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

Overview

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

- New PDRF
- Non Competing Continuation PDRF
- Supplement PDRF
- Competing Renewal PDRF
- Resubmission 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 you will use to manage 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. 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:
Changes to the PDRF

Here are some updates to the new PDRF that will change how you currently interact with the form:

- In “My Action Items” and “My Pipeline”, you can now sort by All Active, All Completed, Completed in last 30 days, Completed in last 60 days, and Completed in last year. You can also sort by Terminated in My Pipeline.
- Navigation has moved from the right column to the left column.
- Termination of a PDRF has moved from My Pipeline (My Processes) to the Actions list in the navigation column.
- PDRF pages have been rearranged a bit and the budget and project questions have been split into two pages. There is also a new Budget Detail page that will be read only at the department level. Only central office will have access to enter data on this page.
- Data fields no longer have a “Search” button. They will now Auto-Fill as you type. Phone numbers are not editable at this time.
Creating a New PDRF

A New 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

3. SeRA will automatically take you to the Proposal Summary: Process Proposal - New page
   a. Select the appropriate Agreement Type from the drop down list and an Agreement Sub-Type if applicable (Agreement Sub-Type is a conditional field which may be displayed based on the type of Agreement selected)
   b. Proceed with filling out the New PDRF by clicking PI & Project Location at the bottom of the form
PROPOSAL SUMMARY
Process Proposal - New

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

<table>
<thead>
<tr>
<th>Period 1</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>End</td>
</tr>
<tr>
<td>Total direct</td>
<td>$0</td>
</tr>
<tr>
<td>Animal care indirect</td>
<td>$0</td>
</tr>
<tr>
<td>Total indirect</td>
<td>$0</td>
</tr>
<tr>
<td>Total</td>
<td>$0</td>
</tr>
</tbody>
</table>

Proposal Type: 
Agreement Type:

Status | Assignee | Assigned | Completed |
-------|---------|---------|----------|
Progress | Nelson, William J | 01-Mar-2011 11:00AM | Reassign |

Next: Print & Project Locations
Creating a Non Competing Continuation PDRF

A Non Competing Continuation (NCC) 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)

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

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
5. **SeRA will display the Transaction Home page**
   a. Check the box under the Period of Performance which applies to this NCC PDRF
   b. Proceed with filling out the NCC PDRF by clicking **PI & Project Location** at the bottom of the form
Step 5a

Proposal Type: Non-Competing Continuation
Agreement Type: Grant
Select Agreement Sub-Type, as applicable: None

Proposition Routing Status

Next: PI & Project Locations
Creating a Supplement PDRF

A Supplement 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)

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

4. SeRA will display the Award Summary: Segment page
   a. Select Process Proposal – Supplement from the drop down list near the middle of the form
   b. Click the Yes button on the confirmation pop-up box
5. SeRA will display the Transaction Home page
   a. Proceed with filling out the Supplement PDRF by clicking **PI & Project Location** at the bottom of the form
Step 5a
Creating a Competing Renewal PDRF

A Competing Renewal PDRF is related to an existing Research Project and can be created from the Project 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)

3. SeRA will display the Project Summary page
   a. Select Proposal – Competing Renewal from the drop down list at the bottom of the form and click the Start Transaction button

a. Select the appropriate Agreement Type from the drop down list and an Agreement Sub-Type if applicable (Agreement Sub-Type is a conditional field which may be displayed based on the type of Agreement selected)

b. Proceed with filling out the Competing Renewal PDRF by clicking PI & Project Location at the bottom of the form
Creating a Resubmission PDRF

A Resubmission 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)

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

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 PDRF
5. SeRA will display the Transaction Home page
   a. Proceed with filling out the Resubmission PDRF by clicking PI & Project Location at the bottom of the form
Step 5a

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:

Agreement Type:

Select Agreement Sub-Type, as applicable:

None

PROPOSAL ROUTING STATUS

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Status</th>
<th>Assignee</th>
<th>Assigned</th>
<th>Completed</th>
<th>Reassign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare PDRF</td>
<td>In Progress</td>
<td>William J Nelson</td>
<td>05/17/2011 04:07 PM</td>
<td></td>
<td>Reassign</td>
</tr>
</tbody>
</table>

Next >>PT & Project Locations