Commons Version 3.01.01.0 Release Notes

New Features

Commons

Changes to the eRA Commons Look

The eRA Commons has undergone a technical refresh, which has updated and enhanced various parts of the module including the login, registration, and home pages.

Figure 1: New Commons Welcome Screen

New Commons Login Screen

eRA has updated the look of the *Commons Login* screen. Commons users should enter their **Username** and **Password** as they normally do, however, this area of the screen has changed. There is no change to the functionality of logging into Commons.

Figure 2: New Commons Login Screen

Changing the Displayed Affiliated Institution

PIs affiliated with more than one institution can select which institution to work with after logging into Commons.

To select a specific institution to work with in Commons:

1. Log into Commons.

If affiliated with multiple institutions, the name of the default institution displays as a link within the **Welcome** section located in the upper right corner of each Commons page.

2. Click on the name of the institution.

Figure 3: Institution Name Displayed as a Link for Multiple Affiliations

The *Change Affiliation* screen opens. This screen lists the names of all institutions with which the PI is affiliated.

3. Select the radio button of the institution.

4. Click the **Submit** button.

Figure 4: Change Affiliation Screen

The Commons Homepage displays, with the **Institution** fields updated to the selected affiliated institution.

Figure 5: Selected Institution Displayed with User Information

The grant and institution information displayed on the Commons screens is for the selected institution only. To switch to another institution, repeat the steps above.

Delegations Now Performed from One Central Location

A new delegations feature in Commons allows users to delegate all available types of tasks to a user (or users) within one place. The new **Delegations** tab located within the **Admin** menu opens the *My Delegations* screen from which Commons users can assign, revoke, review, and manage all of their delegations. It is no longer necessary to delegate certain types of tasks on one screen and others on another. Commons users delegate (and revoke) every type of available authority from the new *My Delegations* screen.

To access *My Delegations* and perform the steps for granting or revoking authority for your own account, perform the following steps:

1. Select the **Admin** menu tab from the Commons navigational bar.

2. Select the **Delegations** option from the **Admin** menu.

The *My Delegates* screen opens. If applicable, the **My Current Delegations** area of the screen displays a table of existing delegations. This table indicates *No Records Found* if no delegations exist. The screen lists the authority available for delegation.

1. Select the link called **Search or Add Delegate**.

Figure 6: My Delegates Screen – Search or Add Delegate Link

2. On the *Search for Delegates* screen, enter the appropriate search criteria for conducting the search. If necessary, the percent sign (%) may be used as a wildcard character. Hold down the **CTRL** key when selecting **Roles** to select more than one.

3. Select the **Search** button.

Figure 7: Search for Delegates

4. Click the **Select** link for the user to whom you are delegating authority.

Figure 8: Select Link on the Search for Delegates Search Results

The *Delegate Authority (Authorities)* screen displays with a confirmation as follows: *You have selected to delegate access to: [Name, Commons ID, Role].*

The available authorities for delegation display with checkboxes. The authority available for delegation differs depending on your Commons role and the role of the selected user.

5. Mark the checkbox of the specific authority being delegating (e.g., **PPF**) for the user being delegated. Multiple authorities may be selected if available.

6. Select the **Save** button.

Figure 9: Delegate Authority (Authorities) Screen

Commons grants the specified authority for the selected users, who receive an email informing them of the change. The **Search Results** area updates with the assigned authorities marked.

Figure 10: Delegated Authorities Displayed in Search Results

7. Select the **Return to My Current Delegations** link to return the *My Delegates* screen.

My Current Delegates shows the delegated user with a checkmark in the associated column for each authority granted.

Figure 11: My Current Delegations with Added Delegate

NOTE: To revoke authority, select the user from within the My Current Delegations table and uncheck the box for the authority being revoked.

For more information on the new My Delegates screen, please refer to the *eRA Commons User Guide* located online at: http://era.nih.gov/commons/user_guide.cfm.

Delegate Authority on Behalf of Another Using My Delegates

SOs may use the My Delegates screen to delegate authority on behalf of another Commons user. SOs may delegate Progress Report authority on behalf of a Principal Investigator (PI) or Sponsor authority on behalf of an xTrain Sponsor user.

To delegate authority on behalf of another:

1. Select the **Admin** menu tab from the Commons navigational bar.

2. Select the **Delegations** option from the **Admin** menu.

The *My Delegates* screen opens. If applicable, the **My Current Delegations** area of the screen displays a table of existing delegations. This table indicates *No Records Found* if no delegations exist.

3. Select the appropriate link: **Delegate Progress Report** –OR– **Delegate Sponsor**.
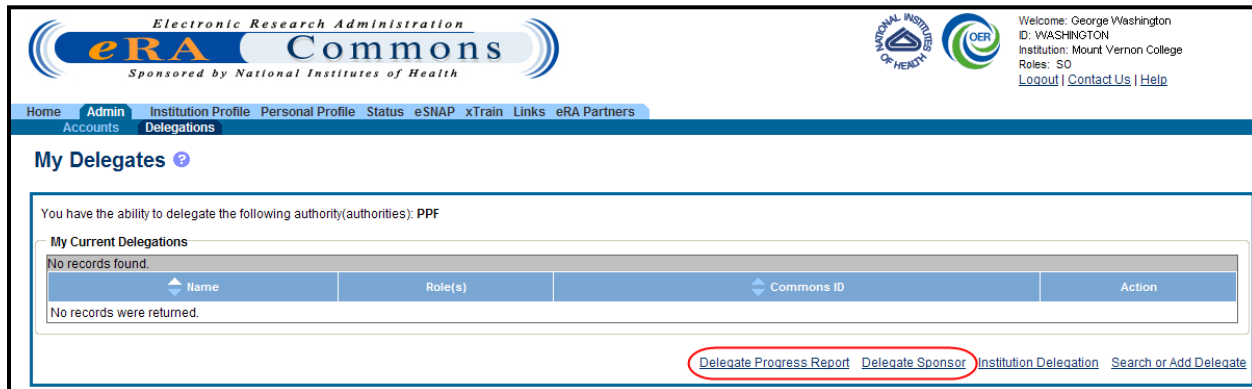

Figure 12: My Delegates Screen – Delegate Progress Report Link

The *Delegate Progress Report* or *Delegate Sponsor* screen opens with search criteria displayed for locating and selecting a specific Principal Investigator/Sponsor on whose behalf the authority is being granted.

4. Enter the appropriate search criteria using the wild card (%) if necessary.

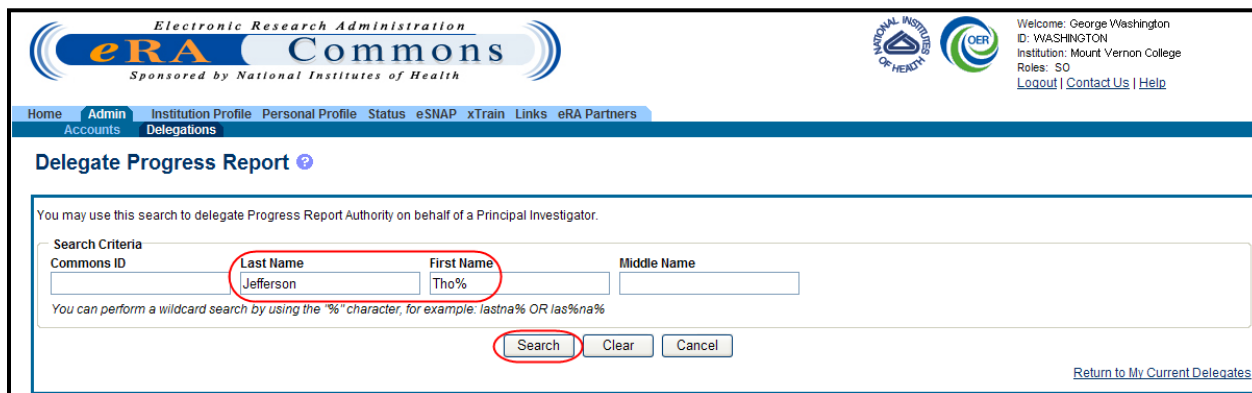5. Select the **Search** button to perform the search.

Figure 13: Search to Delegate Progress Report Authority on Behalf of a PI

6. From the matching search results, choose the **Select** link to indicate the Commons user on whose behalf you are designating authority.

Figure 14: Delegate Progress Report Third Party Delegator Search Results

A message displays at the top of the screen as follows: *You have selected to delegate [Progress Report –OR– Sponsor] Authority on behalf of:[Name]*.

Additionally, search parameters display for searching and selecting the user to whom to delegate the authority.

7. Enter the search parameters necessary for locating the Commons user being given authority and select the **Search** button.

The matching records display in the **Search Results** table.

8. Click the link called **Select** to select the appropriate person from the list.

Figure 15: Delegate Progress Report Third Party Delegatee Search Results

The *Delegate Progress Report* (or *Delegate Sponsor*) screen shows the selected name with the authority and checkbox.

9. Mark the checkbox.

10. Select the **Save** button.

Figure 16: Delegate Progress Report Screen and Checkbox

The **Search Results** area updates to show the authority marked with a check. Commons grants the authority for the delegated user, who receives an email informing of the change.
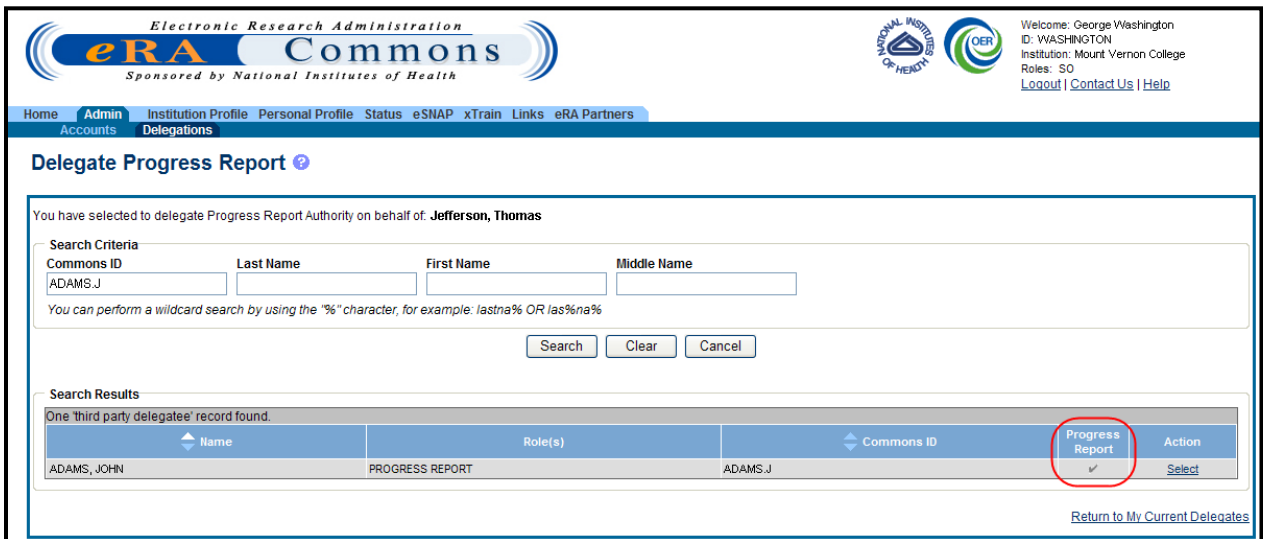
Figure 17: Updated Search Results Show Progress Report Authority for Selected User

The Commons user, on whose behalf delegation was granted, can see the delegated user by accessing the **My Current Delegations** information.

For more information on the new My Delegates screen, please refer to the *eRA Commons User Guide* located online at http://era.nih.gov/commons/user_guide.cfm.

Changes to Institution Registration

Changes have been made to the Institution Registration process and form. A new link for registering institutions exists in the top right area of the *Commons Login Page* called **Register Grantee Organization**. Selecting this link opens the new *Registration Form*. Signing Officials

(SO) use this form to provide institution information and set up accounts in Commons for the SO and Account Administrator (AA). Two changes have been made to this process:

- Fax numbers are no longer required when completing the form

- SOs and AAs receive individual emails providing account information after registration. One email is sent to the SO indicating the Username for that account. A separate email is sent to the AA indicating the Username for that account. Both the SO and AA each receive a second email providing a temporary password for accessing. After logging into Commons using the temporary password, the SO and AA must change their passwords to one of their choosing.

NOTE: Previously, the Usernames for both the SO and AA were sent within one email to the SO with the temporary passwords for both accounts sent together in another email to the SO.

xTrain

New Process for x Train Self-Registration

The process has changed for xTrain Users self-registering for eRA Commons and xTrain access. Formerly, when setting up a new account in Commons, xTrain users had the ability to select their password at the time of the account creation.

In the new process –aligned with the process that other Commons users have been following– xTrain users receive a series of emails directing them through the process of creating their account. The first email invites the user to create an account in Commons.

At the completion of this step in the process, a second email confirms that the user has completed the prior steps. Following this confirmation, NIH Data Quality evaluates and approves of the account request, and sends a third and fourth email.

The third email notifies the user that the account is active. The email includes the new Commons User ID. The fourth email includes a temporary password for accessing Commons. After successfully logging into Commons with this temporary password, the user is prompted to change the password. Users can choose their own password at this time.