What has changed?
A new version of SeRA was released on October 28th, 2017.

The main change is the new RMG Proposal Intake Form (PIF) for the School of Medicine. This enhancement adds a brand new transaction type to support and facilitate the initiation of a proposal by SoM faculty. The PI (or department administrator) will initiate the PIF and gather the initial proposal information RMG needs. Once this information is gathered and the PIF is routed to RMG, the RPM will be able to quickly act and build out the proposal budget. These changes should streamline the process and make the process more transparent for everyone involved. This new process will be piloted through the end of the year and will be fully implemented early next year.

<table>
<thead>
<tr>
<th>SoM Proposal Development Process</th>
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<td><strong>Submitter</strong></td>
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<td>(PI or Admin)</td>
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<tr>
<td>Start</td>
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<tr>
<td>Create &amp; Prepare PIF</td>
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<tr>
<td>Approve PIF &amp; Complete COI</td>
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<td>Review PIF</td>
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<tr>
<td>Create PDRF</td>
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<td>Create Budget</td>
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<tr>
<td>Complete PDRF &amp; Submit Proposal</td>
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<tr>
<td>Approve PDRF</td>
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<td>End</td>
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In addition, this release includes updates for the My Projects page and some nice changes & bug fixes for the Other Support Report. Also, a number of smaller enhancements and bug fixes are included in this release.
Resources for more information:
The School of Medicine will announce upcoming training sessions for the Proposal Intake Form (PIF).
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RMG Proposal Intake Form (PIF)

**PIF Overview**
The RMG Proposal Intake Form (PIF) is designed so a PI or Department Administrator in the School of Medicine (SoM) can complete a simple form with all the required information to start the proposal process.

The salient features of PIF are:

- Simple for SoM faculty or Department users to complete
- PIF collects all required information for RMG RPM to start a Budget
- PIF collects information on PI, Department, Proposal requirements (RFP), Project Questions
- RPM can initiate a PDRF from PIF
- Most fields from PIF feed into the PDRF
- PI completes approval and Conflict of Interest (COI) declaration only once at PIF and do not need to approve the PDRF
- RPM selects Transaction Type as well as Agreement Type.

**How to Start a PIF as a PI**
PIs can start a PIF in SeRA from their My Projects dashboard by clicking on “Start School of Medicine Proposal”. In the dropdown, select SoM Proposal Intake form (PIF).
How to start a PIF as a Department Administrator
Department Administrators can start a PIF in SeRA from their dashboard by clicking on “Start Proposal”. In the dropdown, select SoM Proposal Intake Form (PIF).

After starting a PIF, the initiator needs to decide whether the PIF is a New Project, Renewal, Resubmission or a Supplement. Depending on this selection, the system either creates a blank PIF (New Project) or creates a PIF with some pre-filled fields from the selected project.

PIF Pages & Process Flow
There are 5 pages in the PIF which need to be completed prior to routing. They are:

1. PI & Department
2. Sponsor and Budget Details
3. Project Questions
4. Attachments
5. Complete and Submit Page

Once the initiator completes all the pages, the PIF is submitted for approval and the PI completes their approval & COI certification.
The PIF transaction then goes into the “RMG Intake” queue where an RPM will pick up and review the request. If all of the data looks correct, the RPM closes the PIF and creates the PDRF. The PDRF then follows its current process except that the PI will not need to approve the PDRF. Data from the PIF including attachments feeds into the PDRF.

**My Projects**

*Changes for the My Projects dashboard*
The My Projects page is revamped so faculty can more easily find information about their projects! Action items display prominently at the top of the page in a region labeled 'Open Tasks'. This makes it easy to see items that need attention. The other options on the page are reordered and simplified with more commonly used items near the top. The instructional text now better describes what can be viewed in each option. A new option has been added titled 'Recently Ended Projects,' which will open a page displaying all projects which have ended in the last 18 months. The start buttons at the top of the page have also been updated so a PDRF or School of Medicine Proposal can easily be initiated from this page.

![My Projects dashboard image](image)

*Issues with My Projects results fixed*
Because of a previous issue with people records, some faculty had faulty backend data that caused some of their projects to not display in the My Projects reports. This issue is resolved so all projects a faculty member is associated with will be pulled in.

Additionally, there were previously some issues where admins could not see all of their faculty member’s projects if they did not have access to the projects. Now, the results mirror the results shown for faculty and permissions are checked when trying to access a project.
Other Support Report Updates

**Font on Word download set to standard font**
The Other Support – NIH Word download is now formatted to the correct NIH standard font (Arial, size 11).

**SPO numbers links to projects for Other Support Reports**
SPO numbers now show as a hyperlink on both the Other Support Report – NIH and Other Support Report - General. Clicking on the link will open the project summary page for that SPO.

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![Other Support Report (NIH Format)](image)

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**Other Support Report Bug Fixes**

- We have resolved the issue of Prime Sponsor and Prime Agreement number not always showing correctly on the Other Support Reports when the agreement type is a Subcontract.
- A column was displaying on the Other Support Report – General that was showing backend data. We have removed this column from showing on the report.
Other Changes

*Attachment file names are editable*

Users can now edit an attachment and change the file name within SeRA!
View routing history & comments for terminated transactions
Previously, terminated transactions were completely inaccessible. Now, the routing history & routing comments of terminated transactions are viewable when opening the transaction. This allows users to know who terminated a transaction and why a transaction was terminated.

View PDRF/Attachments/AAN can be opened in multiple pop-up windows
The system now allows multiple pop-ups to be open simultaneously from the quick links to facilitate work that requires information from multiple different sources at one time.

Small Enhancements / Bug Fixes
- Added links from SeRA to Stanford Profiles and eProtocol under the Navigation menu.
- Added links to training seminars & Central Office assignments under the Help menu.
- The View PDRF now shows the correct data for the international & global business questions.
- Email notifications with very large comments entered on OSR Request Forms are now sent out. (Previously there was an issue when comments were too big.)
- The rules for deleting IDC Waiver attachments is now consistent with how other attachments in SeRA are deleted.
- OSR Request forms can no longer be started if the PDRF is not complete to avoid errors.
- There is now a link to easily attach foundation compliance approval when a restricted foundation is selected as the sponsor.

Central Office Changes

**IDC Waiver approval routing changes**
The Dean of Research group can now add an additional approver when an IDC Waiver transaction is with them for approval. Approvers and FYI(s) also had an issue with removing and reordering during the Prepare IDC Waiver task which is now resolved. **Note: The PI will ALWAYS be first approver and the Dean of Research office will ALWAYS be the last approver.**
Subaward Changes

Subawards: System-generated Intake Email to Department
SeRA can now generate and send subaward intake emails to department administrator(s) as soon as the subaward transaction is reassigned. This feature is only available to subaward administrators and replaces the current manual process to send this email.

Stanford | SeRA
FYI: Subaward in progress

Details: We have received a requisition for the following subaward which will be coordinated by Angel Chen. Please feel free to contact Angel Chen if you have any questions.

NOTE: If the subrecipient's scope of work involves human or animal subjects, the subrecipient must be explicitly named in a protocol approved by the Stanford IRB or APLAC before the subaward can be signed by Stanford.
This requirement applies whether or not Stanford's portion of the project involves human or animal research. Please click here for more information on how to submit a protocol.

Subaward:
- PO Number: 60120672
- Requisition: 4239947
- Subrecipient: University of Pennsylvania
- SPO: 51128
- Transaction: SUB664624
- Principal Investigator: Mansi Tamura
- Sponsor: National Institute of Health
- Project Title: WND the Kidneys

View Subaward ---

Please do not reply to this email. Need technical help? Please submit a Help Ticket.

Subaward Risk Assessment Changes
It was not intuitive to users where to enter the Assessment as there was no open field or indication they can update anything on the interactive grid.

We have made the following changes to the Risk Assessment page:

- Turned the interactive grid into a report display on the page
- Added an Edit button that when clicked will open up a pop-up window where the user will be able to edit fields.
- Added a Certify button that when clicked will record the last updated on and last updated by. The Certify button gets disabled after clicked on once or if an Edit is performed.

Risk Assessment Page:
Subaward smaller changes

- Requisition Number on the Transaction Home is now a hyperlink.
• When a user links to another subaward transaction, they will now see the linked transactions on the new transaction as well as the old and will be able to click into the transaction.

• When a subaward transaction is returned for correction, the assigned IO is now able to add comments in the Subaward Transaction Home page.

• Dates within subaward transactions now display in the SeRA standard format mm/dd/yyyy. Dates are accepted in date fields in the format m(m)/d(d)/yy(yy).

• The subawards region on the Project Summary page will now only display one record per PO.

• The front-end display now shows that subaward admins are being added to the email for Internal Distribution and Internal Distribution
New Sponsor Setup Request
SeRA now has a new OSR Request Form for new Oracle sponsor setups that Accounts Receivable will be responsible for managing. The request type for these new setups is called, "Request New/Update Oracle Sponsor".

The process for this new OSR Request Form is as follows:

1. Accountant will access a SPO in SeRA and start an OSR Request Form.
2. The "Request New/Updated Oracle Sponsor" request type is selected from the Request Type drop-down menu in the Start Transaction pop-up window.
3. Accountant fills out the description to describe what they need and submit the request.
4. AR will pick up the request from the Account Setup Intake queue and process the request in Oracle.
Small fixes for Other Agreement Logs
In preparation of bigger changes to the Other Agreement Log, the column title Sponsor is changed to Party on the Other Agreement Log Summary Dashboard. Also, a bug was fixed where information from a previous Other Agreement Log was remaining and copying into a new Other Agreement Log when initiated directly after.

Small Enhancements / Bug Fixes
This release also includes a number of small bug fixes and enhancements for central office functions. These fixes include:

- Adding CFDA field to Award transactions with Federal sponsors.
- Moving the CFDA validation to the “Review for Completeness” check at the end of the transaction (similar to other award level validation).
- Fixed an issue with OSR Request Forms closing automatically.
- Added link to ARC from PTA Manager and links to ARC and Subawards Monitoring from IDC Waivers.
- Fixed issues with the date format on the Transaction Log.
- Resolved issues with the ordering of Negotiation Tracking items on the Other Agreement Log.
- Updated the Initiate Parallel Transaction page to be consistent with other pages throughout SeRA. Highlights include adding jump-to sections, making sections collapse/expand, display of PI information (dept, phone, and email), adding actions menu button, cleaning up the left hand menu and removing quick links menu.
- Individuals who no longer work in OSR Post Award were not showing in reports. This is updated so that reports are accurate and keep the historical data.
- The “Urgent” value in the CT Overall Track field on the Transaction Log is updated to “Expedited”.
- The "IT Security Requirements" option in the Issues LOV on Transaction Log is renamed to "IT/Information Security Requirements".
- In The Award Clinical Trial Transaction Log, the values for the fields “Budget Managed by CCTO” and “Budget Amendment Fee” radio buttons are now saving.
Technical Changes

**OPACS trigger logic moved from OPACS to SeRA**
The logic in the code which determines whether to create a task in OPACS was moved from the OPACS system to the SeRA system. This allows for better maintainability of the code and less dependency/tight integration between the two systems.

**Checksum changes for all applications hosted in SeRA**
Recently Stanford discovered a security vulnerability within other Stanford systems due to insecure URLs. Due to this, security changes were recommended for all Stanford applications to restrict the ability to tamper URLs. SeRA now has checksum checks for URLs to prevent URL tampering for all of our applications hosted on SeRA servers.