SeRA Default Department PDRF Approvers and FYI’s

SeRA PDRFs auto-populate default approvers and/or FYIs based on the administering department org code indicated on the PDRF and answers selected within the PDRF regarding cost sharing, space renovations, and unapproved use of space.

1. Default Department Approvers and FYI’s are managed in Authority Manager under Research → Stanford Electronic Research Administration. Individuals can be granted either the PDRF Department Approver role, PDRF Department FYI role, or both for an org.

2. To identify who in your organization is able to grant PDRF Department Approver access, PDRF Department FYI access, or both in Authority Manager, please see the Identifying who to contact for Default PDRF Approver & FYI access section of this guide (page 2).

3. To see how to grant default PDRF Department Approver access, PDRF Department FYI access, or both for an org, please see the Granting PDRF Department Approvers and FYIs Access section of this guide (page 3).

4. Upon indicating the Department/Lab/Institute Submitting Proposal on the PDRF under the Admin & Sponsor Details section, any PDRF Department Approver(s) and/or PDRF Department FYI(s) in Authority Manager for that org will auto-populate on the Approvers & Comments page of the PDRF.

5. Additionally, for Other Stanford Faculty (OSF), any default PDRF Department Approver(s) and/or PDRF Department FYI(s) entered in Authority Manager for the OSF’s administering department will auto-populate on the SeRA PDRF.
Identifying who to contact for Default PDRF Approver and/or FYI access for an org

1. Go to Authority Manager
2. Click on Find an Organization from the left-hand navigation menu

3. The below pop-up dialogue box will open. Enter the relative org name or 4-character org code and click enter on your keyboard. You can also click on the “Browse Organization hierarchy” link to view the entire Stanford org tree and make your selection from there.

4. Once you have identified the org for which you are looking and it is highlighted in bold text, click on it.

5. You will be navigated to the selected org’s Authority page. Please note, this page may take up to 30 seconds to load. Scroll down to the Research subheading. Any person listed with PDRF Department Approver and/or PDRF Department FYI grantable authority (check mark circled in red in the below image) has the ability to grant PDRF Department Approver and/or PDRF Department FYI access for that org and can follow the below instructions to do so.

A. If the org does not have a Research subheading then no one has to date been identified as a PDRF Department Approver and/or PDRF Department FYI for this org. You can either look at a higher [parent] org level to see if someone has grantable access there, or submit a SeRA helpticket for assistance.

B. If the org does not have anyone with grantable PDRF Department Approver and/or PDRF Department FYI access. You can either look at a higher [parent] org level to see if someone has grantable access there, or submit a SeRA helpticket for assistance.
Granting PDRF Department Approver and/or FYI Access

1. Go to Authority Manager
2. Click on Grant Authority

3. Enter SUNet ID, click Search, and click on User’s name

4. Select Stanford Electronic Research Administration

5. Select either PDRF Department Approver or PDRF Department FYI

6. Key in the desired org code, click Search, then select the listed org code

- To setup approvers for multiple org codes, this exercise must be repeated for each

7. Select the permission levels - If more than one role is selected, the user will only receive one approval task/email for each PDRF
A. **All Proposals** – An approval task/email will be triggered for ALL proposals for the administering department (indicated on **Admin & Sponsor Details** page of PDRFs)

B. **Cost Sharing Committed** - An approval task/email will be triggered if they answer **Yes** and check off at least one of the following cost share questions (from the **Budget Questions** page)

C. **Project Requires Space Renovations** - An approval task/email will be triggered if the answer is **No** to “Is all of the above space assigned to you or otherwise approved for your use?” (from the **PI & Project Location** page)

D. **Unapproved Use of Space** - An approval task/email will be triggered if the answer is **Yes** to the question “Do you anticipate rental space, construction or renovations will be required to house this project or any equipment acquired for this project?” (from the **PI & Project Location** page)
8. Set the conditions for the User to be able to grant this access to others, key in comments as necessary, and click **Finish**