

Creating Fellowship Proposal Development & Routing Forms (PDRFs) in SeRA – QUICK GUIDE

Overview

This quick guide describes how to create the following Fellowship PDRF types in SeRA:

- New Fellowship PDRF
- Non Competing Continuation Fellowship PDRF
- Resubmission Fellowship PDRF

Please note, this quick guide does not walk through the process of actually filling out the PDRF and should be used as a guide to navigate the SeRA system in order to launch your particular type of PDRF. Separate PDRF-specific quick guides will be available through the SeRA website.

SeRA supports the following web browsers:

- Firefox 3.x
- Internet Explorer 7.x
- Safari 3.x

Technical or application support may be requested through a HelpSU Ticket and general feedback may be provided to the SeRA team using the sera-support@lists.stanford.edu mailing list.

Temporary Updates to SeRA Homepage

In order to support PDRFs which were started in the original version of SeRA and significant upgrades over the original PDRF, we have had to make some temporary changes to the SeRA homepage. There are now two versions of the SeRA Dashboard – [My Dashboard Version 1](#) and [My Dashboard Version 2](#)

[My Dashboard Version 1](#): This is the page staff and faculty will use to manage Non-Fellowship PDRFs created in the original version of SeRA.

[My Dashboard Version 2](#): This is the page staff and faculty will use to create and manage new PDRFs (including Fellowships). This is also the page which will allow you to access Proposal and Award information now available in the new version of SeRA

Eventually, we will merge the two separate SeRA Dashboards into a single page. Below is an example of what the new SeRA Homepage will look like:



STANFORD ELECTRONIC RESEARCH ADMINISTRATION



ABOUT SeRA

SeRA supports various stages of the sponsored project lifecycle and is evolving into the institutional system of record for sponsored projects.

[MORE »](#)

HELP



- » [SeRA Help](#)
- » [Submit HelpSU Ticket](#)

NEWS & EVENTS



» **Compatible Browsers**

- » Internet Explorer 7.x (pc)
- » Firefox 3.x (pc)
- » Safari 3.x (mac)



PROPOSAL DEVELOPMENT & ROUTING

Formerly known as the SU-42, the Proposal Development & Routing process captures information electronically and facilitates the proposal approval workflow.

- [Create Proposal Development & Routing Form](#)
- [Go to My Dashboard, version 1](#)
- [Go to My Dashboard, version 2](#)



CONFLICT OF INTEREST

The Conflict of Interest process manages conflicts between an individual's private interests and professional obligations to the University.

- [Go to my Conflict Reports](#)

Creating a New Fellowship PDRF

A New Fellowship PDRF can be created directly from your SeRA Dashboard using the following steps:

1. Launch SeRA (<https://sera.stanford.edu>) and login to [My Dashboard Version 2](#)
2. Click [Initiate New Proposal](#) in the left column navigation

Stanford Electronic Research Administration Search: SPO # [] [] WJNELSON Sign out Build:25.11

Dashboard
Initiate New Proposal eProtocol
Other Agreements
Reports
Other Support - General
Other Support - NIH Project List

Step 2 ←

DASHBOARD

My Action Items Select a Transaction ID to work on it
Show Only: All Active (3)

Trans ID/ PDRF#	Action Item	Process Type	SPO #	PI	Sponsor	Assigned	Assigned No of Days
PR503349	Prepare PDRF	Process Proposal - Non Competing Continuation	47812	Nelson, William J	The Burhnam Institute	28-FEB-11	0
PR503061	Prepare PDRF	Process Proposal - New		Nelson, William J		23-FEB-11	5
PR502242	Prepare PDRF	Process Proposal - New		Nelson, William J	National Institutes of Health (NIH)	15-FEB-11	14

My Pipeline Select a Transaction ID to view detail
Show Only: All Active (4)

Trans ID/ PDRF#	Process Type	SPO #	Sponsor	PI	Current Step	Date Started	Current Assignee
PR502242	Process Proposal - New		National Institutes of Health (NIH)	Nelson, William J	Prepare PDRF	14-FEB-11	Nelson, William J
PR502401	Process Proposal - New	SPO-101640	National Institutes of Health (NIH)	Nelson, William J	Approve PDRF (PI)	14-FEB-11	Nelson, William J
PR503061	Process Proposal - New			Nelson, William J	Prepare PDRF	23-FEB-11	Nelson, William J
PR503349	Process Proposal - Non Competing Continuation	47812	The Burhnam Institute	Nelson, William J	Prepare PDRF	28-FEB-11	Nelson, William J

3. SeRA will automatically take you to the Proposal Summary: Process Proposal - New page
 - a. Select [Fellowship](#) from the Agreement Type drop down list
 - b. Proceed with filling out the New Fellowship PDRF by clicking [PI & Project Location](#) at the bottom of the form

Dashboard

Proposal Summary
Transaction Home «

ACTIONS

- Save
- View PDRF
- Send to Another Preparer
- Terminate Transaction
- Reassign
- Check for Errors

PROPOSAL SUMMARY Process Proposal - New

PDRF #: PR503422
Assigned to: Nelson, William J
Status:

Title:
Start Date:
End Date:
Total Requested Budget: \$ 0
Sponsor Deadline:
Submission Method:

	Period 1	TOTAL
Start		
End		
IDC Rate		
Total direct	\$ 0	\$ 0
Animal care indirect	\$ 0	\$ 0
Total indirect	\$ 0	\$ 0
Total	\$ 0	\$ 0

Proposal Type:

New

Agreement Type:

- Select one--
- Select one--
- Clinical Trial
- Contract
- Cooperative Agreement
- Fellowship
- Grant
- Other
- Personnel
- Subcontract
- University Research

Step 3a



STATUS

Status	Assignee	Assigned	Completed
In Progress	Nelson, William J	01-Mar-2011 11:08AM	Reassign

Step 3b



Next >> [PI & Project Locations](#)

Creating a Non Competing Continuation Fellowship PDRF

A Non Competing Continuation (NCC) Fellowship PDRF is related to an existing Award Transaction and can be created from the Award Summary: Segment page using the following steps:

1. Launch SeRA (<https://sera.stanford.edu>) and login to [My Dashboard Version 2](#)
2. Find the existing Research Project by searching for the SPO# in the Quick Search box or performing an Advanced Search (upper right hand corner of screen)

Stanford Electronic Research Administration Step 2

Search: SPO # WJNELSON Sign out Build:25.11

Dashboard **SPO #102081**

Project William J Nelson Agreement Number: 12345 Sponsor: National Institutes of Health
Biology Department Agreement type: Grant

3. SeRA will display the Project Summary page
 - a. Click the Award Segment number to drill down to the Award Summary: Segment page

Stanford Electronic Research Administration Search: SPO # WJNELSON Sign out Build:33.3

Dashboard **SPO #105022**

Project William J Nelson Agreement Number: 12345 Sponsor: National Science Foundation
Biology Department Agreement type: Fellowship

Attachments
Project History

Other Agreements

Summary Proposals Awards Other Transactions

PROJECT SUMMARY

Title: Psychosomatic effects of Stanford University's dominance within Pac-12 Conference Athletics
Keyword:
Start Date: 01-Jun-2011 Total Project Estimated Cost: \$10,000.00
Funded To Date: 31-Jul-2011 Total Project Funded To Date: \$10,000.00

1 - 1

Award Segment	Segment Type	Start	End	Budget Amount	Funded to Date	Funding Status
1	Standard	01-Jun-2011	31-Jul-2011	\$ 10,000.00	\$ 10,000.00	Fully Funded

SUBMITTED PROPOSALS PENDING AWARD

Step 3a

4. SeRA will display the Award Summary: Segment page
 - a. Select [Process Proposal – Non Competing Continuation](#) from the drop down list near the middle of the form
 - b. Click the [Yes](#) button on the confirmation pop-up box

Dashboard	SPO #105041	Agreement Number: 12345	Sponsor: National Science Foundation
Project	William J Nelson Biology Department	Agreement type: Fellowship	
Segment Summary <			

AWARD SUMMARY

Segment 1

Title: Psychosomatic effects of Stanford University's dominance within Pac-12 Conference Athletics

Start Date: 01-Jun-2011 Total Estimated Cost: \$ 10,000
 Funded To Date: 30-Jun-2011 Total Funded To Date: \$ 5,000

	Period 1	Period 2	TOTAL
Start	01-Jun-2011	01-Jul-2011	01-Jun-2011
End	30-Jun-2011	31-Jul-2011	31-Jul-2011
IDC Rate	0%	0%	
Total direct	\$ 0	\$ 0	\$ 0
Animal care indirect	\$ 0	\$ 0	\$ 0
Total indirect	\$ 0	\$ 0	\$ 0
Total	\$ 5,000	\$ 5,000	\$ 10,000
Funds obligated to date	\$ 5,000	\$ 0	\$ 5,000
Status	Fully Funded	Anticipated	

✕

Are you sure you want to create a NCC proposal ?

Step 4b
Yes
No

Step 4a

Start a Transaction

FUNDING HISTORY

Award Type	Funded To	Amount	Date Issued
Process Award - New	30-Jun-2011	\$ 5,000	18-May-2011
		\$ 5,000	Total funded

5. SeRA will display the Transaction Home page
 - a. Check the box under the Period of Performance which applies to this NCC Fellowship PDRF
 - b. Proceed with filling out the NCC Fellowship PDRF by clicking [Fellow & Project Location](#) at the bottom of the form

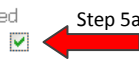
TRANSACTION HOME

Process Proposal - Non Competing Continuation

PDRF #: PR508762
 Assigned to: Nelson, William J
 Status:

Title: Psychosomatic effects of Stanford University's dominance within Pac-12 Conference Athletics
Start Date:
End Date:
Total Requested Budget: \$ 0
Sponsor Deadline:
Submission Method:

	Period 1	Period 2	TOTAL
Start	01-Jun-2011	01-Jul-2011	01-Jun-2011
End	30-Jun-2011	31-Jul-2011	31-Jul-2011
IDC Rate	0%	0%	
Total direct	\$ 0	\$ 0	\$ 0
Animal care indirect	\$ 0	\$ 0	\$ 0
Total indirect	\$ 0	\$ 0	\$ 0
Total	\$ 5,000	\$ 5,000	\$ 10,000
Funds obligated to date	\$ 5,000	\$ 0	\$ 5,000
Status	Fully Funded	Anticipated	



INSTRUCTIONS:

- (1) Select the applicable non-competing continuation period above
- (2) Click "Next »Fellow& Project Location" below to continue

To Complete this PDRF:

- Use the left-hand navigation, or the page-bottom links to move through the form
- Click Check for Errors 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:

Non-competing Continuation

Agreement Type:

Fellowship

PROPOSAL ROUTING STATUS

Action Item	Status	Assignee	Assigned	Completed	Reassign
PI - William J Nelson					
Prepare PDRF	In Progress	William J Nelson	05/18/2011 06:42 PM		Reassign

Next>>[Fellow & Project Locations](#) 

Creating a Resubmission Fellowship PDRF

A Resubmission Fellowship PDRF is related to an existing Proposal Transaction and can be created from the Proposal Summary page using the following steps:

1. Launch SeRA (<https://sera.stanford.edu>) and login to [My Dashboard Version 2](#)
2. Find the existing Research Project by searching for the SPO# in the Quick Search box or performing an Advanced Search (upper right hand corner of screen)

The screenshot shows the SeRA dashboard header with the text "Stanford Electronic Research Administration" and a "Step 2" indicator with a red arrow pointing to the search area. The search area contains a dropdown menu for "SPO #" and a search button labeled "Advanced Search". The user's name "WJNELSON" and version "Build:25.11" are displayed in the top right. Below the header, a navigation menu includes "Dashboard" and "Project". The main content area displays project information for SPO #102081, including the name "William J Nelson", department "Biology Department", agreement number "12345", agreement type "Grant", and sponsor "National Institutes of Health".

3. SeRA will display the Project Summary page
 - a. Click the Proposal ID to drill down to the Proposal Summary page

The screenshot shows the SeRA Project Summary page for SPO #105022. The header includes "Stanford Electronic Research Administration" and a search area with "SPO #" and "Advanced Search" buttons. The user's name "WJNELSON" and version "Build:33.3" are in the top right. The navigation menu includes "Dashboard", "Project", "Attachments", "Project History", and "Other Agreements". The main content area displays project details for SPO #105022, including the name "William J Nelson", department "Biology Department", agreement number "12345", agreement type "Fellowship", and sponsor "National Science Foundation". Below the project details, there are tabs for "Summary", "Proposals", "Awards", and "Other Transactions". The "Summary" tab is active, showing the "PROJECT SUMMARY" section with fields for Title, Keyword, Start Date, Total Project Estimated Cost, and Funded To Date. Below this, there is a section for "SUBMITTED PROPOSALS PENDING AWARD" with a table of proposals. A red arrow labeled "Step 3a" points to the "P1" proposal ID in the table.

Proposal ID	Deadline Date	Proposal Type	Start Date	End Date	Amount Requested	Status
P1	31 May, 2011 05:00 PM	New	01-Jun-2011	31-Jul-2011	\$ 10,000.00	Proposed / Submitted

4. SeRA will display the Proposal Summary page
 - a. Select [Process Proposal – Resubmission](#) from the drop down list near the middle of the form
 - b. Click the [Yes](#) button on the confirmation pop-up box

* Please Note – SeRA will automatically “Reject” the original PDRF and create the Resubmission Fellowship PDRF

Dashboard

Project

Proposal Summary «
PDF

SPO #105022

William J Nelson
Biology Department

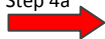
Agreement Number: 12345
Agreement type: Fellowship

Sponsor: National Science Foundation

PROPOSAL SUMMARY P1

Proposal Type: New
Title: Psychosomatic effects of Stanford University's dominance within Pac-12 Conference Athletics
Start Date: 01-Jun-2011
End Date: 31-Jul-2011
Total Requested Budget: \$ 10,000
Sponsor Deadline: 31 May, 2011 05:00 PM
Submission Method: Grants.gov
Proposal Status: Proposed / Submitted

Step 4a



Start a Transaction

--Select Transaction--

PROPOSAL HISTORY

Transaction Type	Transaction Started	Transaction Completed	Transaction ID	Assigned To
Process Proposal - New	18-May-2011	18-May-2011	PR508754	Pane, Michiko Taniguchi

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5. SeRA will display the Transaction Home page
 - a. Proceed with filling out the Resubmission Fellowship PDF by clicking [Fellow & Project Location](#) at the bottom of the form

TRANSACTION HOME

Process Proposal - Resubmission

PDRF #: PR522532
 Assigned to: [Davies, Philip A.](#)
 Status: Prepare Form

Title: Psychosomatic effects of Stanford University's dominance within Pac-12 Conference Athletics
 Start Date:
 End Date:
 Total Requested Budget: \$ 0
 Sponsor Deadline:
 Submission Method:

	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 Type:

New

Agreement Type:

Fellowship

PROPOSAL ROUTING STATUS

Action Item	Status	Assignee	Assigned	Completed	Reassign
PI - Philip A. Davies					
Prepare PDRF	In Progress	Philip A. Davies	05/19/2011 12:14 PM		Reassign

Next >> [Fellow & Project Locations](#)  Step 5a