Your Dashboard

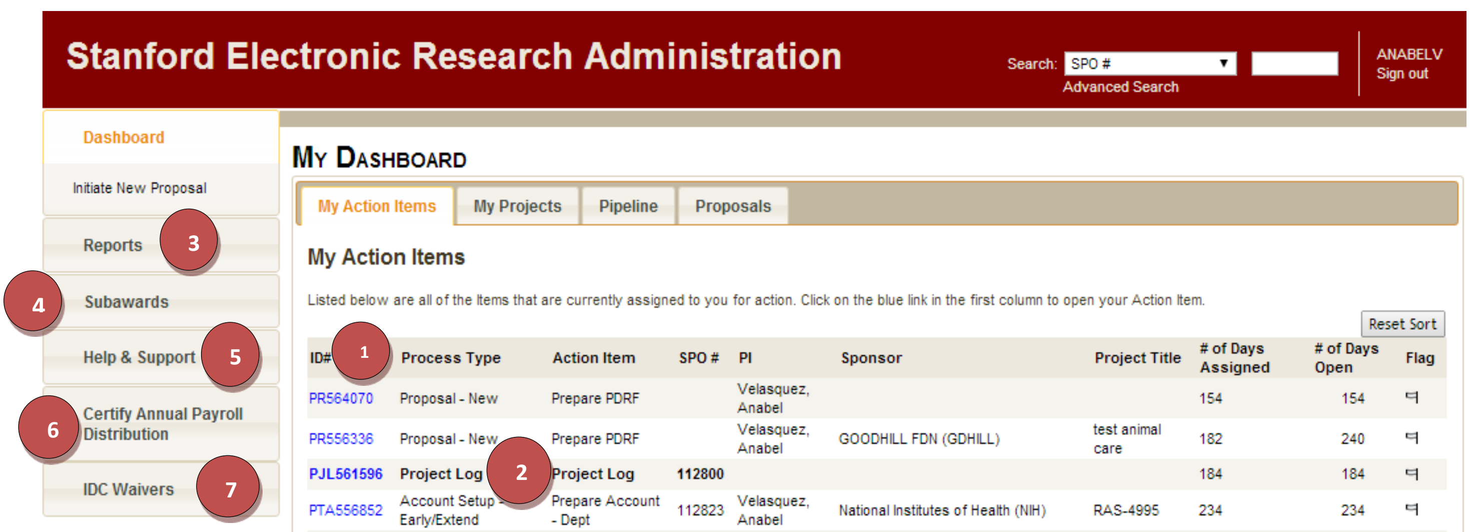
MY ACTION ITEMS Tab

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:

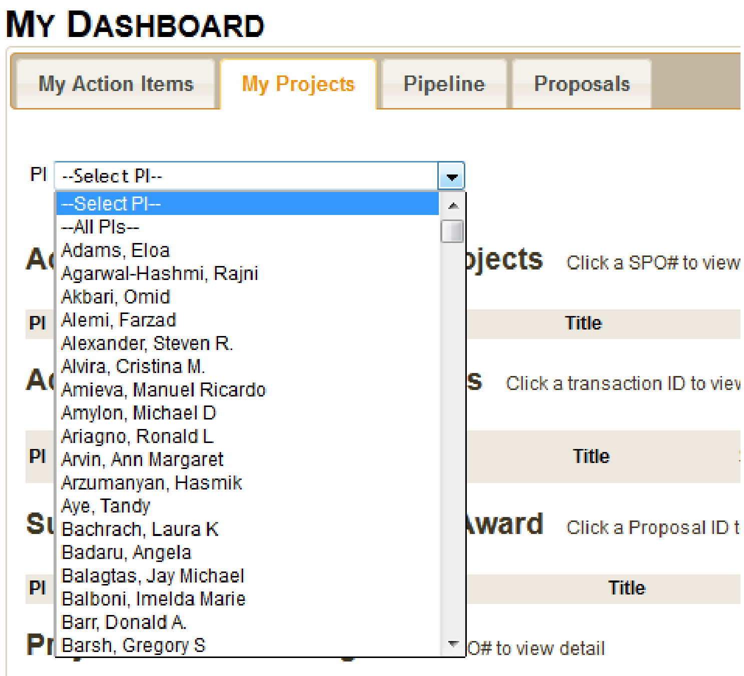
3. Clicking on Reports opens up a menu of various reports you can run, such as Other Support Reports for NIH, your department list of proposal submissions, etc.
4. If you are responsible for sub-recipient monitoring, you may process and monitor those sub-awards here.
5. Clicking on Help & Support directs 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*)



Department Administrator User Guide

MY PROJECTS Tab

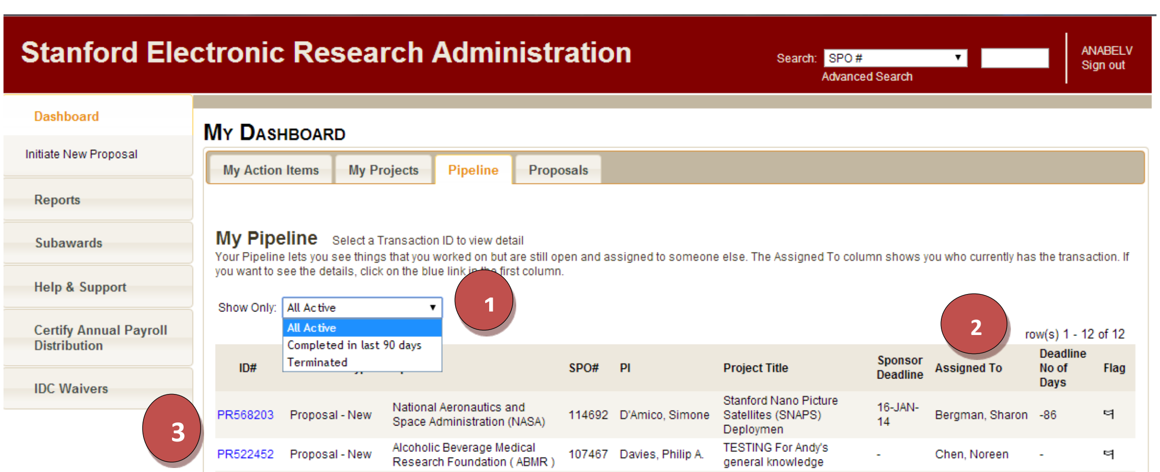
Administrators who have access to an organization in SeRA will also have access to the "**My Projects**" tab. The same categorical sections will be available for administrators, and they will be able to select a view for a particular PI, or for all PIs within their organization.



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#**".

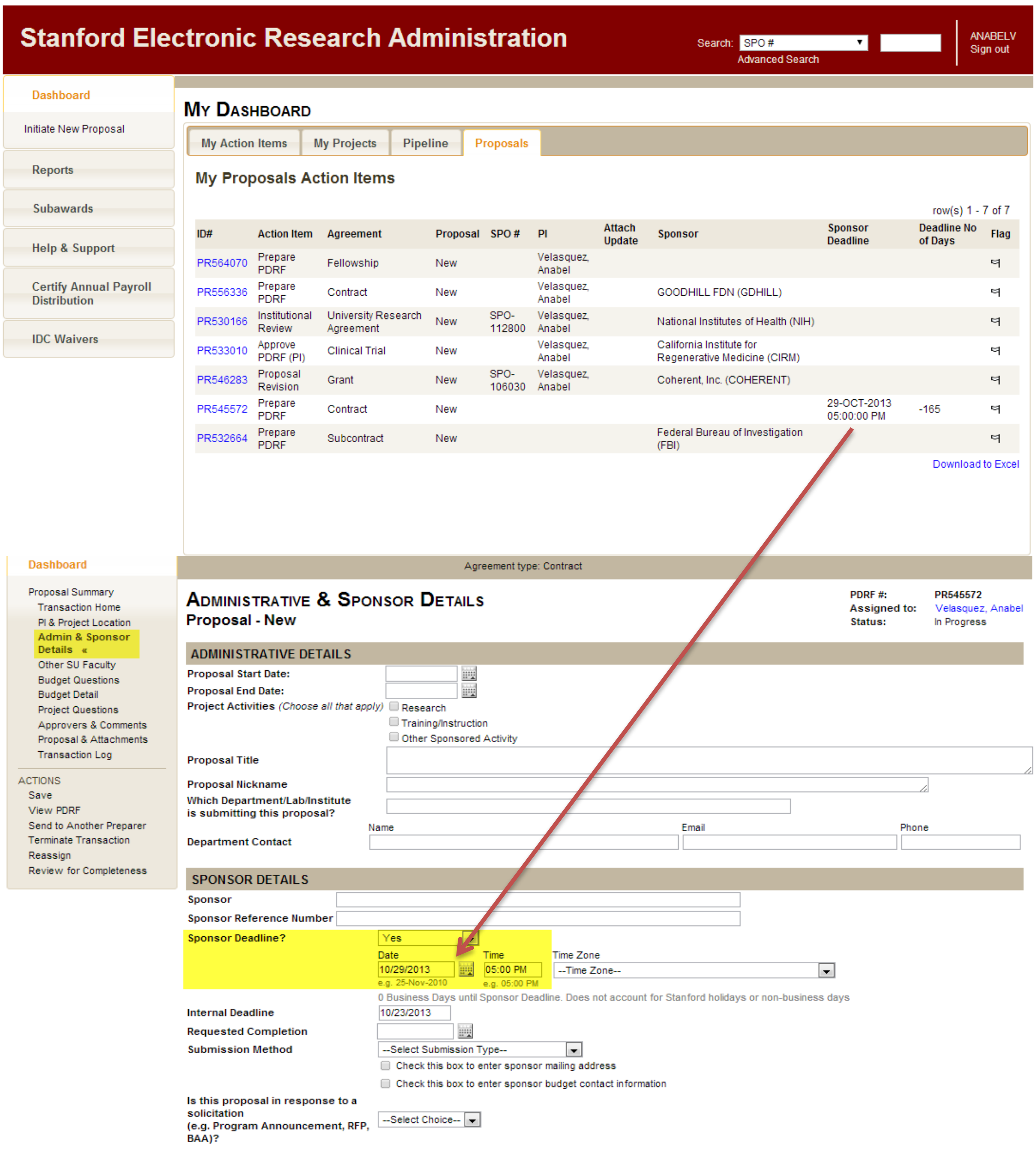


Department Administrator User Guide

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 # | Advanced Search | ANABELV | 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					
PR556336	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

Dashboard

Proposal Summary | Transaction Home | PI & Project Location | Admin & Sponsor Details « | Other SU Faculty | Budget Questions | Budget Detail | Project Questions | Approvers & Comments | Proposal & Attachments | Transaction Log

ACTIONS: Save | View PDRF | Send to Another Preparer | Terminate Transaction | Reassign | Review for Completeness

Agreement type: Contract

ADMINISTRATIVE & SPONSOR DETAILS

Proposal - New

PDRF #: PR545572
Assigned to: Velasquez, Anabel
Status: In Progress

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
Date 10/29/2013 (e.g. 25-Nov-2010) | Time 05:00 PM (e.g. 05:00 PM) | Time Zone --Time Zone--
0 Business Days until Sponsor Deadline. Does not account for Stanford holidays or non-business days
Internal Deadline 10/23/2013
Requested Completion
Submission Method --Select Submission Type--
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)? --Select Choice--

Next>>Other Stanford Faculty

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**"

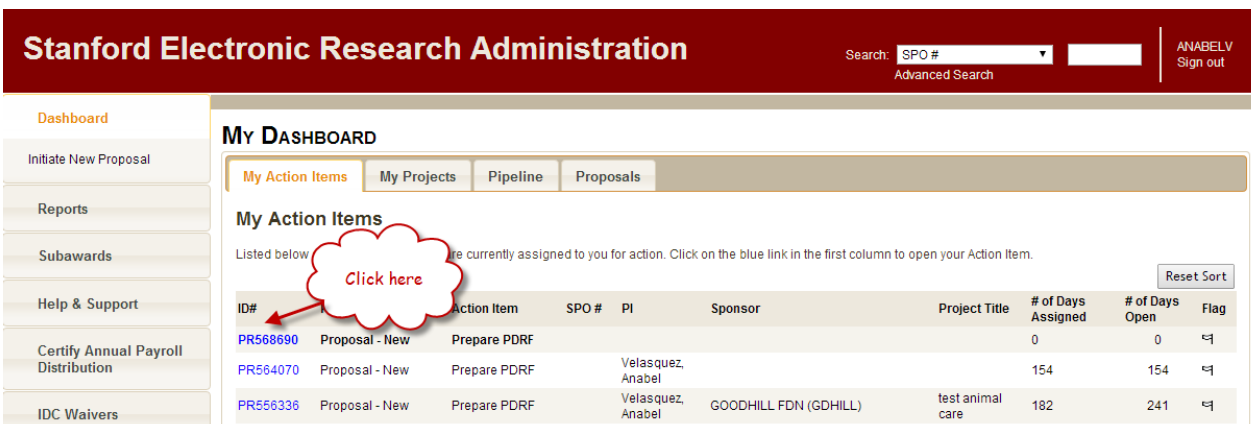
Proposal Assigned to You ("Prepare PDRF" task):

Click the link in the email notification sent to you

or

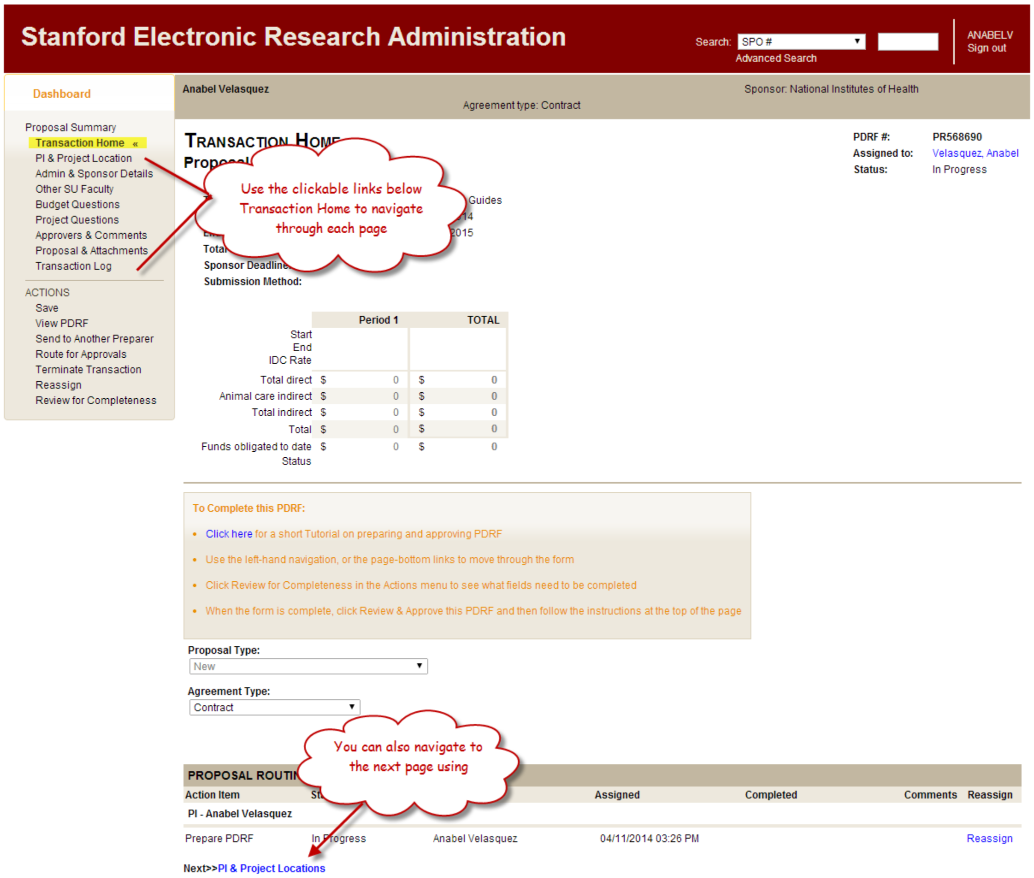
Log into the SeRA web portal at: https://sera.stanford.edu/

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

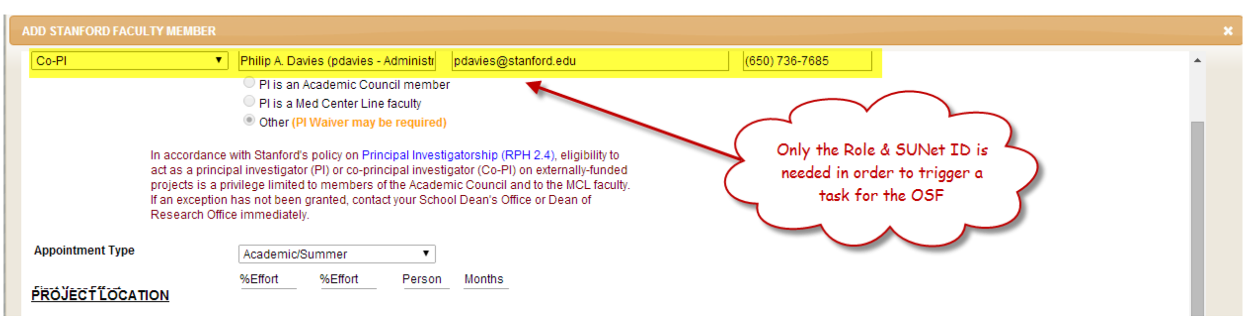


STEP 2: PREPARE THE PDRF (*skip this section if you are only approving a PDRF*)

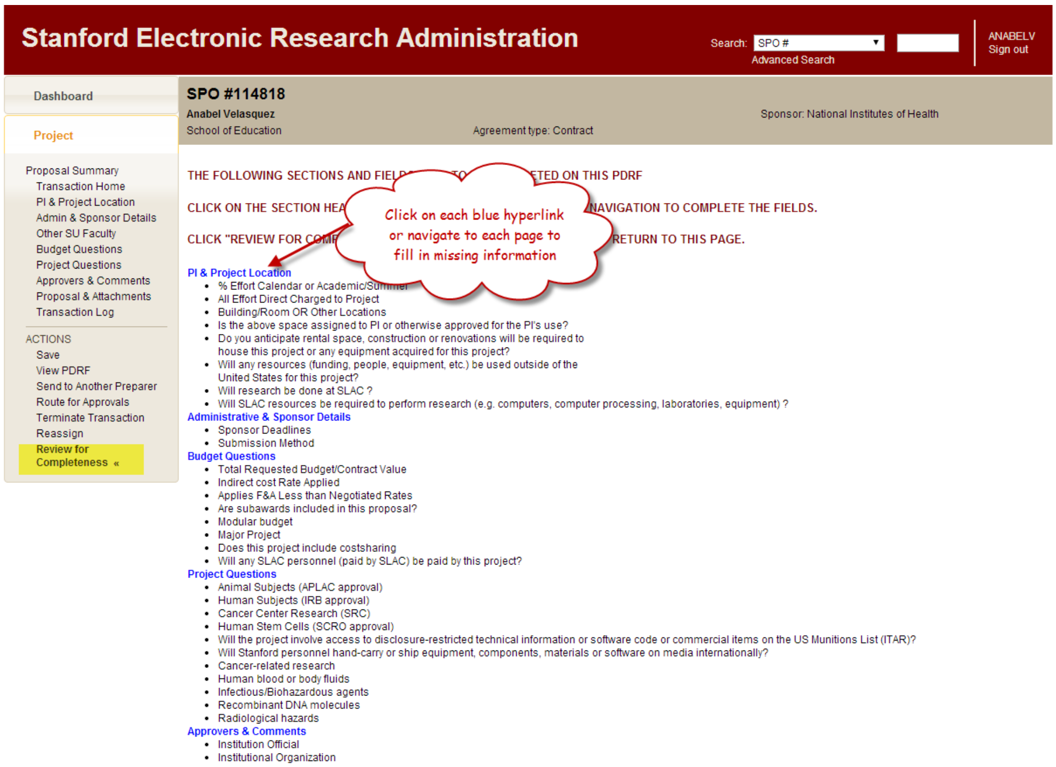
1) Complete the PDRF by navigating through each clickable link (pages) underneath "**Transaction Home**"
2) Enter the required information into the fields in each page either by clicking on the left hand side of the screen, or on the blue hyperlinks located at the bottom of each page



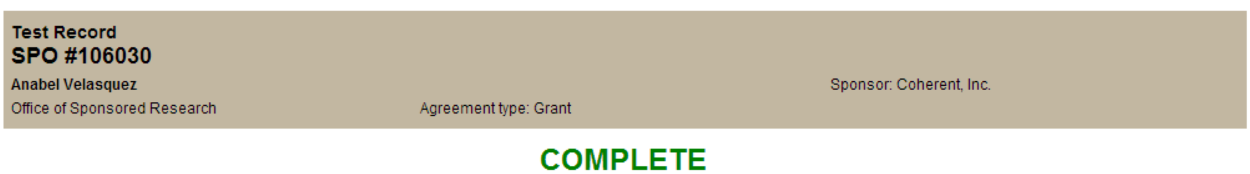
3) You can also route for approvals to Other Stanford Faculty (OSF) prior to the PI approving their PDRF action item in the Other SU Faculty page **ONLY AFTER** the following information is entered in this proposal: **Principal Investigator, Sponsor, Project Title, & Administering Organization**
   a. 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.)



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.



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



STEP 3: ROUTE FOR APPROVALS

Click "Route for Approvals". You will be returned to your Dashboard and the PDRF will no longer be listed.