

## Department Administrator User Guide

### Your Dashboard

#### MY ACTION ITEMS Tab

Listed here are any items that are assigned to you (the logged on user) for action.

1. To open your Action Item, please click on the [blue hyperlink](#) located in the first column titled "ID#".
2. Any items that are in **bold** are new items that have not yet been reviewed.

Listed on the left-hand navigation menu are the following:

3. Clicking on Reports opens up a menu of various reports you can run, such as Other Support Reports for NIH, your department list of proposal submissions, etc.
4. If you are responsible for sub-recipient monitoring, you may process and monitor those sub-awards here.
5. Clicking on Help & Support directs you to the DoResearch where you can access SeRA user guides, news and updates.
6. The eCertification Payroll Distribution link aids in compliance of Federal Government requirements.
7. Pre- approved IDC waivers (READ-ONLY) can be viewed here. If you have any changes that need to be made, please contact the Dean of Research office. *(Please note that these waivers are also available on <https://sera.stanford.edu/IDC>)*

Stanford Electronic Research Administration

 Search: SPO #  
ANABELV  
Sign out

Dashboard

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- Help & Support 5
- Certify Annual Payroll Distribution 6
- IDC Waivers 7

### MY DASHBOARD

My Action Items
My Projects
Pipeline
Proposals

#### My Action Items

Listed below are all of the Items that are currently assigned to you for action. Click on the blue link in the first column to open your Action Item. Reset Sort

ID# <span style="background-color: #800000; color: white; border-radius: 50%; padding: 2px 5px; font-weight: bold;">1</span>	Process Type	Action Item	SPO #	PI	Sponsor	Project Title	# of Days Assigned	# of Days Open	Flag
<a href="#">PR564070</a>	Proposal - New	Prepare PDRF		Velasquez, Anabel			154	154	☞
<a href="#">PR556336</a>	Proposal - New	Prepare PDRF		Velasquez, Anabel	GOODHILL FDN (GDHILL)	test animal care	182	240	☞
<a href="#">PJL561596</a>	Project Log	<b>Project Log</b> <span style="background-color: #800000; color: white; border-radius: 50%; padding: 2px 5px; font-weight: bold;">2</span>	112800				184	184	☞
<a href="#">PTA556852</a>	Account Setup Early/Extend	Prepare Account - Dept	112823	Velasquez, Anabel	National Institutes of Health (NIH)	RAS-4995	234	234	☞

## Department Administrator User Guide

### MY PROJECTS Tab

Administrators who have access to an organization in SeRA will also have access to the “My Projects” tab. The same categorical sections will be available for administrators, and they will be able to select a view for a particular PI, or for all PIs within their organization.

### PIPELINE Tab

The “PIPELINE” tab allows you to see items that you have worked on.

1. The default view shows “All Active” transactions that are open and assigned to another user. You may change the view by clicking the drop-down menu for “Show Only” and change it to “Completed in the last 90 days” or to “Terminated”.
2. The “Assigned To” column shows who currently has the transaction.
3. To open the transaction and view further details, please click on the [blue hyperlink](#) located in the first column titled “ID#”.

ID#	SPO#	PI	Project Title	Sponsor Deadline	Assigned To	Deadline No of Days	Flag
PR568203	114692	D'Amico, Simone	Stanford Nano Picture Satellites (SNAPS) Deployment	16-JAN-14	Bergman, Sharon	-86	☞
PR522452	107467	Davies, Philip A.	TESTING For Andy's general knowledge	-	Chen, Noreen	-	☞



### Department Administrator User Guide

#### PROPOSALS Tab

**\*Note that this tab is a standard tab for ALL users**

1. The “PROPOSALS” tab is similar to your “My Action Items” tab but filters out **only proposals that have YOU listed as a PI.**
2. There is now an additional column titled “Sponsor Deadline”. This date will display only if it has been filled out in the **Admin & Sponsor Details** section of the proposal.

Stanford Electronic Research Administration
Search: SPO #   ANABELY Sign out

**Dashboard**

Initiate New Proposal

Reports

Subawards

Help & Support

Certify Annual Payroll Distribution

IDC Waivers

### My DASHBOARD

My Action Items
My Projects
Pipeline
Proposals

#### My Proposals Action Items

row(s) 1 - 7 of 7

ID#	Action Item	Agreement	Proposal	SPO #	PI	Attach Update	Sponsor	Sponsor Deadline	Deadline No of Days	Flag
PR564070	Prepare PDRF	Fellowship	New		Velasquez, Anabel					☞
PR563336	Prepare PDRF	Contract	New		Velasquez, Anabel		GOODHILL FDN (GDHILL)			☞
PR530166	Institutional Review	University Research Agreement	New	SPO-112800	Velasquez, Anabel		National Institutes of Health (NIH)			☞
PR533010	Approve PDRF (PI)	Clinical Trial	New		Velasquez, Anabel		California Institute for Regenerative Medicine (CIRM)			☞
PR546283	Proposal Revision	Grant	New	SPO-106030	Velasquez, Anabel		Coherent, Inc. (COHERENT)			☞
PR545572	Prepare PDRF	Contract	New					29-OCT-2013 05:00:00 PM	-165	☞
PR532664	Prepare PDRF	Subcontract	New				Federal Bureau of Investigation (FBI)			☞

[Download to Excel](#)

Agreement type: Contract

**PDRF #:** PR545572

**Assigned to:** Velasquez, Anabel

**Status:** In Progress

### ADMINISTRATIVE & SPONSOR DETAILS

#### Proposal - New

#### ADMINISTRATIVE DETAILS

Proposal Start Date:

Proposal End Date:

Project Activities (Choose all that apply)  Research  Training/Instruction  Other Sponsored Activity

Proposal Title:

Proposal Nickname:

Which Department/Lab/Institute is submitting this proposal?

Department Contact:  Name  Email  Phone

#### SPONSOR DETAILS

Sponsor:

Sponsor Reference Number:

Sponsor Deadline?  Yes  No

Date:  Time:  Time Zone:

0 Business Days until Sponsor Deadline. Does not account for Stanford holidays or non-business days

Internal Deadline:

Requested Completion:

Submission Method:

Check this box to enter sponsor mailing address

Check this box to enter sponsor budget contact information

Is this proposal in response to a solicitation (e.g. Program Announcement, RFP, BAA)?

[Next>>Other Stanford Faculty](#)

**Department Administrator User Guide**

**Initiating, Preparing, & Approving a PDRF**

**STEP 1: INITIATE A NEW PROPOSAL or ACCESS ONE ASSIGNED TO YOU**

**New Proposal:**

- Log into the SeRA web portal at: <https://sera.stanford.edu/>
- Click on the left hand navigation of your Dashboard titled “Initiate New Proposal”

**Proposal Assigned to You ("Prepare PDRF" task):**

Click the link in the email notification sent to you

or

Log into the SeRA web portal at: <https://sera.stanford.edu/>

Click on the blue PDRF number in the **ID#** column for your "Prepare PDRF" task

**Stanford Electronic Research Administration** Search: SPO# [ ] ANABELV Sign out  
Advanced Search

**MY DASHBOARD**

My Action Items | My Projects | Pipeline | Proposals

**My Action Items**

Listed below are currently assigned to you for action. Click on the blue link in the first column to open your Action Item. Reset Sort

ID#	Action Item	SPO #	PI	Sponsor	Project Title	# of Days Assigned	# of Days Open	Flag
<a href="#">PR568690</a>	Proposal - New					0	0	☐
<a href="#">PR564070</a>	Proposal - New		Velasquez, Anabel			154	154	☐
<a href="#">PR556336</a>	Proposal - New		Velasquez, Anabel	GOODHILL FDN (GDHILL)	test animal care	182	241	☐

## Department Administrator User Guide

### STEP 2: PREPARE THE PDRF (skip this section if you are only approving a PDRF)

- 1) Complete the PDRF by navigating through each clickable link (pages) underneath “Transaction Home”
- 2) Enter the required information into the fields in each page either by clicking on the left hand side of the screen, or on the [blue hyperlinks](#) located at the bottom of each page

**Stanford Electronic Research Administration**

Search: SPO # [ ] ANABELV Sign out

Dashboard | Anabel Velasquez | Agreement type: Contract | Sponsor: National Institutes of Health

**TRANSACTION HOME**

PDRF #: PR568690  
Assigned to: Velasquez, Anabel  
Status: In Progress

**To Complete this PDRF:**

- Click here for a short Tutorial on preparing and approving PDRF
- Use the left-hand navigation, or the page-bottom links to move through the form
- Click Review for Completeness in the Actions menu to see what fields need to be completed
- When the form is complete, click Review & Approve this PDRF and then follow the instructions at the top of the page

Proposal Type: [New] Agreement Type: [Contract]

	Period 1	TOTAL
Start		
End		
IDC Rate		
Total direct \$	0	0
Animal care indirect \$	0	0
Total indirect \$	0	0
Total \$	0	0
Funds obligated to date \$	0	0
Status		

**PROPOSAL ROUTING**

Action Item	Status	Assigned	Completed	Comments	Reassign
PI - Anabel Velasquez					
Prepare PDRF	In Progress	Anabel Velasquez	04/11/2014 03:26 PM		Reassign

Next>>PI & Project Locations

- 3) You can also route for approvals to Other Stanford Faculty (OSF) prior to the PI approving their PDRF action item in the Other SU Faculty page **ONLY AFTER** the following information is entered in this proposal: **Principal Investigator, Sponsor, Project Title, & Administering Organization**
  - a. Click “Add Stanford faculty member”
  - b. Enter Role, SUNet ID in the name field, and any other information that you have available (you only need the role and SUNet ID to trigger a task.)

**ADD STANFORD FACULTY MEMBER**

Co-PI [ ] Philip A. Davies (pdavies - Administ) pdavies@stanford.edu (650) 736-7685

PI is an Academic Council member  
 PI is a Med Center Line faculty  
 Other (PI Waiver may be required)

In accordance with Stanford's policy on [Principal Investigatorship \(RPH 2.4\)](#), eligibility to act as a principal investigator (PI) or co-principal investigator (Co-PI) on externally-funded projects is a privilege limited to members of the Academic Council and to the MCL faculty. If an exception has not been granted, contact your School Dean's Office or Dean of Research Office immediately.

Appointment Type: Academic/Summer

%Effort [ ] %Effort [ ] Person [ ] Months [ ]

**PROJECT LOCATION**

## Department Administrator User Guide

- 4) After completing each page, click **“Review for Completeness”** to verify all sections and fields have been entered. If there are any errors, a screen will display with the section header and missing or incorrect information.

**Stanford Electronic Research Administration** Search: SPO # [ ] ANABELV Sign out

Dashboard **SPO #114818** Sponsor: National Institutes of Health

Anabel Velasquez School of Education Agreement type: Contract

**Project**

THE FOLLOWING SECTIONS AND FIELDS ARE LISTED ON THIS PDF

CLICK ON THE SECTION HEADERS TO NAVIGATE TO COMPLETE THE FIELDS.

CLICK "REVIEW FOR COMPLETENESS" TO RETURN TO THIS PAGE.

**PI & Project Location**

- % Effort Calendar or Academic/Summer
- All Effort Direct Charged to Project
- Building/Room OR Other Locations
- Is the above space assigned to PI or otherwise approved for the PI's use?
- Do you anticipate rental space, construction or renovations will be required to house this project or any equipment acquired for this project?
- Will any resources (funding, people, equipment, etc.) be used outside of the United States for this project?
- Will research be done at SLAC?
- Will SLAC resources be required to perform research (e.g. computers, computer processing, laboratories, equipment)?

**Administrative & Sponsor Details**

- Sponsor Deadlines
- Submission Method

**Budget Questions**

- Total Requested Budget/Contract Value
- Indirect cost Rate Applied
- Applies F&A Less than Negotiated Rates
- Are subawards included in this proposal?
- Modular budget
- Major Project
- Does this project include costsharing
- Will any SLAC personnel (paid by SLAC) be paid by this project?

**Project Questions**

- Animal Subjects (APLAC approval)
- Human Subjects (IRB approval)
- Cancer Center Research (SRC)
- Human Stem Cells (SCRO approval)
- Will the project involve access to disclosure-restricted technical information or software code or commercial items on the US Munitions List (ITAR)?
- Will Stanford personnel hand-carry or ship equipment, components, materials or software on media internationally?
- Cancer-related research
- Human blood or body fluids
- Infectious/Biohazardous agents
- Recombinant DNA molecules
- Radiological hazards

**Approvers & Comments**

- Institution Official
- Institutional Organization

**ACTIONS**

- Save
- View PDF
- Send to Another Preparer
- Route for Approvals
- Terminate Transaction
- Reassign
- Review for Completeness

Once all information has been correctly entered, a green **“COMPLETE”** message will be displayed.

**Test Record**

**SPO #106030** Sponsor: Coherent, Inc.

Anabel Velasquez Office of Sponsored Research Agreement type: Grant

**COMPLETE**

### STEP 3: ROUTE FOR APPROVALS

Click **“Route for Approvals”**. You will be returned to your Dashboard and the PDF will no longer be listed.

**Stanford Electronic Research Administration** Search: SPO # [ ] ANABELV Sign out

Dashboard **SPO #114818** Sponsor: National Institutes of Health

Anabel Velasquez School of Education Agreement type: Contract

**Project**

**TRANSACTION HOME**

Proposal - New

Title: Dept User Guides

Start Date: 12/2014

End Date: 12/2015

Total Requested Budget/Contract Value

Sponsor Deadlines

Submission Method

IDCR

Total direct	\$	0	\$	0
Animal care indirect	\$	0	\$	0
Total indirect	\$	0	\$	0
Total	\$	0	\$	0

**ACTIONS**

- Save
- View PDF
- Send to Another Preparer
- Route for Approvals
- Terminate Transaction
- Reassign
- Review for Completeness