Stanford University

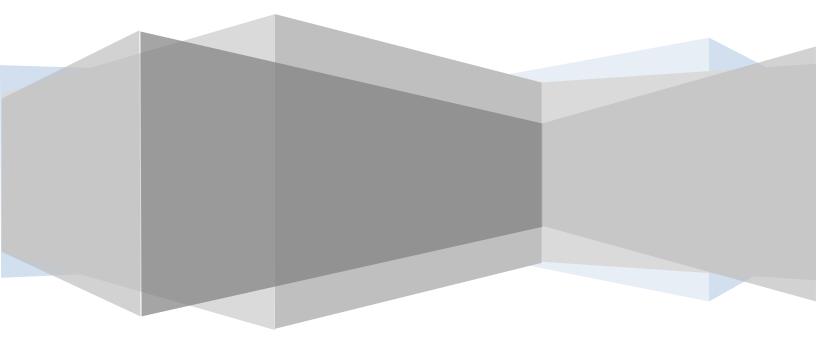


Attachments

User Guide

All Users

Version 2.0



era Stanford Electronic Research Administration

USER GUIDE

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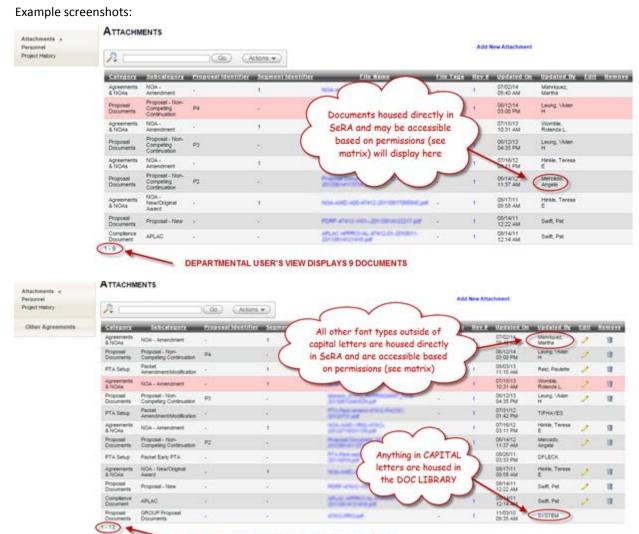
BACKGROUND

Prior to the implementation of "SeRA", there was the "SPIDERS" system (which is where the converted SeRA data comes from) and DocLibrary (which held attachments from the SPIDERS system). In order to access "DocLibrary", one had to have approval; however, this access is no longer provided.

Attached are examples and a matrix list of views by document **Categories** and **Subcategories** with a comparison of what Departmental Users vs. Central Office Users can/ cannot see in SeRA.

If departmental users see a document in **CAPITAL LETTERS**, but are unable to read an attachment and see "garbled language", it is usually due to that document being housed in the **Doc Library**. *ONLY Central Office users* will have access to the Doc Library. Users are referred over to their Institutional Official if requesting access to the attachment.

*Disclaimer: The SeRA Team does not make the assumption that because the user has access to that department that also means that they should have that access to that document. We leave that decision up to the IO's discretion.



CENTRAL OFFICE USER'S VIEW DISPLAYS 13 DOCUMENTS

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ACCESS/ PERMISSIONS OVERVIEW

In order to view attachments or documents within a "**SPO**" (project), users must have the appropriate access/ permission to that SPO's administering org code. These permissions are usually granted through the department/ division's Division Manager, Admin Services Manager, Director of Finance and Administration (**DFA**) the Assistant DFA, or upper level management.

Access is also based on the "**Category**" and "**Subcategory**" selected when the documents are uploaded. These factors determine whether or not a user will have access to the document. Attachments can be made at the transaction level or the project level. Some categories and sub-categories are restricted to just central office users. Some categories and sub-categories are restricted to certain transaction types.

*Please refer to the matrix on page 14 to determine what is viewable at the Departmental versus the Central Office views. Screenshots displayed have varying examples based on Category and Subcategory chosen.

ACCESS OR VIEW ATTACHMENTS AT THE PROJECT LEVEL

- 1. Log into the SeRA web portal at: <u>https://sera.stanford.edu/</u>
 - a. SeRA will ask you to WebAuth (if that hasn't been done previously).
- 2. Once logged into SeRA and you are in your Dashboard, search for the desired SPO or project.
- 3. Under the "Project Summary", and in the "Left-Hand Navigation" (LHN), click on "Attachments".

Stanford Elec	tronic l	Resear	ch Ad	lministi	ration
<u>Click here</u>	Test Record SPO #11282 Anabel Velasquez Pathology	-			ent Number: 112312 Int type: Clinical Trial
Attachments Personnel Summary	Summary	Proposals	Awards	Subawards	Other Transacti
Project Comments Project History	PROJECT	SUMMARY	>		
Other Agreements	Title: RAS-4995 Keyword: Start Date: Funded To Dat	07/08/2013			otal Project Estimate otal Project Funded
	SUBMITTED F	ROPOSALS P	ending Awa	RD	
	Proposal ID	Deadline Dat	te	Proposal Type	Start Date
	P1			New	07/08/2013

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4. Clicking on the blue hyperlink under the column "Filename" will open a new window, which will then allow you to download the attachment.

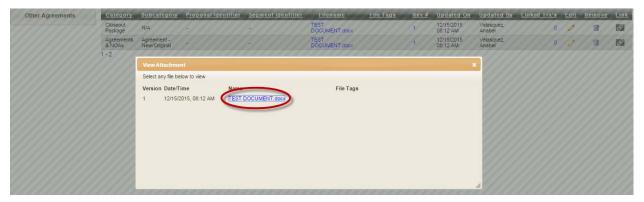
*Note: Department views show only 1 attachment





*Note: Central Office views show 2 attachments

						Advance	ed Search		Sign out				
Dashboard Test Record SPO #112823													
Project	Anabel Velasquez Pathology			Agreement Number: 11231 Agreement type: Clinical Trial	Sponsor: National Institutes of Health Prime Sponsor: American Heart Association								
Attachments « Personnel Summary	ATTACHN	IENTS						Add 3	lew Attachment				
Project Comments Project History	2		Go	Actions 💌				Aut	iew Attacimient				
Other Agreements	Category	<u>Subcategory</u>	Proposal Identifie	<u>Segment Identifier</u>	<u>Filename</u>	File Tags	<u>Rev #</u>	<u>Updated On</u>	Updated By	Linked Trx's	Edit	Remove	1
	Closeout Package	N/A	-		TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	0	1	1	4
	Agreements & NOAs	Agreement - New/Original			TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	0	1	1	ł



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ATTACHMENTS

ATTACH DOCUMENTS AT THE PROJECT LEVEL

- **1.** Search for the desired SPO or project.
- 2. Under the "Project Summary", and in the "Left-Hand Navigation" (LHN), click on "Attachments".

Stanford Elec	ctronic I	Resear	ch Ad	ministr	ation			
Dashboard Project	Test Record SPO #11282 Anabel Velasquez Pathology	3		· · · · ·	nt Number: 112312 ht type: Clinical Trial			
Attachments Personnel Summary	Summary	Proposals	Awards	Subawards	Other Transacti			
Project Comments Project History	PROJECT	SUMMARY	>					
Other Agreements	Keyword: Start Date: Funded To Dat	07/08/2013 e:			otal Project Estimate otal Project Funded			
	SUBMITTED PROPOSALS PENDING AWARD							
	Proposal ID	Deadline Dat	e	Proposal Type	Start Date			
	P1			New	07/08/2013			

3. Click on "Add New Attachment".

Stanford Ele	ctronic Researcl	n Administration	Search: SPO# ANABELV Advanced Search Sign out
Dashboard	Test Record SPO #112823		
Project	Anabel Velasquez Pathology	Agreement Number: 112312 Agreement type: Clinical Trial	Sponsor: National Institutes of Health Prime Sponsor: American Heart Association
Attachments « Personnel Summary Project Comments Project History		Go Actions V	Add New Attachment

- 4. Select a "Category", "Sub Category", and select the file you would like to upload by clicking "Choose File". Enter in any file tag(s) if desired.
- 5. Click "Attach".
 - a. Based on your level of access, the Categories available to you may differ than that of another user.

Add Attachment	×
Add Attachment * Category Proposal Documents * Sub Category Proposal - New * * File Location Choose File image001.png File Tag(s)	×
Atta	ach Cancel

USER GUIDE

ATTACHMENTS

LINK ATTACHMENTS TO TRANSACTIONS (Project Level)

- 1. Search for the desired SPO or project.
- 2. Under the "Project Summary", and in the "Left-Hand Navigation" (LHN), click on "Attachments".

Stanford Ele	ctronic	Resear	ch Ad	ministr	ration
Dashboard Project	Test Record SPO #11282 Anabel Velasque Pathology				e nt Number: 112312 nt type: Clinical Trial
Attachments Personnel Summary Project Comments	Summary	Proposals	Awards	Subawards	Other Transacti
Project History Other Agreements	PROJECT Title: RAS-499 Keyword: Start Date:	5 07/08/2013	>	т	otal Project Estimat∉
	Funded To Da				otal Project Funded

3. Click on the icon under the "Link" column for the attachment you'd like to link.

Dashboard Project	Test Record SPO #1128 Anabel Velasqu Pathology	823		Agreement Number: 11231 Agreement type: Clinical Tria				tutes of Health an Heart Associatio	on				
Attachments « Personnel Summary Project Comments Project History		IENTS	Go (7	Actions				Add M	New Attachment	_			
Other Agreements	Category	Subcategory	Proposal Identifier	<u>Segment Identifier</u>	<u>Filename</u>	File Tags	<u>Rev #</u>	Updated On	Updated By	Linked Trx's	<u>Edit</u>	Remove	Link
	Closeout Package	N/A	-	-	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	0	1	1	
	Agreements & NOAs	Agreement - New/Original	-	-	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	0	1	1	8
	1 - 2												

- 4. Select the checkbox (es) for the transactions you'd like to link the attachment to.
 - a. *Note that you can link documents that are IN PROGRESS (those with hyphens in the "Transaction Completed" column) or COMPLETED (those with date stamps) transactions.
- 5. Click "Link".

PJL599514 Project Log - AW598646 Award - New - PR556554 Proposal, New 16.41/0-13	Select	Transaction Identifier	Transaction Type Name	Transaction Con	npleted
		PJL599514	Project Log	-	
PR556554 Proposal New 16-AUG-13		AW598646	Award - New	-	
	•	PR556554	Proposal - New	16-AUG-13	

6. In the "Linked Trx's" column, the hyperlink will display how many transactions have been linked to that attachment.

ATTACHN	IENTS											
₽		Go (A	actions 💌				Add I	New Attachment				
Category	Subcategory	<u>Proposal Identifier</u>	<u>Segment Identifier</u>	<u>Filename</u>	<u>File Tags</u>	<u>Rev #</u>	<u>Updated On</u>	Updated By	Linked Trx's	<u>Edit</u>	<u>Remove</u>	Link
Closeout Package	N/A	P1	1	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	2	10	1	8
Agreements & NOAs	Agreement - New/Original	-	-	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	0	1	1	8
1 - 2												

7. Click on the hyperlink to verify which transactions have been linked to that attachment.

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Linked Transact	ions			×
Transaction #	Transaction Type	Complete Date	Full Status Name	^
PR556554	Proposal - New	16-AUG-13	Completed	
AW598646	Award - New	-	In Progress	
			1 - 2	

a. If you have linked an attachment to a completed transaction, this information will show up in the completed transaction's "**Proposal & Attachments**" page with the timestamp in **BOLD**.

Dashboard	Test Record SPO #112823							
Project	Anabel Velasquez Pathology		Agreement Agreement ty			Sponsor: National Ine Prime Sponsor: Ame	stitutes of Health rican Heart Associatio	ı
Proposal Summary Transaction Home PI & Project Location Admin & Sponsor Details Project Personnel Budget Questions Budget Detail Project Questions Approvers & Comments Proposal & Attachments « Transaction Log	that will facilitate Important Note: • A final version	III proposal, deta the review and of your proposal ML	ailed budget and justifica submission process JST be attached for Institutional our proposal during the PDRF F	Review & Sut	mission by OSR or I	RMG	PDRF #: Assigned Status:	PR556554 to: None Completed 06/16/2013
Cover Letter	List Attachments	s						
ACTIONS	Category	Subcategory	File Name	Rev #	File Tag(s)	Undated On	Updated By	Actions
View PDRF	Closeout Package	N/A	TEST DOCUMENT.docx	1		15-DEC-2015 08:12	Velasquez, Anabel	👕 🥒 row(s) 1 - 1 of 1

ADD ATTACHMENTS TO OPEN TRANSACTION (Transaction Level)

*If the transaction is currently assigned to **you**, search for the desired transaction in your "**Dashboard**".

*If the transaction is currently assigned to **someone else**, search for the desired transaction via a simple search.

1. From the "Transaction Home" and on the LHN, click on "Attachments".

Dashboard Project	SP(Anab	Test Record SPO #112823 (Segment 1) Anabel Velasquez Pathology TRANSACTION HOME					ment Number: 1123 nent type: Clinical Tri			Sponsor: National Institutes of Health Prime Sponsor: American Heart Association			
Segment Summary Transaction Hom Project Personnel Budget Questions Budget Detail Funding Detail	ie « Awa s E	ANSACTIC ard - New start Date: sind Date: sunded To:	05/02	2/2015 1/2016 1/2016			al Award Budget: al Funded To Date	s : s	1,941,440 1,941,440		Transacti Assigned Status:		AW598646 Velasquez, Anabel In Progress
Project Questions Terms and Condition Review & Approve Attachments View Project Attach	nments	Tot	Start End OC Rate al direct	Period 1 05/02/2015 05/01/2016 28% \$ 1,516,750	s	TOTAI 05/02/2015 05/01/2016 1,516,750	5						
Click on "Add ATTACHMEN Award - New		achmen	t".								Transaction ID: Assigned to: Status:	Vela In P	598646 asquez, Anabel irogress
List Attachments						Dave #	F'1- T(-)				Link to	Existi	
Category V Closeout Package	Subcatego N/A		Name T DOCU	JMENT.docx		Rev # 1	File Tag(s)		Update 15-DEC	d On -2015 08:12	Updated By Velasquez, Anabe		Actions

2.

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ATTACHMENTS

- 6. Select a "Category", "Sub Category", and select the file you would like to upload by clicking "Choose File". Enter in any file tag(s) if desired.
- 7. Click "Attach".
 - **a.** Based on your level of access, the Categories available to you may differ than that of another user.

Add Attachment		×
* Category		
Agreements & NOAs V		
* Sub Category		
NOA - New/Original Award 🔻		
* File Location		
Choose File TEST DOCUMENT.docx		
File Tag(s)		
	A	
	Attach Cancel	
		11

LINK ATTACHMENTS TO OPEN TRANSACTION (Transaction Level)

*If the transaction is currently assigned to you, search for the desired transaction in your "Dashboard".

- *If the transaction is currently assigned to someone else, search for the desired transaction via a simple search.
- 1. From the "Transaction Home" and on the LHN, click on "Attachments".

Dashboard Project	Test Record SPO #11282 Anabel Velasquez Pathology		nt 1)		ent Number: 112312 ent type: Clinical Trial			tional Institutes of Health	
Segment Summary Transaction Home « Project Personnel Budget Questions Budget Detail Funding Detail Project Questions	TRANSACTI Award - New Start Date: End Date: Funded To:		5		I Award Budget: S I Funded To Date: S	1,941,440 1,941,440		Transaction II Assigned to: Status:	D: AW598646 Velasquez, Anabel In Progress
Terms and Conditions Review & Approve Attachments View Project Attachments Click "Link to Existi	Тс	Start End DC Rate otal direct \$	05/02/2015 05/01/2016 28% 1,516,750	05/02/2015 05/01/2016 1,516,750					
ATTACHMENTS Award - New								Transaction ID: Assigned to: Status:	AW598646 Velasquez, Anabel In Progress
							Add New Atta	chment Link to E	Existing Document
List Attachments Category Su	bcategory F	ile Name		Rev #	File Tag(s)	Updated On		Updated By	Actions
Closeout Package N/	,	EST DOCUM	MENT.docx	1	rne tag(s)	15-DEC-201		Velasquez, Anabel	row(s) 1 - 1 of 1

Next>>Transaction Log

2.

3. Select which attachments you'd like to link the transaction to and click "Add Attachments".

<u>Select</u>	<u>Category</u>	<u>Full Class Type</u>	<u>File Name</u>	Revision	<u>Revision Date</u> 👻	<u>Updated By</u>	<u>File Tags</u>
	Agreements & NOAs	Agreement - New/Original	TEST DOCUMENT.docx	1	12/15/2015 08:12AM	∨elasquez, Anabel	
Add Attachn	nents						1 - 1 of

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ATTACHMENTS

i. The linked attachment will now show up on the list of attachments in that transaction.

List Attachments Category	Subcategory	File Name	Rev #	File Tag(s)	Updated On	Updated By	Actions
Agreements & NOAs	Agreement - New/Original	TEST DOCUMENT.docx	1		15-DEC-2015 08:12	Velasquez, Anabel	1 /
Closeout Package	N/A	TEST DOCUMENT.docx	1		15-DEC-2015 08:12	∨elasquez, Anabel row	🗊 🥒 (s) 1 - 2 of 2
Next>>Transaction Lo	9						

REMOVE/ DELETE ATTACHMENTS (Project Level)

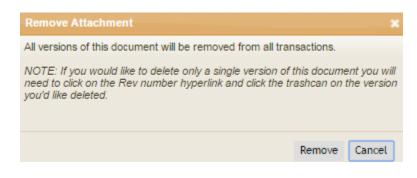
- **1.** Search for the desired SPO or project.
- 2. Under the "Project Summary", and in the "Left-Hand Navigation" (LHN), click on "Attachments".

Stanford Ele	ectronic Research A	dministration
Dashboard Click here	Test Record SPO #112823 nabel Velasquez Pathology	Agreement Number: 112312 Agreement type: Clinical Trial
Attachments Personnel Summary Project Comments Project History	Summary Proposals Awards	Subawards Other Transacti
Other Agreements	Title: RAS-4995 Keyword: Start Date: 07/08/2013 Funded To Date:	Total Project Estimate Total Project Funded

- **3.** Locate the attachment you would like to delete/ remove.
 - a. If there is only 1 version of an attachment OR If there is more than 1 version of an attachment AND you want to remove all of the attachments:
 - i. Click on the garbage can under the "Remove" column.

								National Institutes of Health onsor: American Heart Association					
Personnel Summary Project Comments		INTS	Go A	ctions 🔻				Add N	ew Attachment				
Other Agreements	Category	Subcategory	<u>Proposal Identifier</u>	<u>Segment Identifier</u>	<u>Filename</u>	<u>File Tags</u>	<u>Rev #</u>	Updated On	Updated By	Linked Trx's	<u>Edit</u>	Remove	Link
	Closeout Package	N/A	P1	1	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	2	1	1	8
Agi & N 1 - 2	NOAs	Agreement - New/Original	•	1	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	1	1		8

- 1. A warning message will display advising that all versions of this document will be removed.
- 2. Click "Remove" or "Cancel".



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ATTACHMENTS

- **b.** If there is **more than 1** version of an attachment **AND** you want to remove **only one** version:
 - i. Click on the blue numerical hyperlink under the "**Rev #**" column.

Аттасни	IENTS						Add	New Attachment				
Category	Subcategory		Segment Identifier	Filename	File Tags	Rev #	Updated On	Updated By	Linked Trx's	Edit	Remove	Link
Closeout Package	N/A	P1	1	TEST DOCUMENT.docx		\bigcirc	01/04/2016 12:36 PM	Velasquez, Anabel	2	1	1	8
Agreements & NOAs	Agreement - New/Original		1	TEST DOCUMENT.docx		1	12/15/2015 08:12 AM	Velasquez, Anabel	1	1	1	B
1-2												

ii. Locate the document you would like to remove and select the garbage can icon under the "Delete" column.

										*
Version	Date/Time	Name	File tags	Proposal Identifier	Segment Identifier	Uploaded By	Deleted By	Delete		^
2	01/04/2016, 12:36 PM	TEST DOCUMENT.docx	-	P1	1	Velasquez, Anabel	-	1		
1	12/15/2015, 08:12 AM	TEST DOCUMENT.docx	-	P1	1	Velasquez, Anabel	- 🤇	1		
Note: If only	one version of the document e	xists and you'd like to delete, pleas	e close this window and u	ise the delete function in the /	Attachments page.					
	1.	A warning me	ssage will di	isplay asking	if you are su	re you wan	t to mov	e for	ward with the	
		deletion.				×				
				e you want to delensaction as well a						

ou want to delete this version ction as well as from the
is attachment deletes it from any/all) the entire SPO record.
No Yes

- a. <u>*Note: Deleting this attachment deletes it from any/all transactions AND the entire</u> <u>SPO record.</u>
- 2. The hyperlink to the attachment will no longer be available, however, there is a record of who it was deleted by.



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ATTACHMENTS

REMOVE/ DELETE/ UNLINK ATTACHMENTS (Transaction Level)

*If the transaction is currently assigned to you, search for the desired transaction in your "Dashboard".

*If the transaction is currently assigned to someone else, search for the desired transaction via a simple search.

1. From the "Transaction Home" and on the LHN, click on "Attachments".

Dashboard	Test Record SPO #112823	(Segme	ent 1)						
Project	Anabel Velasquez Pathology				ement Number: 112312 ement type: Clinical Trial		Sponsor: National In Prime Sponsor: Am	nstitutes of Health erican Heart Associat	ion
Segment Summary Transaction Home « Project Personnel Budget Questions Budget Detail Funding Detail	TRANSACTIO Award - New Start Date: End Date: Funded To:	N HOM 05/02/20 05/01/20 05/01/20	015 016		otal Award Budget: \$ otal Funded To Date: \$	1,941,440 1,941,440		Transaction ID: Assigned to: Status:	AW598646 Velasquez, Anabel In Progress
Project Questions			Period 1	TOT	\L				
Terms and Conditions		Start	05/02/2015	05/02/20					
Review & Approve		End	05/01/2016	05/01/20	6				
Attachments	IDC Rate 28%								
View Project Attachments	Tota	I direct \$	1,516,750	\$ 1,516,7	i0				

2. Click on the garbage can icon under the "Actions" column.

Dashboard Project	Test Record SPO #112823 (S Anabel Velasquez Pathology	Segment 1)	Agreement Number: 11 Agreement type: Clinical			Sponsor: National Inst Prime Sponsor: Amer		ion
Segment Summary Transaction Home Project Personnel Budget Questions Budget Detail	ATTACHMENTS Award - New	:					Transaction ID: Assigned to: Status: hment Link to	AW598646 Velasquez, Anabel In Progress Existing Document
Funding Detail	List Attachments							
Project Questions	Category	Subcategory	File Name	Rev #	File Tag(s)	Updated On	Updated By	Actions
Terms and Conditions Review & Approve Attachments « View Project Attachments	Agreements & NOAs	Agreement - New/Original	TEST DOCUMENT.docx	1		15-DEC-2015 08:12	Velasquez, Ana	ibel Trow(s) 1 - 1 of 1
Transaction Log	Next>>Transaction Lo	g						

- 3. A message will display with 2 options- select one:
 - a. "Unlink file from transaction" will remove the attachment from the transaction, but NOT from the project level "Attachments" and not from any other transactions the attachment is linked to.
 - b. "Delete file from project" will remove the attachment from the ENTIRE SPO/ Project record.
- 4. Click "Submit".





USER GUIDE

ATTACHMENTS

EDIT/ REVISE/ UPDATE ATTACHMENTS (Project Level)

- 1. Search for the desired SPO or project.
- 2. Under the "Project Summary", and in the "Left-Hand Navigation" (LHN), click on "Attachments".

Stanford Elec	ctronic I	Resear	ch Ad	lministr	ation
Dashboard Project	Test Record SPO #11282 Anabel Velasquez Pathology	-			ent Number: 112312 nt type: Clinical Trial
Attachments Personnel Summary	Summary	Proposals	Awards	Subawards	Other Transacti
Project Comments Project History	PROJECT	SUMMARY	>		
Other Agreements	Title: RAS-4995 Keyword: Start Date: Funded To Dat	07/08/2013			otal Project Estimate otal Project Funded
	SUBMITTED F	ROPOSALS	ending Awa	RD	
	Proposal ID	Deadline Dat	e	Proposal Type	Start Date
	P1			New	07/08/2013

- 3. Locate the attachment you would like to edit/ revise/ update.
 - a. Click on the pencil icon under the "Edit" column.

Dashboard Project	Test Record SPO #1128 Anabel Velasqu Pathology			greement Number: 11231 greement type: Clinical Tria				tutes of Health an Heart Associati	on				
Attachments « Personnel Summary Project Comments Project History		IENTS	Go (A	actions 💌				Add I	New Attachment				
Other Agreements	Closeout Package Agreements	N/A Agreement -	<u>Proposal Identifier</u> P1	Segment Identifier	Filename TEST DOCUMENT.docx TEST	<u>File Tags</u>	<u>Rev #</u> 2	01/04/2016 12:36 PM 12/15/2015	Updated By Velasquez, Anabel Velasquez,	Linked Trx's		Remove	Link P
	& NOAs 1 - 2	New/Original	•		DOCUMENT.docx			08:12 AM	Anabel		-		107

- **b.** Click on "Choose File" and upload the new attachment.
- **c.** If applicable, enter file tag(s).
- d. Click "Update".

Browse to locate the updated version of:	
TEST DOCUMENT. Just	
Choose File TEST DOCUMENT.docx	
testing	
	//

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ATTACHMENTS

EDIT/ REVISE/ UPDATE ATTACHMENTS (Transaction Level)

*If the transaction is currently assigned to you, search for the desired transaction in your "Dashboard".

*If the transaction is currently assigned to someone else, search for the desired transaction via a simple search.

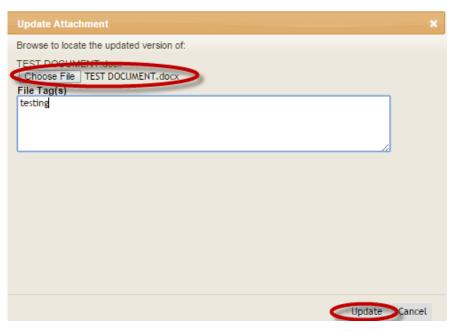
1. From the Transaction Home and on the LHN, click on "Attachments".

Dashboard	Test Record SPO #112823	(Segm	ent 1)						
Project	Anabel Velasquez Pathology					nt Number: 112312 nt type: Clinical Trial	Sponsor: National I Prime Sponsor: Am	nstitutes of Health erican Heart Associat	ion
Segment Summary Transaction Home « Project Personnel Budget Questions Budget Detail	TRANSACTIO Award - New Start Date: End Date:	05/02/20	D15			Award Budget: \$ 1,941,440 Funded To Date: \$ 1,941,440		Transaction ID: Assigned to: Status:	AW598646 Velasquez, Anabel In Progress
Funding Detail	Funded To:	05/01/2	D16						
Project Questions			Period 1	т	OTAL				
Terms and Conditions		Start	05/02/2015	05/02	/2015				
Review & Approve		End	05/01/2016	05/01	/2016				
Attachments	ID	C Rate	28%						
View Project Attachments	Tota	I direct \$	1,516,750	\$ 1,51	6,750				

- 1. Locate the attachment you would like to edit/ revise/ update.
 - **a.** Click on the pencil icon under the "**Actions**" column.

Segment Summary Transaction Home Project Personnel Budget Questions Budget Detail	ATTACHMENTS Award - New						Transaction ID: Assigned to: Status: chment Link to E	AW598646 Velasquez, Anabel In Progress Existing Document
Funding Detail	List Attachments							
Project Questions	Category	Subcategory	File Name	Rev #	File Tag(s)	Updated On	Updated By	Actions
Terms and Conditions Review & Approve Attachments « View Project Attachments Transaction Log	Agreements & NOAs	Agreement - New/Original	TEST DOCUMENT.docx	1		15-DEC-2015 08:12	Velasquez, Ana	bel (2007) row(s) 1 - 1 of 1
Transaction Log	Next>>Transaction Log]						

- b. Click on "Choose File" and upload the new attachment.
- **c.** If applicable, enter file tag(s).
- d. Click "Update".



era Stanford Electronic Research Administration

USER GUIDE

<u>MATRIX</u>

	Department	Central Office		
CATEGORIES & SUBCATEGORIES	View	View		
Agreements & NOAs	<u>∕</u>	▼		
Agreement - New/Original	✓	√		
Agreement - Amendment		√		
NOA - New/Original	✓	√		
NOA - Amendment	✓	√		
NOA - Administratively Issued	✓	✓		
Correspondence or Backup		✓		
Master Agreement - Amendment		✓		
Master Agreement - New/Original		✓		
Agreement Redline		✓		
Zero-Dollar Agreements	✓	✓		
Agreement - New	✓	✓		
Agreement - Amendment	✓	✓		
Correspondence or Backup		✓		
Agreement Redline		✓		
Proposal Documents	✓	✓		
Proposal - New	✓	✓		
Proposal - Resubmission	✓	✓		
Proposal - Supplement	✓	✓		
Proposal - Renewal	✓	✓		
Proposal - Non-Competing Continuation	✓	✓		
Abstract	✓	✓		
Statement of Work	✓	✓		
	✓	✓		
Just-In-Time Documents	✓	✓		
Correspondence or Backup		✓		
□ Other	✓	✓		
Proposal - DRAFT	✓	✓		
SLAC Budget	✓	✓		
SLAC Statement of Work	✓	✓		
Sub-Award Proposal Documentation	✓	✓		
Detailed Budget and Justification	✓	✓		
Budget - New	✓	✓		
Budget - Resubmission	✓	✓		
Budget - Supplement	✓	✓		
Budget - Renewal	✓	✓		
Budget - Non-Competing Continuation	✓	✓		

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Department **Central Office** View **CATEGORIES & SUBCATEGORIES** View ✓ \checkmark **Budget - Draft** ✓ \checkmark **Budget - Revised** ✓ √ □ Justification ✓ \checkmark □ Waiver \checkmark ✓ ✓ ✓ **5 Day Proposal** ✓ ~ ✓ ✓ □ PI Effort \checkmark \checkmark Program Guidelines √ \checkmark □ Program Guidelines ~ ~ Compliance Document \checkmark ✓ Conflict of Interest Eldort Control \checkmark ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ 1 ~ □ Other < General Project Correspondence ~ ✓ \checkmark ✓ **Clinical Trial Documents** \checkmark ✓ □ Budget - Internal ✓ ✓ Budget - E Hernal ✓ ✓ Budget - Final, E **Hernal** ✓ Budget - Final, Internal ✓ ✓ ✓ □ Certificate of Insurance \checkmark \checkmark Investigator Agreement ~ □ Budget - PI Approved \checkmark □ Budget - Draft ~ \checkmark ✓ □ Pricing and Correspondence ✓ √ ✓ ✓ □ Sub-Award Documents √ ✓ □ Agreement – New ✓ ✓ □ Agreement – Amendment \checkmark ✓ □ Requisition ✓ \checkmark □ Sub-Recipient Commitment Form – Form 33

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	Department	Central Office
CATEGORIES & SUBCATEGORIES	View	View
Sub-Recipient Commitment Form – Form 33 - COI	✓	✓
Statement of Work	✓	✓
Detailed Budget	\checkmark	✓
Budget Justification	\checkmark	✓
F&A Rate Agreement		✓
Fringe Benefit Rate Agreement		✓
Sole Source & Cost/Price Analysis – Form 45		✓
Audit questionnaire – Form 47		✓
Sub-Recipient Audit Documentation		✓
Risk Analysis Form		√
Correspondence or Backup		√
Sub-Award (Non-Sponsored) Documents	\checkmark	✓
□ Agreement – New	\checkmark	✓
□ Agreement – Amendment	\checkmark	✓
Requisition	√	✓
Sub-Recipient Commitment Form – Form 33	√	✓
Sub-Recipient Commitment Form – Form 33 - COI	\checkmark	✓
Statement of Work	√	✓
Detailed Budget	\checkmark	√
Budget Justification	✓	✓
F&A Rate Agreement		✓
Fringe Benefit Rate Agreement		✓
Sole Source & Cost/Price Analysis – Form 45		✓
Audit Questionnaire – Form 47		✓
Sub-Recipient Audit Documentation		✓
Risk Analysis Form		✓
Correspondence or Backup		✓
□ Notification/Request	\checkmark	✓
□ No-cost E Itension	\checkmark	✓
Re-Budgeting	✓	√
New Sub-Award	✓	✓
Carry Forward	✓	✓
□ Travel	✓	✓
Equipment	✓	✓
PI Change	✓	✓
PI Effort Change	✓	✓
SOW Change	✓	✓
Key Personnel Change	\checkmark	✓

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ATTACHMENTS

CATEGORIES & SUBCATEGORIES	Department View	Central Office View
PI Sabbatical	√	✓
Limitation of Funds	√	✓
Conflict of Interest	√	✓
Other	✓	✓
PTA Setup		✓
Packet New Award		✓
Packet Amendment/Modification		✓
Packet Early PTA		✓
Packet Effended PTA		✓
Packet Costshare		✓
Packet Program Income		✓
Packet Revenue		✓
Packet University Research		✓
Packet Fellowship (No SPO#)		✓
Packet Financial Aid		✓
ePTA Form		✓
Cost Sharing request – Form 37		✓
🗆 Early PTA Request – Form 38		✓
Effended PTA Request- Form 40		✓
Award Configuration Report – 216		✓
PTA Configuration Report – 180		✓
Correspondence or Backup		✓
NIH Termination Notice		✓
NIH Termination Notice		✓
Interim Financial Report		✓
Final		✓
🗆 Interim (FRI)		✓
Closeout Package		✓
□ N/A		✓
Journal Entries		✓
□ N/A		✓
Refund Checks		✓
□ N/A		✓
Final Invoice		✓
□ N/A		✓
Non-Financial Report	✓	✓
Technical -Interim	✓	✓
Technical -Final	✓	✓

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ATTACHMENTS

CATEGORIES & SUBCATEGORIES	Department View	Central Office View
Invention	✓	✓
Property	✓	✓
		√
□ FFATA		√
Project Management		√
Closeout Documents		√
Cost Sharing Budget		√
Cost Sharing Commitment/ Funding Info		✓
Dept Financial Reports		✓
General Correspondence		✓
Other		✓
□Other Agreements		✓
PTA Budget Allocation Information		✓
PTA Set-Up Information		✓
Payment Requests/ Notifications		✓
Sponsor Guidelines		✓
□ Property		✓
Correspondence		✓
Report		✓