets are geared to Contracts and Grants users, and most widgets can access any of the modules that use the eRA system (if you have funded research, these may be useful to you as well). The IRB suggests the following:
- Bookmarks
- Messages Widget
- Save Browse Template

Select **Enable** from the drop-down for Double-wide Widgets, or click the **Use** link for Single-width widgets:
Step 3: Widgets can be moved around your Home Page by clicking the arrow buttons next to the Widget name.

Step 4: Click the Save button.

More information about specific widgets is covered next.
Messages and System Messages:
These windows provide direct access to messages sent through the eRA system.
- **Messages** will include email messages sent by the IRB through eRA, such as Approval Letters, Modifications Required Letters, and Continuing Review Reminders, as well as automated messages, such as Faculty Advisor Review notifications.
- **System Messages** will display information regarding eRA System Status, such as down-time notifications.

Bookmarks

Studies may be bookmarked on your Home Page following these steps:
**Step 1:** Locate the study you wish to bookmark using the [Search](#) or [Show My Records](#) functions as described above.
**Step 2:** Click the Record Number to open the Fly-out Menu.
**Step 3:** Click the Bookmark Record link at the bottom of the Fly-out Menu. The link will change to indicate "Bookmark Added".

The Fly-out Menu, with any options that you have available based on your access to a study, will be available in the Bookmarks Menu on the Home Page. Click the Record Number to open the menu.
A bookmarked study may be removed from the Bookmarks Widget by clicking **Remove Bookmark** at the bottom of the Fly-out Menu.

**Saved Browse Template**
The Saved Browse Template provides quick access to your most common Search fields, directly from the Home Page. To set up a Saved Browse Template, follow these steps:

**Step 1:** Open the Human Subjects page, and click the **Search** button to open the Search Window.

**Step 2:** Select the criteria that you want included in this template, then click the **Save** button in the top right of the Search Window. A Save Search pop-up will appear.
Step 3: Enter a name for your search template, and click **Save**.

![Save Search](image)

Step 4: Click **Close** in the Search Window to close the window. The Saved Browse Template Widget on your Home Page will now include this search.

![Saved Browse Template](image)

Step 5: Clicking the name/link for that search will directly open the Search Window with those options pre-selected.
The Kendo Grid and Managing Search Results
Search results are returned in a "Kendo Grid" format. The Kendo Grid provides for a variety of sorting and filtering options. The information in this section also applies to several other locations where the Kendo Grid format is used, including the "Show My Records" page and the "Action Items" Page. Some features in the search results display include:
1. Select the number of items to be displayed on the page.
2. Click the "caret" to display additional details for a submission.
3. Click on the column heading to change the order in which information is displayed, based on that heading.
4. Click on the Record Number to access Fly-out Menu options to manage the study (note, this does not apply in the Action Items page).
5. Export to Excel creates a spreadsheet with the search results.

To Group studies by a column header, drag that header to the location indicated.

In addition to the options above,
1. Use the caret by the header to minimize or expand a group.
2. Change the order of the groups by clicking on the column label at the top of the search results.

![Table and list of search results with column labels highlighted](image)